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EUROPEAN RESEARCH PROJECT //

Collecting and analysing data for the post-27 INTERREG (Core-IB)

Austria-Germany (Bavaria)

Border profile

March 2026

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This delivery does not necessarily reflect the opinions of members of the ESPON 2030 Monitoring Committee.

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1 Introduction

1.1 Context and objective of the border profile

The ESPON Core-IB project (Collecting and analysing data for the post-27 INTERREG) provides evidence-based, non-binding analytical work to support the next generation of Interreg programmes post-2027. By collecting and analysing harmonised territorial data, the project highlights key socio-economic characteristics, cross-border interactions, and governance structures. Its spatial focus covers 48 cross-border cooperation areas (40 land and 8 maritime), including all EU internal border regions and those bordering Liechtenstein, Switzerland, and Norway. The findings are analytical and informative; they do not create regulatory or policy obligations for Member States, the European Commission, or programme authorities. Each border profile serves as a comparable knowledge base for policymakers at EU, national, and regional levels, supporting dialogue and reflection rather than prescribing policy choices. The profiles aim to provide consistent, data-driven territorial evidence that can inform strategic discussions about future cross-border cooperation and contribute to the preparation of Interreg programmes post-2027.

The Core-IB border profiles are designed to support the upcoming steps in the Interreg programming process with analyses based on data that is available at the European scale, including ESPON, Eurostat, DG REGIO, JRC, and Interreg databases. Their main purpose is to ensure comparability of data analyses and to provide programme areas with access to recent harmonised data at high geographical resolution (NUTS3 level or finer). Member States may hold additional or more detailed data which can further enrich or contextualise the findings beyond the Core-IB project. These national sources are essential for refining and validating territorial evidence in policymaking processes, including additional regional, fine-scale information and insights from political processes related to prioritisation and objective setting. All border profiles follow a systematic and methodologically robust approach. They provide territorial evidence, structured along 6 thematic dimensions, offering insights into the geographic, economic, environmental, socio-economic, border security and governance characteristics of the border region. Quantitative data and qualitative analyses are combined to ensure meaningful insights into all 48 border areas. Due to methodological constraints and limited resources, local studies and national datasets falling outside the European data framework could not be included. Visualisations, such as maps and charts based on descriptive statistics, facilitate understanding and support evidence-based policymaking. The profiles analyse the border region as a whole at NUTS3 (2021) level (corresponding to the current Interreg VI-A programme area)[1] and position it within a broader European context. For comparative purposes, several reference categories are applied:

- European averages (EU27 + Norway, Switzerland and Liechtenstein, depending on data availability)
- National averages
- National border region averages
- Aggregated border region averages

To complement the quantitative evidence, the profiles also draw on strategic and qualitative sources, including:

- Strategic documents from the Interreg Programme 2021-2027
- Border Orientation Papers from the 2021-2027 programming period
- Information from the keep.eu database on cross-border cooperation activities
- Information from the Cohesion Open Data platform
- Information from the b-solutions initiative
- Information from recent ESPON Projects (i.e., CROSSGOV, House4All, PROFECY Update, CPS 2.0)

[1] As defined by Annex 1, Commission Implementing Decision (EU) 2022/74 of 17 January 2022, as amended by Commission Implementing Decision (EU) 2023/1638 of 14 August 2023 (OJ L204, 17.8.2023, p. 9): https://eur-lex.europa.eu/eli/dec_impl/2022/75/oj/eng

Within the ESPON framework, the CROSSGOV project (Governance mechanisms for cross-border functional areas) has been implemented in parallel to Core-IB. The CROSSGOV hub[2] provides a comprehensive platform for interactive data exploration, and selected data have been incorporated into this study.

Additional project-related information can be explored separately in the Core-IB **Final Report**. Further technical information on this border profile can be found in a separate **Technical Annex** providing an overview of data and methods.

1.2 Presentation of the border area

The Interreg VI-A border region 'Austria–Germany/Bavaria' covers the area between south-eastern Germany and western Austria (see Figure 1.1). In Austria, the programme area includes most of the federal states of Vorarlberg, Tyrol, Salzburg, and Upper Austria in western Austria, comprising a total of 14 NUTS3 regions. In Germany, it covers parts of the administrative districts of Swabia, Upper Bavaria, and Lower Bavaria in the Free State of Bavaria, encompassing a total of 26 NUTS3 regions.

Figure 1.1: Overview map

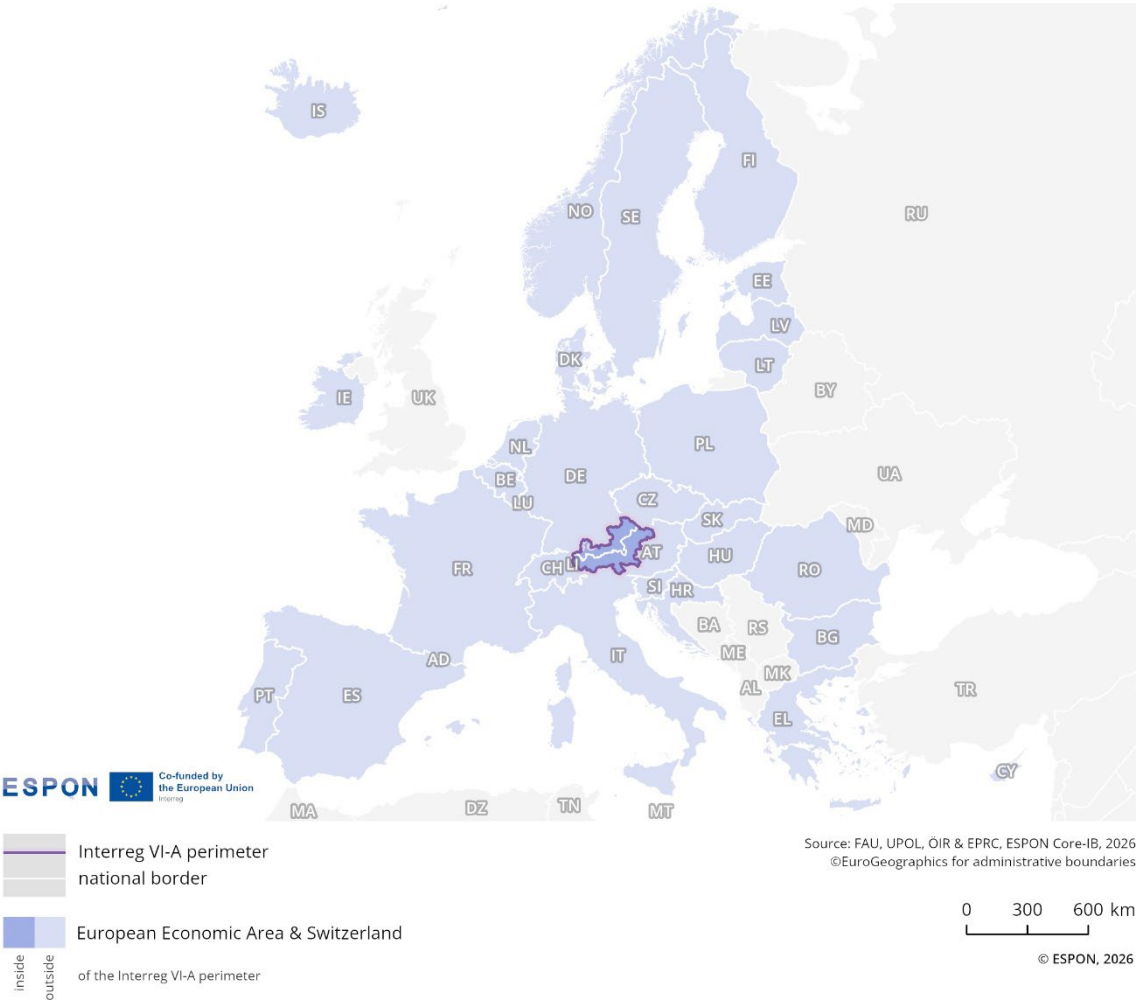
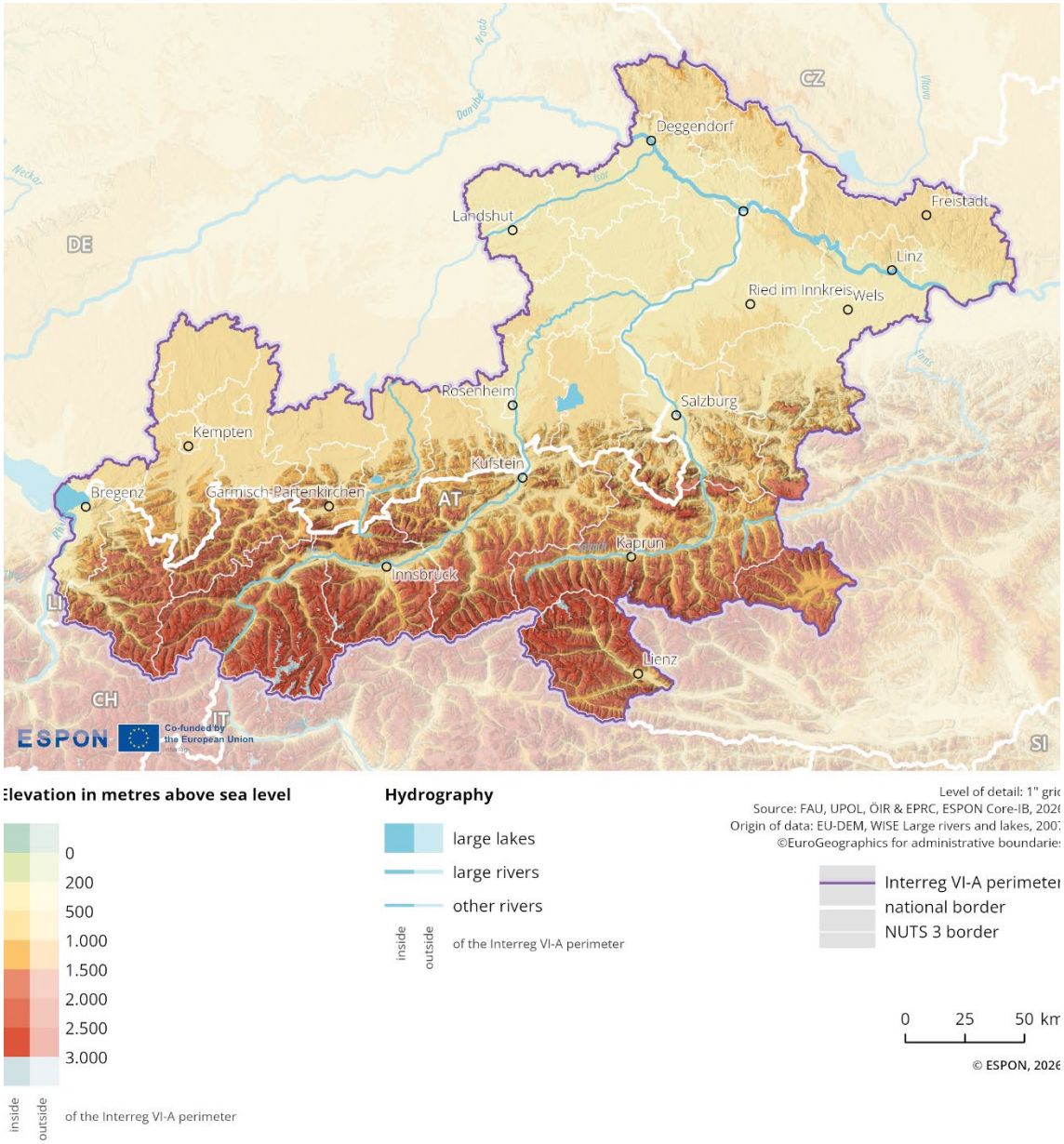


Figure 1.2 illustrates the region's geomorphological features and the perimeter of the current Interreg VI A programme area. Spanning approximately 56,000 km², the border region exhibits a high degree

[2] ESPON CROSSGOV Hub: https://gis-portal.espon.eu/arcgis/apps/experiencebuilder/experience/?id=27e3b86ef44441b08793a2239c370607

of heterogeneity. It extends along the entire 800-kilometre length of the Austrian–Bavarian border. Starting at Lake Constance in the west, it stretches across the Alpine foothills, the Northern Limestone Alps and the Bavarian Forest, reaching the tri-national border area between Germany, Austria and Czechia in the Bohemian Forest in the east. The area lies between the metropolitan regions of Vienna, Munich, and Zurich. To the west, the border largely follows mountainous terrain, including sections of the Allgäu and Lechtal Alps, before descending into the Lower Inn Valley near Kufstein, a major north–south transport corridor. To the east, the landscape transitions from rugged alpine and pre-alpine zones to the broad river valleys of the Inn, Salzach and Danube. The terrain becomes increasingly hilly and then flat towards the east.

Figure 1.2: Geographical features and characteristics[3]



The border region is characterised by a rich variety of geomorphological formations, including glacial valleys, karst landscapes, and river terraces. The Danube, Inn and Salzach rivers are major hydrological features which serve as natural corridors and influence land use patterns. Extensive forested areas,

[3] The selection of displayed settlements is based on factors such as size, administrative or cultural importance, transport links, regional coverage and cartographic clarity. This is part of a standard cartographic generalisation process with no pre-set thresholds, and the main aim is to provide orientation.

particularly in the Bohemian and Bavarian Forests, contrast with intensively used agricultural zones and densely populated urban areas in the Alpine foothills. These diverse topographical features have a significant impact on settlement structures, accessibility, and regional connectivity.

2 Cross-border analysis

2.1 Territorial dimension

The territorial dimension refers to the spatial characteristics and dynamics of a border region. It specifically depicts how factors such as population density, demographic trends, changes in settlement areas and accessibility influence and reflect cross-border integration.

2.1.1 Population and settlements

This sub-dimension illustrates the population characteristics and land use dynamics of the border region, based on analysed indicators. It examines population density, population development by age groups, and changes in settlement areas. The analysis highlights whether the border functions as a catalyst for integration or as a barrier. Comparisons with the respective countries and the EU average provide context for understanding the region's dynamics.

2.1.1.1 Population density

Indicator description

Population density refers to the number of residents per km². This indicator shows the number of inhabitants per square kilometre in a 1x1 km grid. It therefore provides information on the distribution and concentration of population across the region and allows to identify agglomerations of high density. In particular agglomerations at or close to the border area of key interest.

- **Source**: Eurostat
- **Temporal coverage**: 2021
- **Unit**: Inhabitants/km^2

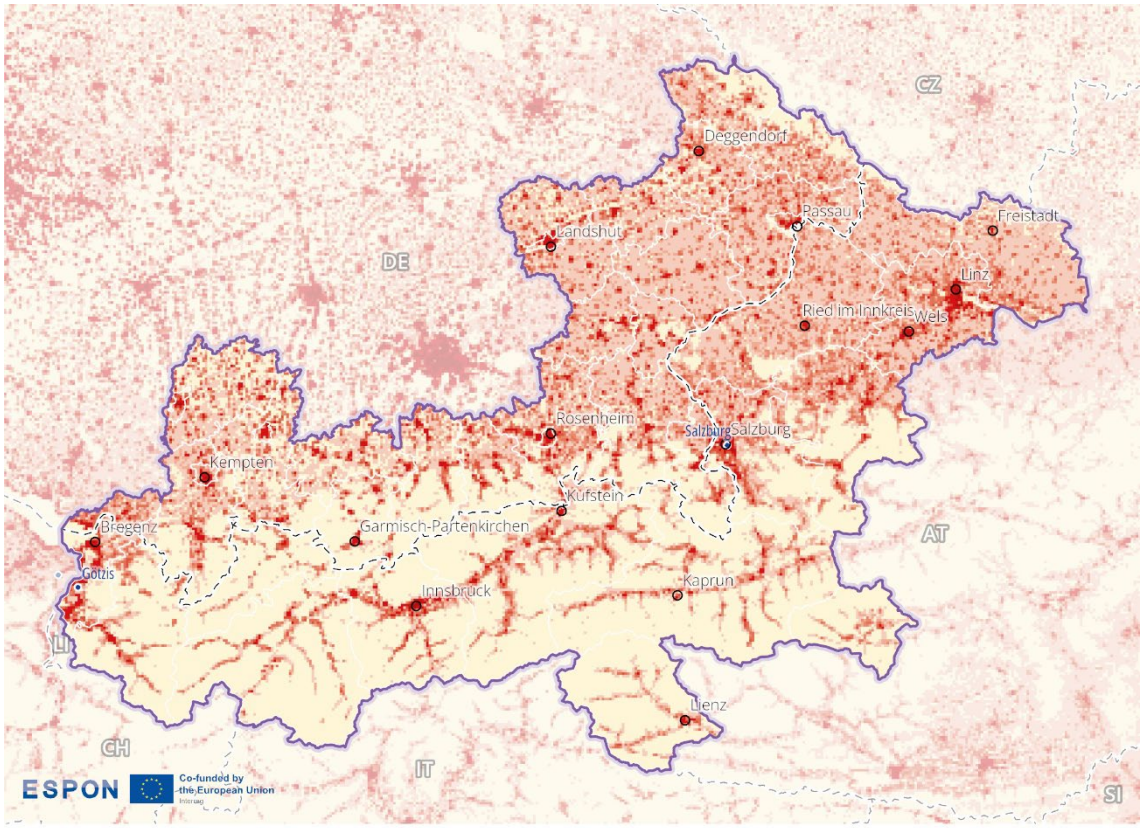
Please refer to the technical annex for more information.

Figure 2.1 shows that the border region includes 13 urban centres with a population of over 30,000 inhabitants. The highest population density was recorded in the areas around Linz (213,000 inhabitants), Salzburg (158,000), Innsbruck (137,000), and Kempten (70,000). Compared to the southern regions of Austria, the northern part of the border region of Germany has a denser and more evenly populated territory, except for the mountainous areas. In the Austrian part, the population is concentrated in mountain valleys. The mountainous regions of the Alps are sparsely populated or uninhabited. Its maximum density is approximately 12,000 inhabitants/ km², and it is located in Innsbruck.

The population density in this whole border region is 110 inhabitants/km², which is comparable to the EU average of 109 inhabitants/km² (according to EUROSTAT), and it is lower than the aggregated average of all EU evaluated border regions, which is 125 inhabitants/km².

The part of the border region in Austria has an average population density of around 94 inhabitants/km². It is lower than the national average population density in Austria (106 inhabitants/km²). The part of the border region in Germany has an average population density of around 132 inhabitants/km². It is lower than the national average population density in Germany (231 inhabitants/km²).

Figure 2.1: Spatial patterns of population distribution



Number of inhabitants/km² (2021)

- 1–50
- 51–100
- 101–200
- 201–500
- 501–1,000
- 1,001–5,000
- 5,001–56,158
- no population

inside / outside of the Interreg VI-A perimeter

Twin cities (2025)

cities/towns with 10,000+ inhabitants not further than 5km from another one accross a country border

Border cities (2025)

other cities/towns with 10,000+ inhabitants not further than 10km from another one accross a country border

Level of detail: 1km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: GISCO Population Grid (version 1.3), 2021
OpenStreetMap, 2025
©EuroGeographics for administrative boundaries

- Interreg VI-A perimeter
- national border
- NUTS 3 border

0 25 50 km

2.1.1.2 Population development (by age groups)

Indicator description

Population development refers to the percentage change in population at regional level between 2014 and 2024. The data reflects on the total population, as well as on the age groups 0-14, 15-64 and 65+.

- **Source**: Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2024
- **Unit**: Change in %

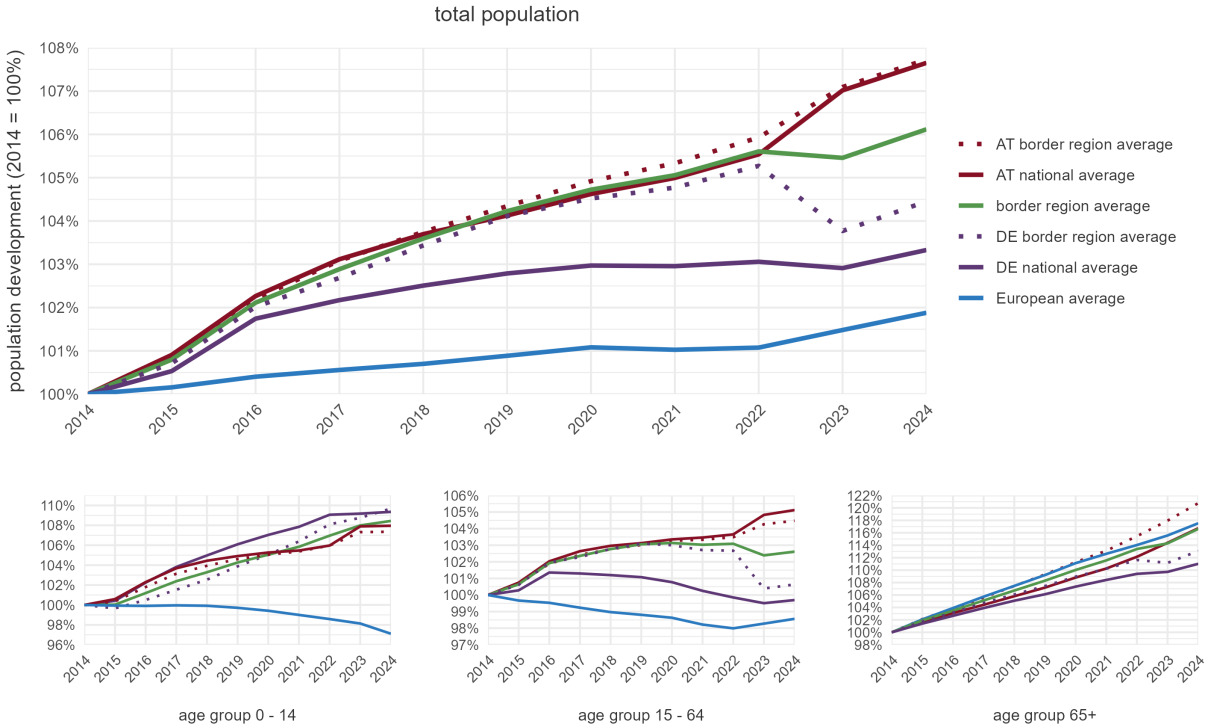
Please refer to the technical annex for more information.

Population in the Austria–Germany/Bavaria region in 2024 (Eurostat): 6.1 million inhabitants, of which:

- 48.4% in the German border territory (2.9 million inhabitants)
- 51.6% in the Austrian border territory (3.1 million inhabitants)
- Region within the border region with the highest population increase since 2014: Mühldorf a. Inn (DE21G) at 11.0%

Figure 2.2 shows the population growth in the Austria–Germany/Bavaria region between 2014 and 2024. During this period, the region has experienced moderate growth of 6.1%, with the highest growth rate observed on the German side.

Figure 2.2: Population development (2014=100)



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Population growth across the Austria–Germany/Bavaria border region is substantially above the European average (6.1% vs. 1.9%) and also substantially higher than the average development in all

border regions (6.1% vs 1.5%). While the Austrian border area shows similar growth to the national average (7.7% vs. 7.7%), the German border area shows slightly higher growth than the national average (4.5% vs. 3.3%).

In terms of the development of individual age groups in the region, the population aged 0–14 experienced a notable increase of 8.4%, while the working-age population (15–64) showed a slight increase of 2.6%. The population aged 65 and over underwent a substantial increase of 16.6%.

2.1.1.3 Change in settlement areas

Indicator description

The indicator shows the relative change in settlement areas per LAU in the border region. It considers changes in land cover, from non-artificial areas (such as agricultural, forest and seminatural areas, wetlands and water bodies) to artificial areas (such as urban, industrial, construction sites) between 2012 and 2018. This indicator has to be viewed alongside population development in particular.

- **Source/method of retrieval**: The indicator is retrieved via processing of raster data from CORINE Land cover. The raster information is crossed with Local Administrative Units (LAU) to calculate a change in %.
- **Temporal coverage**: 2012-2018
- **Unit**: Change in %

Please refer to the technical annex for more information.

Figure 2.3 illustrates the change in settlement areas at municipal level between 2012 and 2018. Overall, the map shows similar patterns of change in settlement areas on both sides of the German-Austrian border. Changes are evident in particular around the urban centres of Kempten, Rosenheim, Landshut, Passau, Linz, Salzburg, Kufstein and Innsbruck. Garmisch-Partenkirchen is an exception, with no significant change during the observed time period. High growth in settlement areas is particularly evident in the Inn Valley between Innsbruck and Kufstein as well as in the valleys towards Salzburg. In close proximity to the national borders, the settlement area increases mainly in Kufstein, Salzburg and the Innviertel in Austria. On the German side, this is true for Passau, Altötting and Traunstein. The map also reflects the topographical characteristics of the border region, with hardly any changes in settlement areas visible in steep, high-altitude mountainous areas.

Figure 2.3: Settlement area dynamics

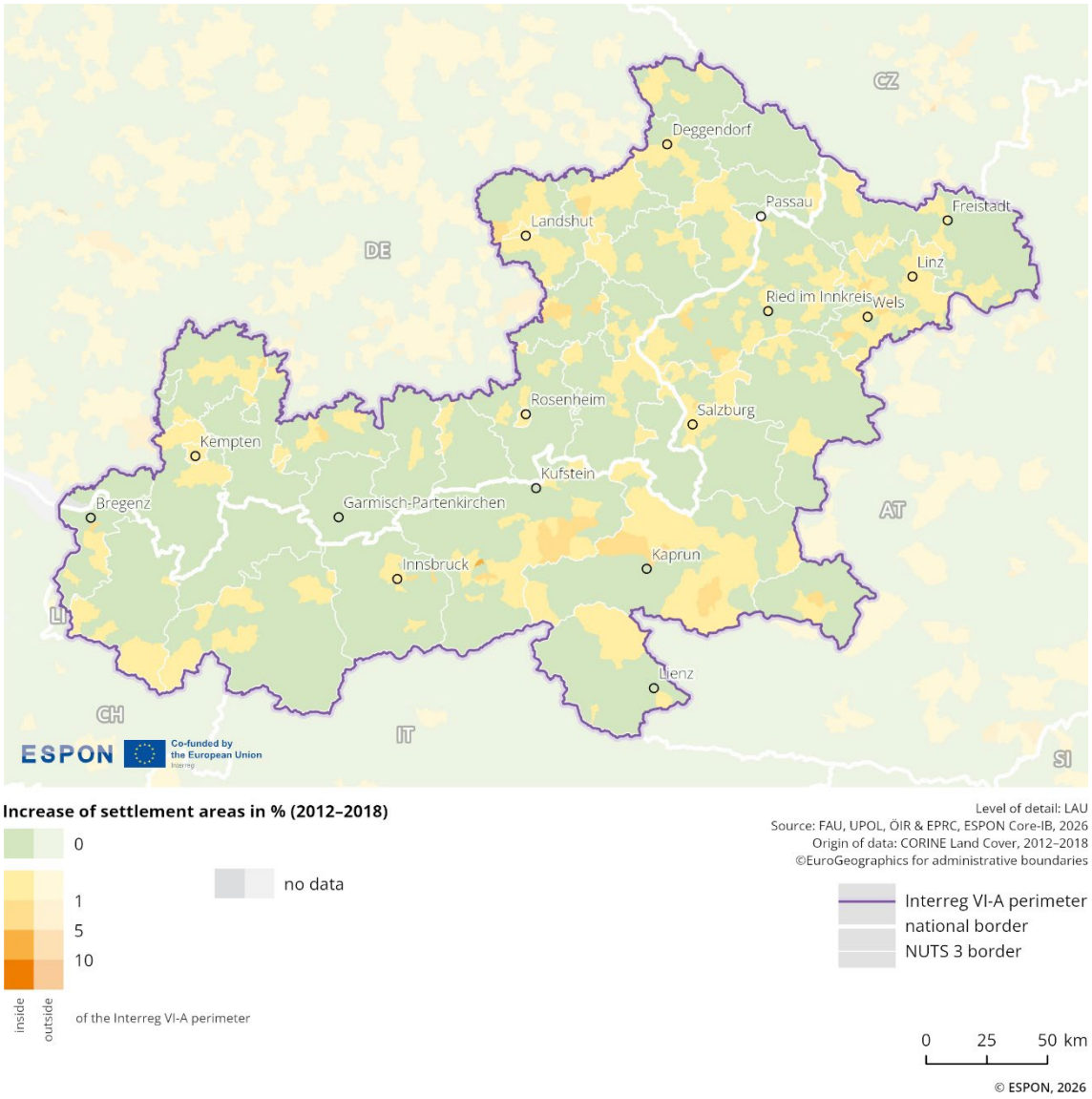
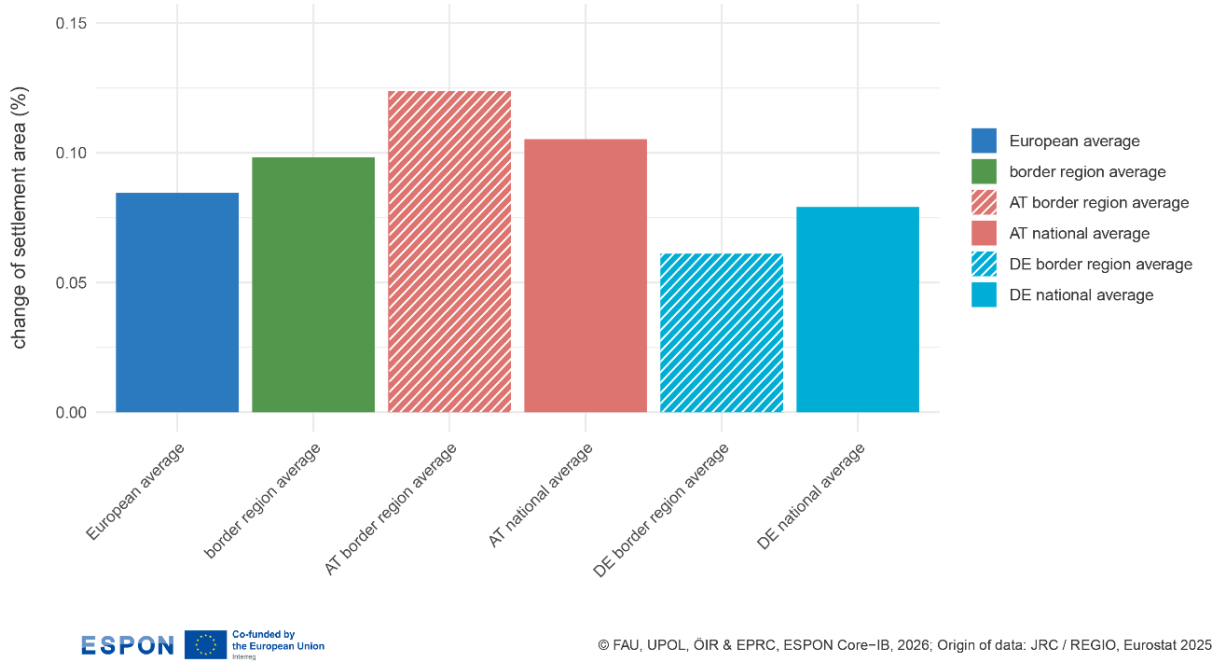


Figure 2.4 presents the change in settlement areas from a comparative perspective. The average for the Austria–Germany/Bavaria programme area is above the overall European average, which includes both EU member states and the EFTA (European Free Trade Association) countries Switzerland, Liechtenstein, and Norway. The Austrian values are higher than the German ones, which applies for both, the national average as well as the border regions. The Austrian border-regional average lies above the national Austrian average, whereas the German border-regional average is lower than the national German average.

In general, the programme area shows a dynamic settlement development. The need for an integrated approach to spatial development is obvious. Spatial development has to balance the various demands on land use (e.g., residential, commercial, tourism, transport, agriculture, and nature conservation), and this requires ongoing coordination and exchange, also across the border.

Figure 2.4: Change in settlement areas (2012-2018) (comparison)



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2.1.2 Accessibility of the border area

This sub-dimension illustrates the functional travel connections that already exist in the border region. It examines average cross-border travel times for different modes of transport and cross-border catchment areas based on mobility flows. It also considers travel times to and from border crossings. The analysis shows whether mobility flows are integrated between border regions or if the border hampers mobility.

2.1.2.1 Comparative quality of selected cross-border connections

Indicator description

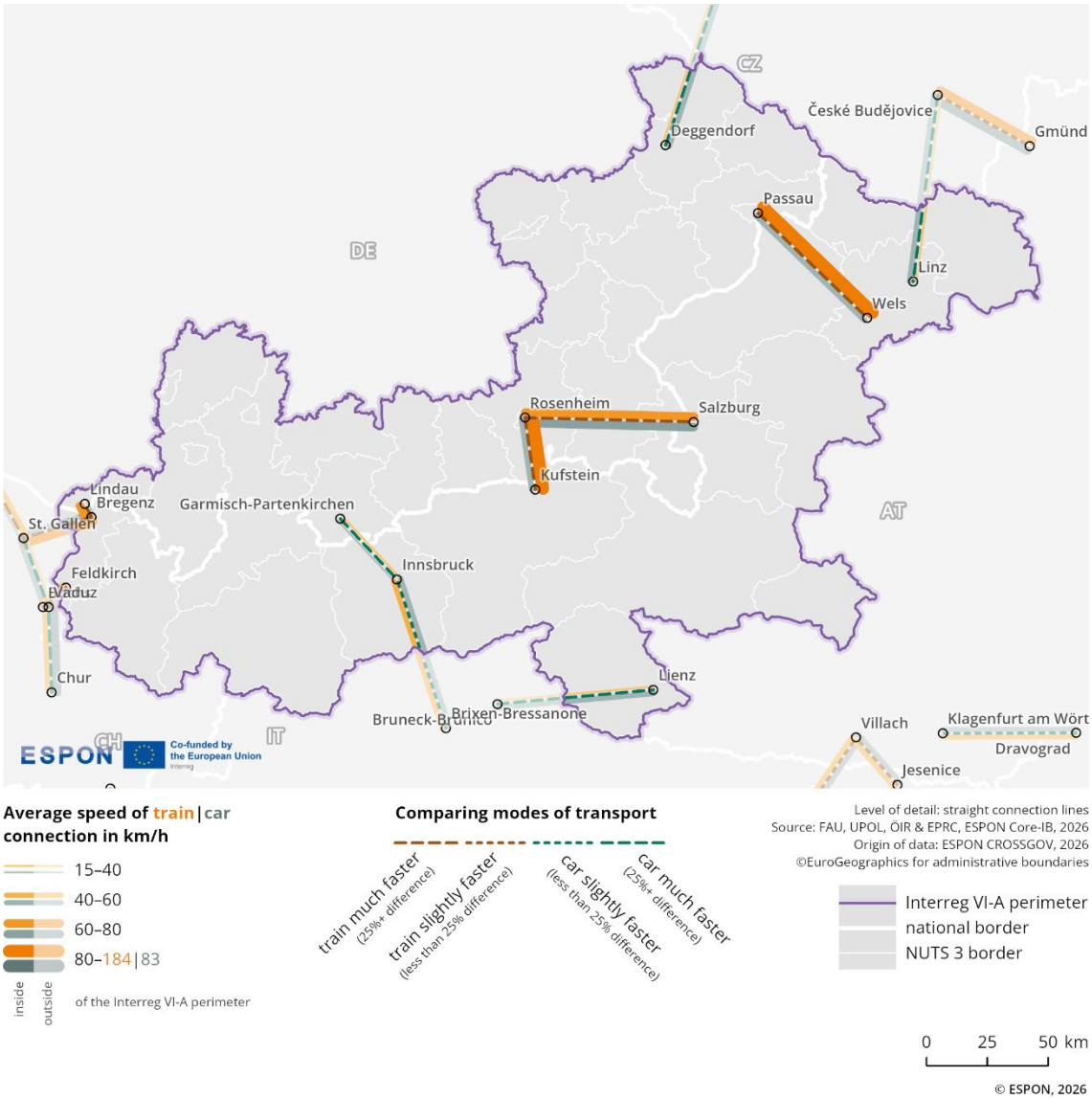
The indicator presents a comparative perspective for different modes of transport (public and private) and their average travel speed (so-called space-time-lines). As such it helps to understand and interpret accessibility patterns along the border and highlights the comparative quality of selected cross-border connections.

- **Source/method of retrieval**: Average number and speed of rail connections/ferries, average speed of car connections between selected cities and towns in border regions using Rail Travel Sites, Google Maps, luftlinie.org, Direct Ferries, local ferry companies
- **Temporal coverage**: 2025 (first quarter)
- **Unit**: km/h

Please refer to the technical annex for more information.

Cross-border accessibility shapes cross-border interactions. Figure 2.5 illustrates this using a "space-time-line" map, which shows parts of a European overview of car and train travel times in the Austria–Germany/Bavaria border region. This visualisation enables an assessment of transport quality by highlighting differences between public (train) and private (car) transport modes.

Figure 2.5: Comparative quality of selected cross-border connections



The selection of cities and connections covered is based on a set of criteria applied throughout Europe within the ESPON CROSSGOV project[4]. These criteria include the presence of a railway station, population size, distance to the border, node hub and functionality. The thickness of the lines (orange for trains, grey for cars) indicates the average speed of connections in km/h, with thicker lines representing faster connections. Dotted lines in-between reflect the indexed ratio between train and car speeds. A brown colour scale (values below 100) denotes that trains are faster than cars along the specific route, while a green scale (values above 100) indicates the opposite.

The selected connections within the programme area include Lindau–Bregenz, Garmisch-Partenkirchen–Innsbruck, Rosenheim–Kufstein, Rosenheim–Salzburg, and Passau–Wels. For most of these routes, namely Lindau–Bregenz, Rosenheim–Kufstein, Rosenheim–Salzburg, and Passau–Wels, train connections outperform car travel in terms of speed. Notably, the Rosenheim–Salzburg connection also offers a relatively fast car option. In contrast, the Garmisch-Partenkirchen–Innsbruck route is characterised by slow travel times for both train and car, although the car remains significantly faster than the train.

[4] ESPON CROSSGOV Atlas, see Storymap on 'Space-time-lines': https://gis-portal.espon.eu/arcgis/apps/storymaps/collections/345c978adf784ad-fac30c16b90219d35?item=4

2.1.2.2 Cross-border catchment area based on mobility flows

Indicator description

This indicator measures the movement of people across borders. The density of cross-border movements by Twitter/X users is displayed on a grid cell covering an area of 20x20 km. The indicator does not differentiate between reasons for movement.

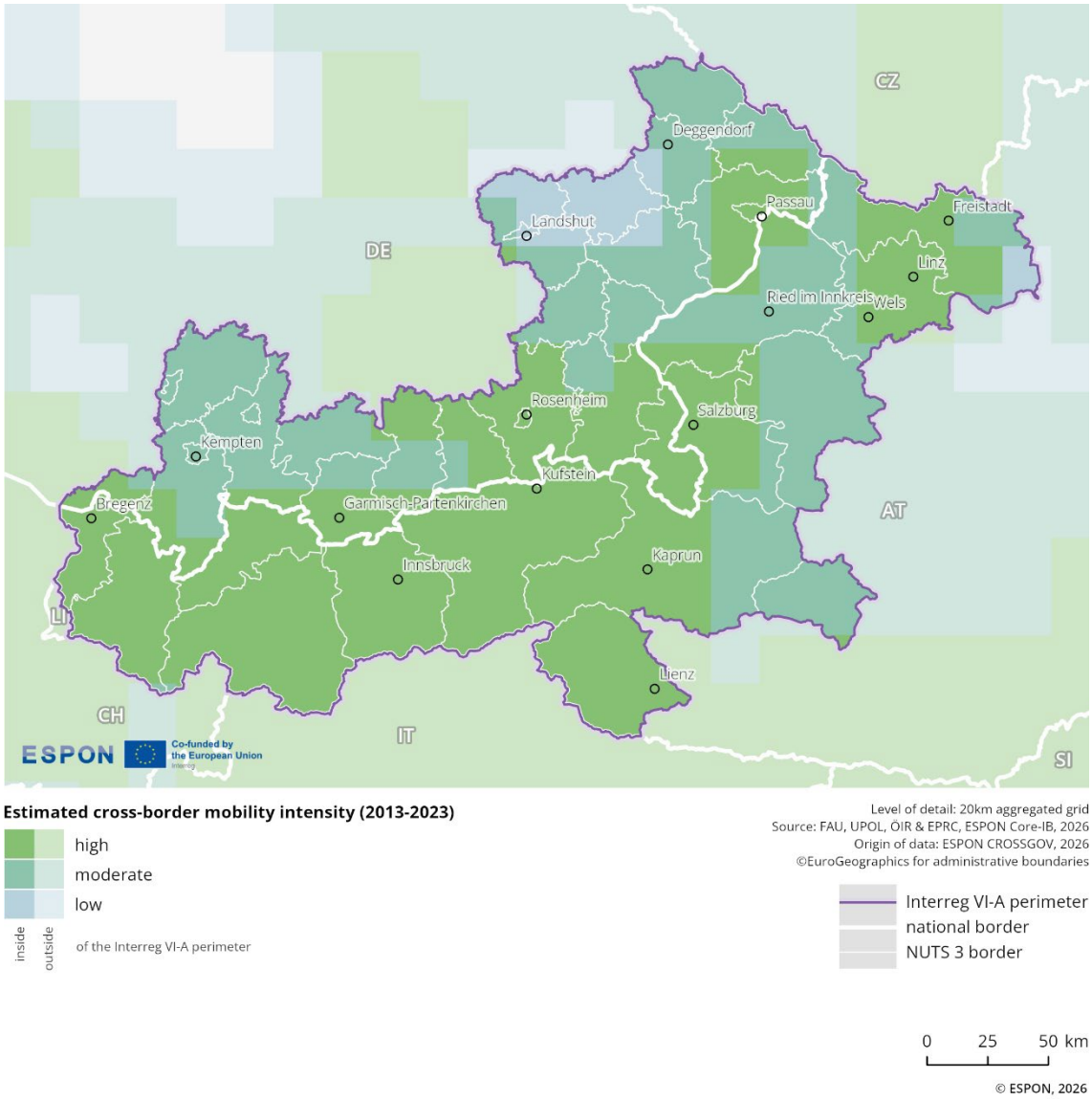
- **Source/method of retrieval**: The indicator is calculated based on Twitter (currently X) data. The digital footprint of individual users provides information about physical mobility flows and is used to calculate cross-border catchment areas of different intensity.
- **Temporal coverage**: 2013-2023
- **Unit**: n/a

Please refer to the technical annex for more information.

Figure 2.6 shows the cross-border catchment area in the border region based on mobility flows from 2013 to 2023, highlighting estimated cross-border mobility intensity across 3 different quartiles. The first quartile represents the 25% highest mobility intensity shown in dark green, the second quartile represents 25-50% coloured in green-blue, and the third quartile represents 50-75% in light blue.

The intensity of cross-border mobility of people within this cross-border region is relatively homogeneous. The highest levels of mobility intensity are recorded across a substantial portion of the region, particularly around cities such as Innsbruck, Salzburg, Passau, Linz, and others. Moderate intensity values can be found in the area surrounding the city of Kempten, as well as in parts of the eastern region. Low levels of cross-border mobility intensity are observed in the vicinity of the city of Landshut.

Figure 2.6: Cross-border mobility intensity



2.1.2.3 Cross-border travel-time accessibility

Indicator description

The indicator shows the time it takes to travel from any location within a region to the next border crossing, using grid data and subsequent categorisations into accessibility groups of 30, 60 and 90 minutes. It reflects the accessibility in cross-border areas, considering road transport. The indicator can describe the quality and speed of road connections and thus spatial reach of the cross-border services.

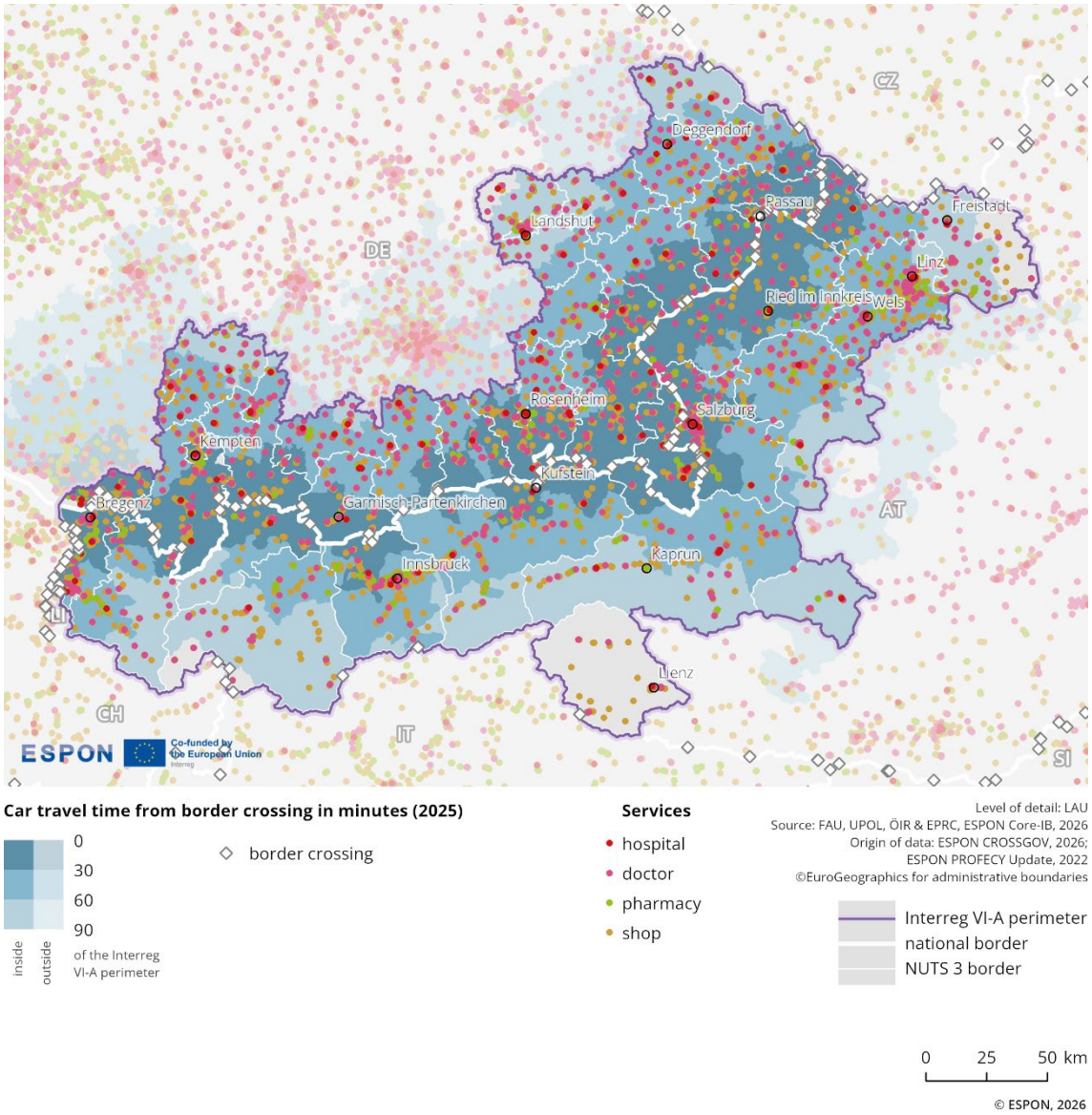
- **Source/method of retrieval**: Based on the OpenStreetMap road network, the travel time to the border is calculated for a grid of the border are. Based on this, areas are calculated within which border crossings can be reached below thresholds of 30, 60 and 90 minutes. As additional visual element, key services pharmacies, doctors, hospitals and shops (retrieved from the ESPON PROFECY project) are displayed and categorised into the accessibility groups.
- **Temporal coverage**: 2025 (first quarter, for accessibility data), 2021 (for service facility data)
- **Unit**: Minutes

Please refer to the technical annex for more information.

Figure 2.7 illustrates cross-border travel time accessibility in the Interreg area, showing the time distance from the national border in 2025. The legend indicates 3 travel time categories in minutes (30, 60, 90) represented by different shades of blue. In addition, it marks the location of services, including hospitals, doctors (general practitioners), pharmacies, and shops (supermarkets and conventient stores), with distinct coloured symbols.The map shows that along nearly the entire cross-border, the travel accessibility is under 30 minutes. There is only one part near Innsbruck where the region has worse accessibility in the category below 60 minutes on both sides. Most of the German regions fall into the first 2 categories of accessibility within 30 or 60 minutes. In the case of the Austrian border region, accessibility is more varied, with more distant areas falling into the 90-minute category. The 30-minute accessibility zone is more continuous and wider on both sides of the eastern part of the cross-border than on the western part. Time distances indicate a nearly good road network and accessibility in cross-border areas.

Services such as shops, hospitals, doctors, and pharmacies are more evenly distributed in Germany than in Austria. Services are concentrated in the west around the city of Bregenz, with other significant service centres in Innsbruck, Salzburg, Passau and Linz, which is further from the border.

Figure 2.7: Travel-time accessibility from border crossings



2.1.3 Key messages on the territorial dimension

In this border area, common demographic and mobility trends support cross-border cohesion. With a population of 6.1 million and an average annual growth rate of 6.1% between 2014 and 2024, considerably higher than the EU average, the Austria-Germany/Bavaria border region is clearly experiencing significant demographic growth. Growth is slightly stronger on the Austrian side. However, the German side shows a more even population distribution, particularly outside the mountainous areas where Austrian settlement is limited to valley locations.

The region's main population hubs are urban centres such as Linz, Salzburg, Innsbruck and Passau. Further population growth is concentrated mainly in and around these cities, as well as along the Inn Valley and in areas close to the border (for example, between Salzburg and Passau). This spatial dynamic suggests functional similarities and pressures on land, housing and infrastructure, creating potential for cross-border coordination.

Accessibility is generally high, with cross-border travel times of under 30 minutes in most areas. Train connections outperform car travel on certain routes, such as Passau-Wels and Rosenheim-Salzburg, which highlights the strength of the infrastructure in these areas. Nevertheless, car travel still

dominates in areas with less connectivity, such as the route between Garmisch-Partenkirchen and Innsbruck, where geomorphological constraints reduce transport efficiency.

Access to services such as hospitals, shops and schools is more widespread and evenly distributed in Germany. In contrast, Austria exhibits greater centralisation, particularly in its western regions, mainly due to topographical reasons.

2.2 Economic dimension

The economic dimension includes analyses of gross domestic product, labour market conditions, competitiveness, and key infrastructure and housing indicators. The aim is to illustrate the impact of the border on economic performance, whether it acts as a barrier or a bridge, and the extent to which integration is supported by labour mobility, remote working, and infrastructure connectivity.

2.2.1 Gross Domestic Product

This sub-dimension illustrates the economic situation of the border region by analysing gross domestic product (GDP). It shows economic development within the border region and how this has changed over time. Comparisons with the respective countries and the EU average provide important context for understanding the region's dynamics.

2.2.1.1 Gross domestic product per capita at current market prices

Indicator description

The indicator shows the regional GDP/capita in current prices and its development over the past years. It highlights structural differences and similarities between the border region and the respective national figures as well as the European average. Furthermore, it highlights patterns within the border region, although has to be interpreted with care in the case of a strong presence of commuters.

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2010-2023
- **Unit**: Euro per capita

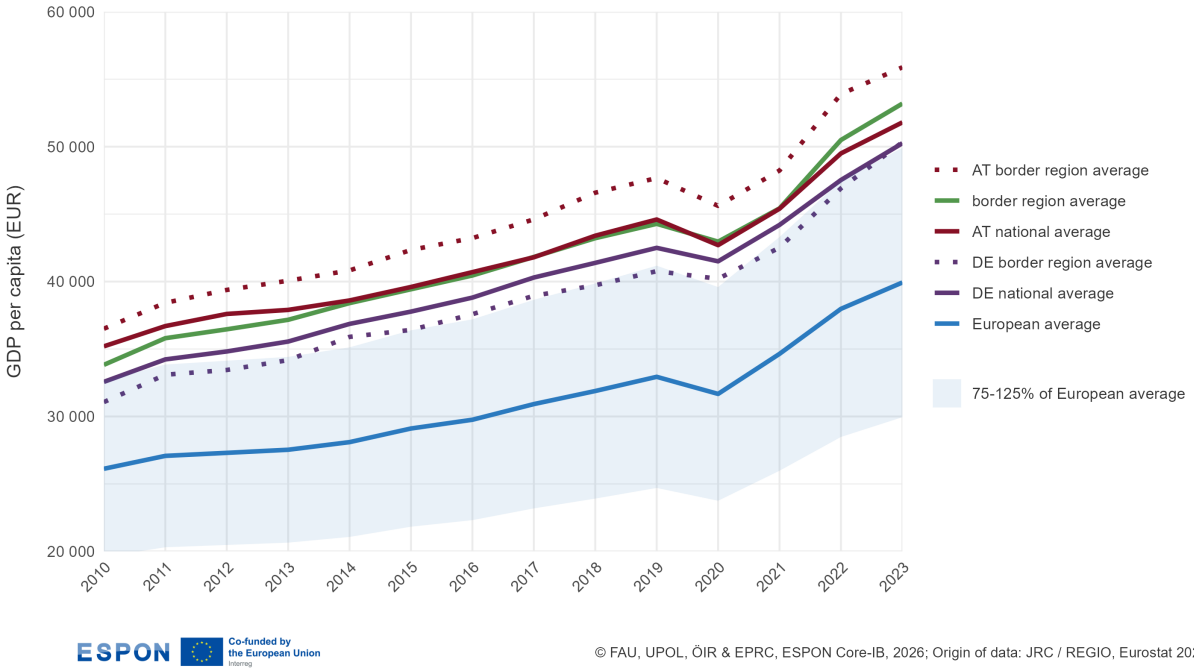
Please refer to the technical annex for more information.

In 2022, the border region's GDP per capita was 139.5% of the EU average and 141.6% of the average in European border regions (see Figure 2.8). Between 2014 and 2022, it grew by 32.1%, 3.6 percentage points less than the EU average and 3.1 percentage points less than the average for European border regions[5].

Since 2010, GDP per capita has grown slightly more slowly than the EU average both nationally and in the border regions. Still, GDP per capita in the border regions on both sides remains above the EU average.

[5] Percentage changes are calculated using Eurostat data to ensure harmonised statistics from official sources. The latest year for which full coverage of all European regions is available on Eurostat is 2022. For visualisation purposes, ARDECO data has been used to enable longer time series to be visualised by filling the official dataset's existing gaps with model-based estimates. Therefore, slight deviations between the calculation and visualisation are possible.

Figure 2.8: Gross domestic product at current market prices (per capita)



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2.2.2 Labour market and commuting

This sub-dimension highlights the existing and potential functional links within the labour market of the border region. It examines the employment situation and commuting patterns, as well as the role of telework agreements, and considers developments over time based on analysed indicators. The analysis identifies factors that facilitate or hamper cross-border labour market integration.[6]

[6] See also: European Commission 2024: Cross-Border Regional Labour Market Analysis, https://op.europa.eu/s/AazM

2.2.2.1 Share of employment

Indicator description

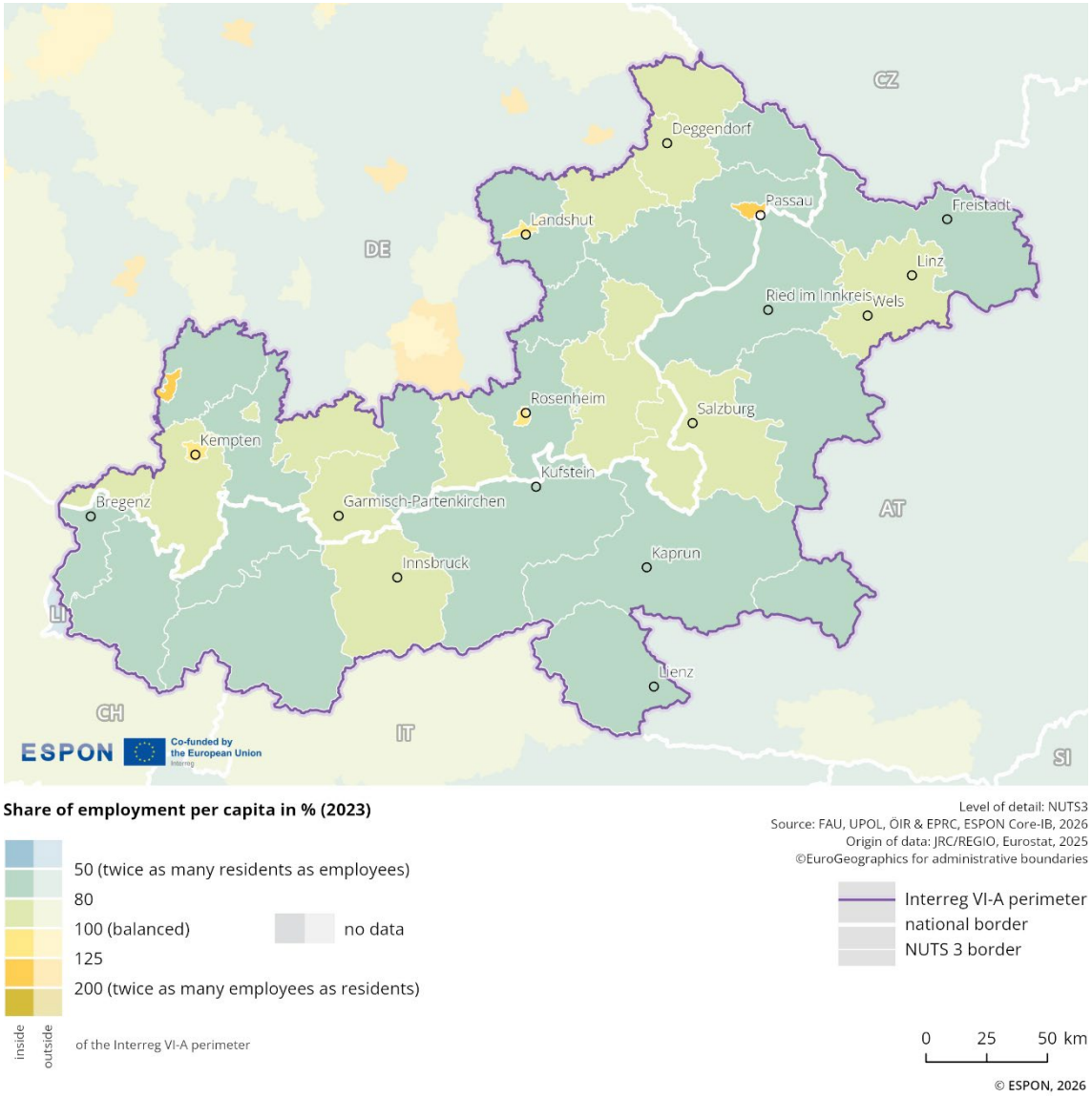
This indicator shows the share of employees in the population aged 15 to 64. Although it does not fully capture entrepreneurs, marginal employees, or civil servants, this is an important statistic for understanding general labour market patterns. It covers 2 aspects: first, high values can result from a high proportion of the resident population being employed. Second, high values can result from a high number of incoming commuters (from other NUTS3 regions within the country or from neighbouring countries). The same arguments apply to low values: they may indicate low levels of employment, or they may result from high shares of outgoing commuters. Values of more than 100% are possible, since the number of incoming commuters can exceed the number of inhabitants aged 15 to 64 (including both domestic and cross-border commuters).

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Share in %

Please refer to the technical annex for more information.

Figure 2.9 illustrates the share of employment per capita in the population aged 15 to 64 in 2023. The data are categorised into ranges from below 50% (twice as many residents aged 15 to 64 as employees) to above 200% (twice as many employees as residents aged 15 to 64), with 100% representing a balanced ratio. Blue or green-coloured regions indicate more residents aged 15 to 64 than employees, while yellow regions indicate more employees than residents aged 15 to 64.

Figure 2.9: Employment share[7]



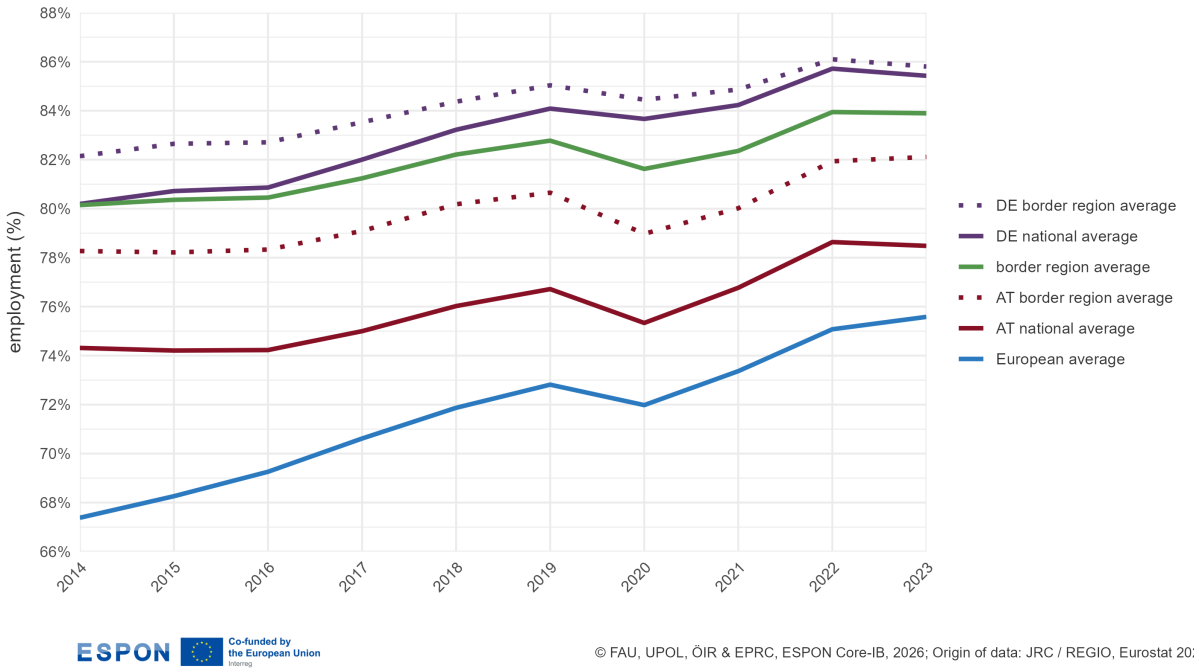
The share of employment in this border region is stable, with the regional average at 83.89% in 2023, representing an increase of 3.75 percentage points since 2014. Due to similar indicator values on both sides of the border, differences between the individual countries are not apparent. In the Austrian part values of the share of employment mostly fall within the 50–100% range, with a similar situation observed in the German part. Values between 100% and 200% occur around the cities of Rosenheim, Landshut, Kempten, Memmingen and Passau. When comparing the share of employment in this border region with broader averages, the situation is as follows (see Figure 2.10):

- Compared to the European average, values in the cross-border region are higher by 8.3 percentage points; in 2014, the difference was 12.8 percentage points.
- Compared to the Austrian national average, values in the cross-border region are higher by 5.4 percentage points, whereas in 2014, the difference was 5.8 percentage points.
- Compared to the German national average, values in the cross-border region are lower by 1.5 percentage points; in 2014, the difference was 0.1 percentage points.

[7] Note: In this map, 'residents' refers to the population aged 15 to 64.

- The Austrian border area achieves values 3.6 percentage points higher than the Austrian national average, while the German border area exceeds the German national average by 0.4 percentage points.
- Compared to the average of all cross-border regions, values are higher by 9.5 percentage points; in 2014, they were higher by 13.9 percentage points.

Figure 2.10: Employment share over time (comparison)



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2.2.2.2 Share of working-age population

Indicator description

This indicator shows the share of people aged 15 to 64 in the total population, reflecting the potential working-age population. The population counted includes all residents who live in the country permanently, excluding foreign students and military personnel. Using the 15–64 age range is a standard European statistical proxy, since differences in retirement age or labour participation across countries cannot be captured systematically. It allows for regional differentiation of potential workforce throughout the border region.

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Share in %

Please refer to the technical annex for more information.

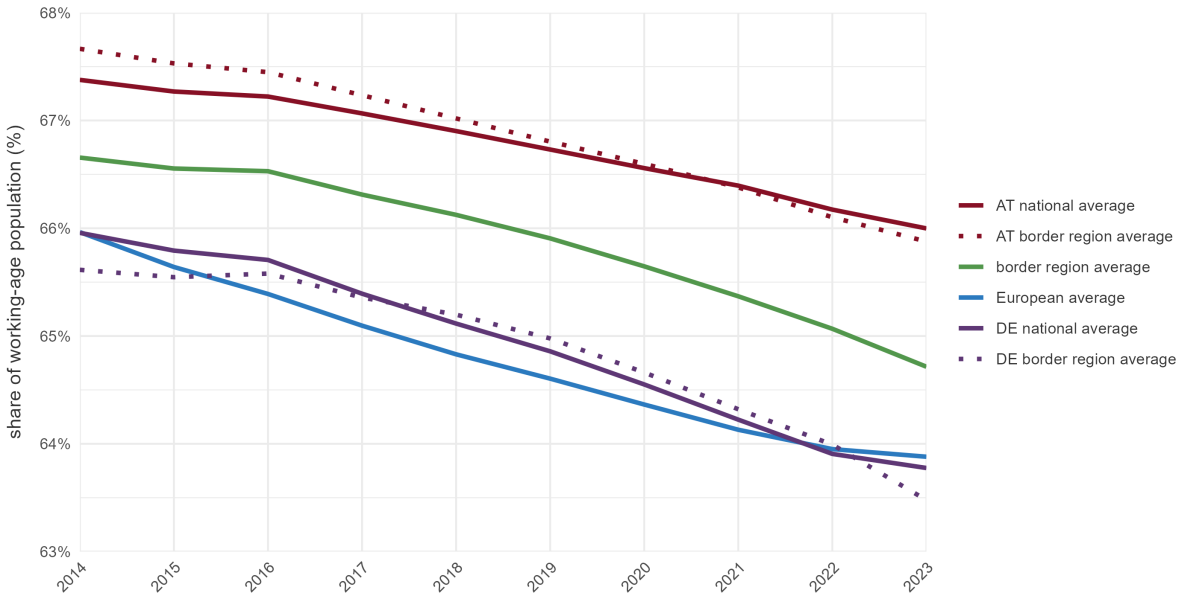
Figure 2.11 illustrates the evolution of the share of the working-age population in the Austria-Germany/Bavaria region between 2014 and 2023. In 2023, the cross-border region shows an average working-age population share of 65.9%, compared to the European average of 63.9% and 63.7% for the average of all cross-border regions.

The share of the working-age population in the overall cross-border region is nearly identical compared to both the Austrian border region average (65.9%) and the Austrian national average (66.0%). In parallel, it is slightly higher than the German border region average (63.5%) and the German national average (63.8%).

The region experienced a 3.0 percentage point decrease in the share of working-age population between 2014 (67.7%) and 2023 (64.7%). This decline is similar to the European average decrease of 2.1 percentage points over the same period. The Austrian border average experienced a decrease of 1.8 percentage points in the share of working-age population, falling from 67.7% (2014) to 65.9% (2023). Compared to the Austrian national average, which dropped by 1.4 percentage points (from 67.4% to 66.0%), the Austrian border area shows a slightly smaller decline. The German border area experienced a more pronounced decrease of 2.1 percentage points, from 65.6% (2014) to 63.5% (2023), and a national German average decline of 2.2 percentage points (from 66.0% to 63.8%).

Overall, both the Austrian and German border areas exhibit a declining trend in the share of the working-age population, although the Austrian border area consistently remains above the German border average and the European average.

Figure 2.11: Share of working-age population over time (comparison)



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2.2.2.3 Employment by sector

Indicator description

The indicator differentiates the number of jobs in a region by sector. This indicator focuses on workplace-based employment, providing insight into the employment landscape of a region. The dataset can be disaggregated according to "10-sector" NACE (Nomenclature statistique des activités économiques dans la Communauté européenne) classifications, allowing for detailed analysis of employment distribution across various industries.

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Share in %

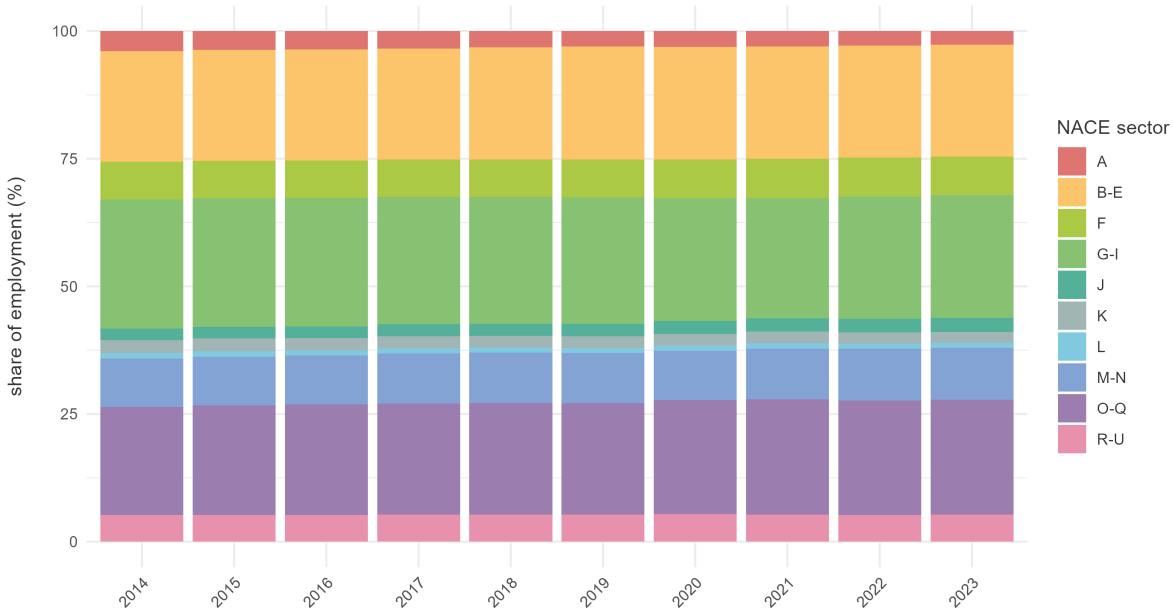
Please refer to the technical annex for more information.

Figure 2.12 illustrates the relative number of jobs in the border area differentiated by sectors. It shows where jobs are located (not where employed persons live). This workplace-based indicator offers insight into the employment structure of a region.

The dataset uses a '10-sector' classification based on NACE categories. The sectoral breakdown is as follows:

- A: Agriculture, forestry and fishing
- B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
- F: Construction
- G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
- J: Information and communication
- K: Financial and insurance activities
- L: Real estate activities
- M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
- O-Q: Education (O), Human health and social work activities (Q)
- R-U: Arts, entertainment and recreation R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

Figure 2.12: Employment by sector (comparison)



A: Agriculture, forestry and fishing
B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
F: Construction
G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
J: Information and communication
K: Financial and insurance activities
L: Real estate activities
M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
O-Q: Education (O), Human health and social work activities (Q)
R-U: Arts, entertainment and recreation (R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

Between 2014 and 2023, the relative number of jobs in the different sectors remains fairly stable. There is a slight decline in the share of employment in agriculture, forestry and fishing (A), wholesale and retail trade; repair of motor vehicles and motorcycles (G), transportation and storage (H), accommodation and food service activities (I). Conversely, there is a modest increase in the number of jobs in professional, scientific and technical activities (M), administrative and support service activities (N), education (O) and human health and social work activities (Q).

Over the entire period, the sectors with the highest share of jobs are 'B-E' (mining, quarrying, manufacturing, electricity, gas, steam and air conditioning supply, water supply; sewerage, waste management and remediation activities, 'G-I' (wholesale and retail trade; repair of motor vehicles and motorcycles, transportation and storage, accommodation and food service activities) and 'O-Q' (education, human health and social work activities).

2.2.2.4 Outgoing cross-border commuters

Indicator description

The indicator shows outgoing cross-border commuting dynamics at NUTS3 level. Even though no origin-destination information can be provided, it is assumed that commuters primarily travel across the nearest border. Spatial, economic and population arguments are combined to calculate the number of outgoing cross-border commuters.

- **Source/method of retrieval**: Eurostat/LFS data on outgoing commuters currently available on NUTS2 level has been regionalised for NUTS3 by means of weighting by border length, NUTS3 population-weighted centroid distance to border, population per NUTS3 region (15–64 years old) and real compensation per employee
- **Temporal coverage**: 2015-2023
- **Unit**: Share in %

Please refer to the technical annex for more information.

Commuting is one of the most relevant cross-border flows to identify functional linkages. Figure 2.13 illustrates the share of outgoing commuters per capita for each NUTS3 region (more concretely speaking the share of outgoing commuters among the residential population of the age group 15-64 years old, resembling the potential labour force). Origin-destination information cannot be provided, but the share of outgoing commuters in regions close to the border indicates the relevance of commuting. It highlights functional relations in the labour market within the cross-border region.

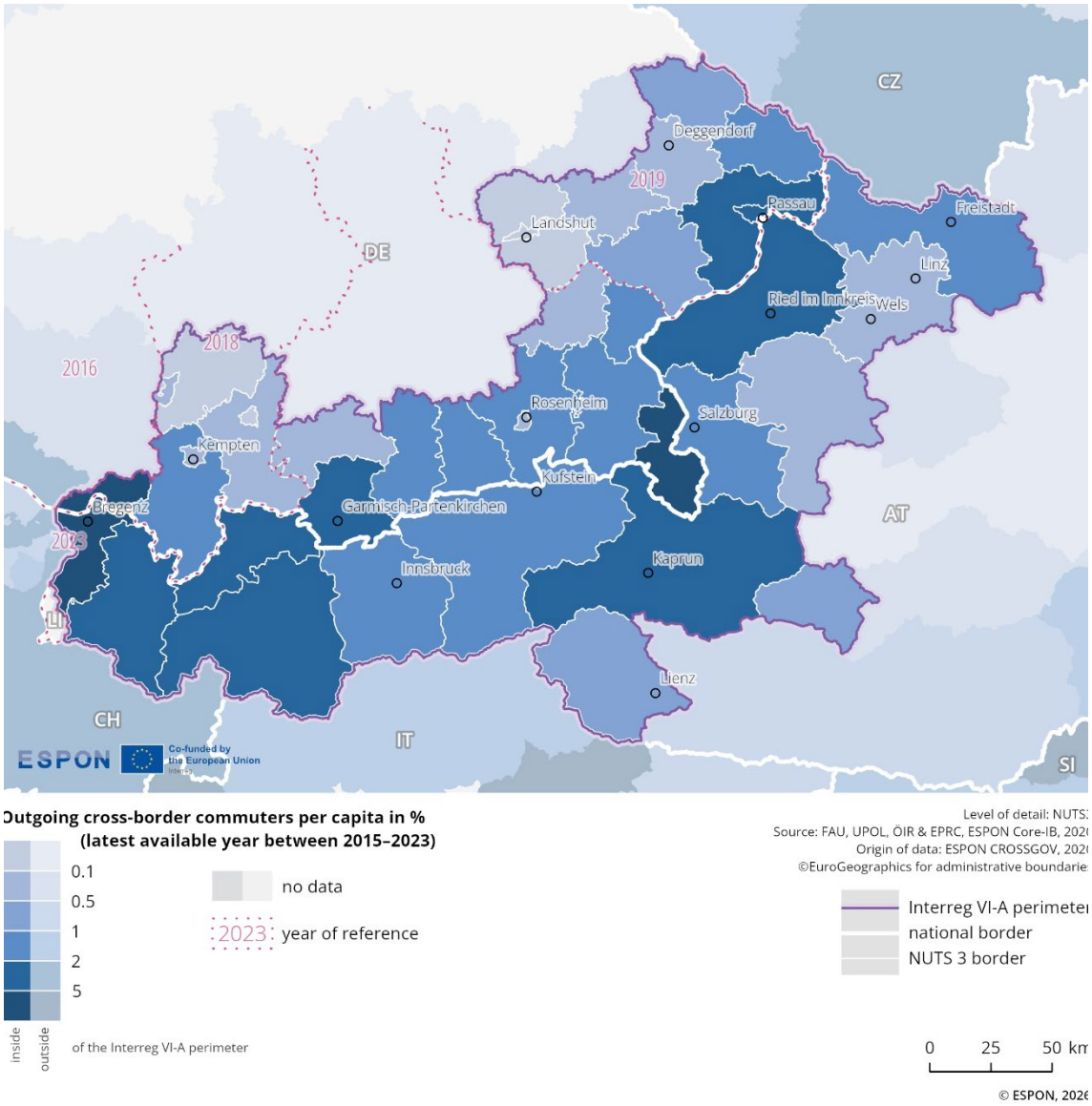
The map illustrates the share of cross-border commuters, based on the most recent available data. It shows relatively strong and evenly distributed cross-border commuting activity in areas directly adjacent to the border on both the Austrian and German sides.

The Salzburg–Freilassing area stands out in particular, with high levels of outgoing commuters in Berchtesgadener Land (Germany), highlighting the important role of this region as a commuting corridor[8]. The same is true for the Lindau (Bodensee) and the Rheintal–Bodenseegebiet at the western side of the border.

Other 'hotspots' include, on the Austrian side, the regions of Bludenz–Bregenzer Wald, Außerfern, Tiroler Oberland, Innviertel, and Mühlviertel, as well as, on the German side, Passau (Kreisfreie Stadt and Land). These NUTS3 regions also show elevated shares of cross-border commuters per capita.

[8] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

Figure 2.13: Outgoing cross-border commuting patterns



2.2.2.5 Cross-border telework agreements

Indicator description

The indicator shows what kind of legal framework for cross-border telework is enacted.

- **Source/method of retrieval**: The indicator is based on information about the legal framework for social security regarding cross-border teleworking, categorised by border pair.
- **Temporal coverage**: Status as of March 2025
- **Unit**: n/a

Please refer to the technical annex for more information.

The 2 countries involved in the programme are signatories of the 2023 Framework Agreement on Cross-Border Telework. Under this agreement, cross-border workers can telework from their country of residence for up to 50% of their total working time without affecting their social security affiliation.

2.2.3 Competitiveness

This sub-dimension illustrates the competitiveness of the border region by analysing the main industry sectors that contribute to its economic development. It assesses gross value added (GVA) at basic prices by sector, as well as nominal compensation per hour worked, in order to understand productivity levels and sectoral strengths.

2.2.3.1 Gross value added at basic prices by sector

Indicator description

The indicator shows the gross value added (GVA), which is a measure of the contribution of a country or region to the economy. Regional GVA represents the value generated by all units involved in the production of goods and services within a specific area. This indicator can be disaggregated by industry and service sector, allowing for a detailed analysis of economic contributions across different fields. Additionally, the sum of GVA across all industries or sectors, combined with taxes on products and minus subsidies on products, yields the gross domestic product (GDP) of the region. The dataset is available in "10-sector" NACE classifications, facilitating comprehensive evaluations of the regional economy.

- **Source**: Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Million purchasing power standards (PPS)

Please refer to the technical annex for more information.

Figure 2.14 visualises gross value added (GVA), which is an important indicator of economic activity. GVA measures the value created by all economic activities involved in producing goods and services in a specific area. It is differentiated by sectors to provide detailed insights into the economic contributions of different fields.

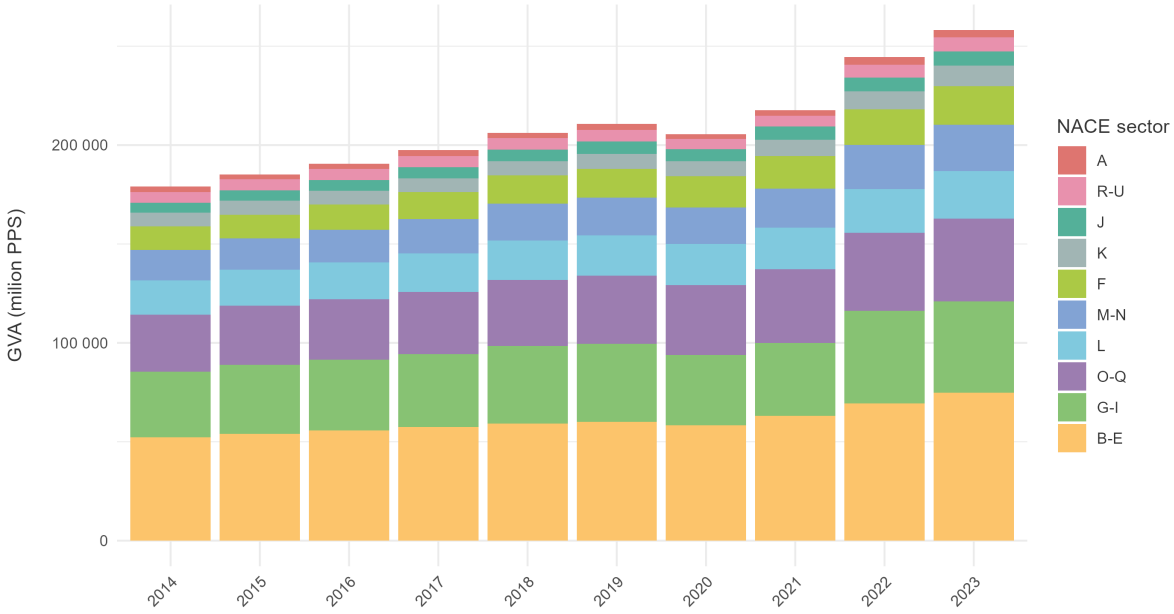
The dataset uses a '10-sector' classification based on NACE categories. The sectoral breakdown is as follows:

- A: Agriculture, forestry and fishing
- B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
- F: Construction
- G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
- J: Information and communication
- K: Financial and insurance activities
- L: Real estate activities
- M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
- O-Q: Education (O), Human health and social work activities (Q)

› R-U: Arts, entertainment and recreation R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

Between 2014 and 2023, the GVA in the border area of Austria-Germany/Bavaria increased from 179,025 million purchasing power standards (PPS) to 258,131 million PPS, a growth of 44%. Sector groups B–E, G–I, and O–Q together make up over half of the total GVA, highlighting their significant contribution to the regional economy within the border area. The sector groups B–E contributed the largest share, with a total of 74,806 million PPS in 2023. This underlines the significance of sectors such as Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E) in the Austria–Germany/Bavaria border region.

Figure 2.14: Gross value added at basic prices by sector (comparison)



A: Agriculture, forestry and fishing
B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
F: Construction
G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
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L: Real estate activities
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O-Q: Education (O), Human health and social work activities (Q)
R-U: Arts, entertainment and recreation (R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

2.2.3.2 Nominal compensation per hour worked

Indicator description

The indicator shows the average income paid for each hour worked, known as compensation per hour worked. This measure is calculated by dividing the "compensation of employees at current prices" by the total number of "hours worked (employees)." Employees, in this context, are defined as individuals engaged by contract in productive activities for a resident unit, receiving remuneration irrespective of their place of residence. The total hours worked is considered the most appropriate measure of labour input, representing the aggregate number of hours actually worked by employees. This indicator provides valuable insights into labour productivity and wage dynamics within the economy.

- **Source**: Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2023 (missing data from 2023 in Switzerland were supplemented by values from 2022)
- **Unit**: Euro

Please refer to the technical annex for more information.

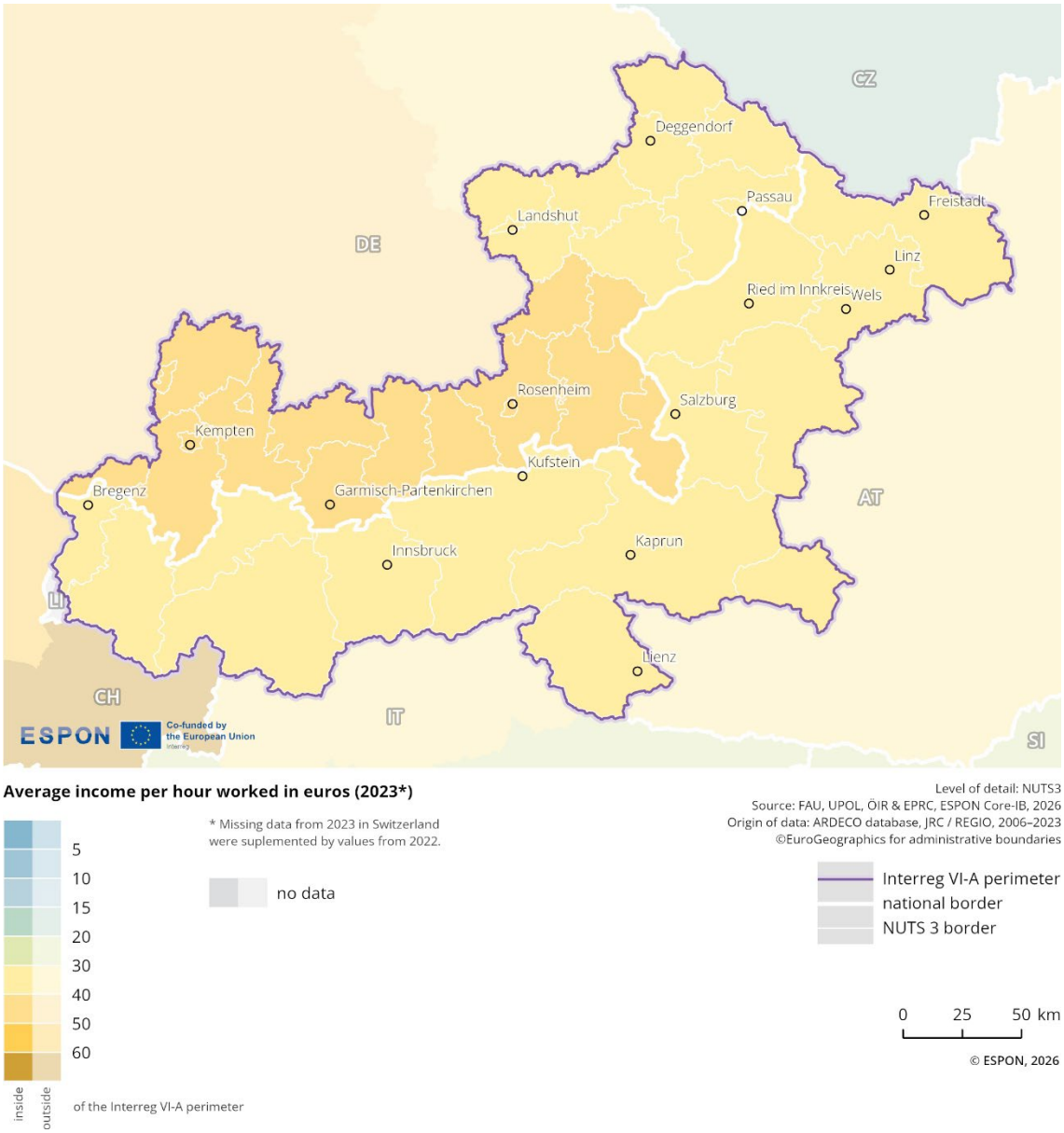
Figure 2.15 shows the average values for the 'compensation per hour worked'. This indicator is calculated by dividing the total compensation of employees (at current prices) by the total number of hours worked by those employees. In this context, 'employees' are defined as individuals engaged by contract in productive activities. The data is available for the place of work, regardless of the place of residence. Total hours worked represent the actual number of hours worked by employees and are considered the most accurate measure of labour input.

In 2023, the nominal compensation per hour worked in the Austria-Germany/Bavaria border region appears to be distributed relatively evenly. In most areas of the cross-border region, the average hourly income ranges between €30 and €40. Several German NUTS3 regions report slightly higher values, e.g. Altötting and Weilheim-Schongau (€48.9)[9]. To contextualize the regional pattern shown in the figure, it is noteworthy that the national average hourly compensation reaches €39.40 in Germany and €37.90 in Austria, which helps situate the border region within national labour productivity context.

Cross-border wage differences can encourage labour migration from lower-wage areas to more economically prosperous neighbouring regions, creating both opportunities and challenges for local labour markets and social systems. However, in this particular border region, the wage differences do not appear to be especially significant.

[9] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

Figure 2.15: Average income per hour



2.2.4 Infrastructure and housing

This sub-dimension shows the impact of the border on infrastructure and housing in the region. It assesses housing prices and average internet speed in order to identify cross-border effects, including potential price spillovers and disparities. The analysis reveals whether infrastructure and housing markets facilitate integration or expose structural challenges that are specific to the border area.

2.2.4.1 Advertised sales prices

Indicator description

The indicator shows the advertised sales price per square meter for houses/appartements as retrieved from commercial real estate websites at national level. In the cross-border region, local differences between average sales prices are highlighted and the "cutting" effect of the border and its influence on price levels is visualised.

- **Source/method of retrieval**: Processed ESPON House4all data. The original data is collected via web-scraping of national listing websites over a one-year period.
- **Temporal coverage**: 2024/2025
- **Unit**: Average price per square meter (€/m^2)

Please refer to the technical annex for more information.

Figure 2.16 illustrates the advertised sales price of housing in 2025 across the border region. The data are categorised into ranges of average housing price per square metre, from below 250 €/m² up to more than 8,000 €/m², shown in colours ranging from purple and blue to green, yellow and orange.

Lower prices are found in the eastern part, where values drop below 2,000 €/m². The average advertised sales price in the German part of the border region is around 3,417 €/m², while in the Austrian part it is about 3,704 €/m². The overall average for the entire border region is 3,586 €/m², which is considerably higher than the average across all evaluated EU border regions (1,900 €/m²). In certain municipalities, prices reach and exceed the European average of 5,600 €/m².

Figure 2.16: Advertised housing prices

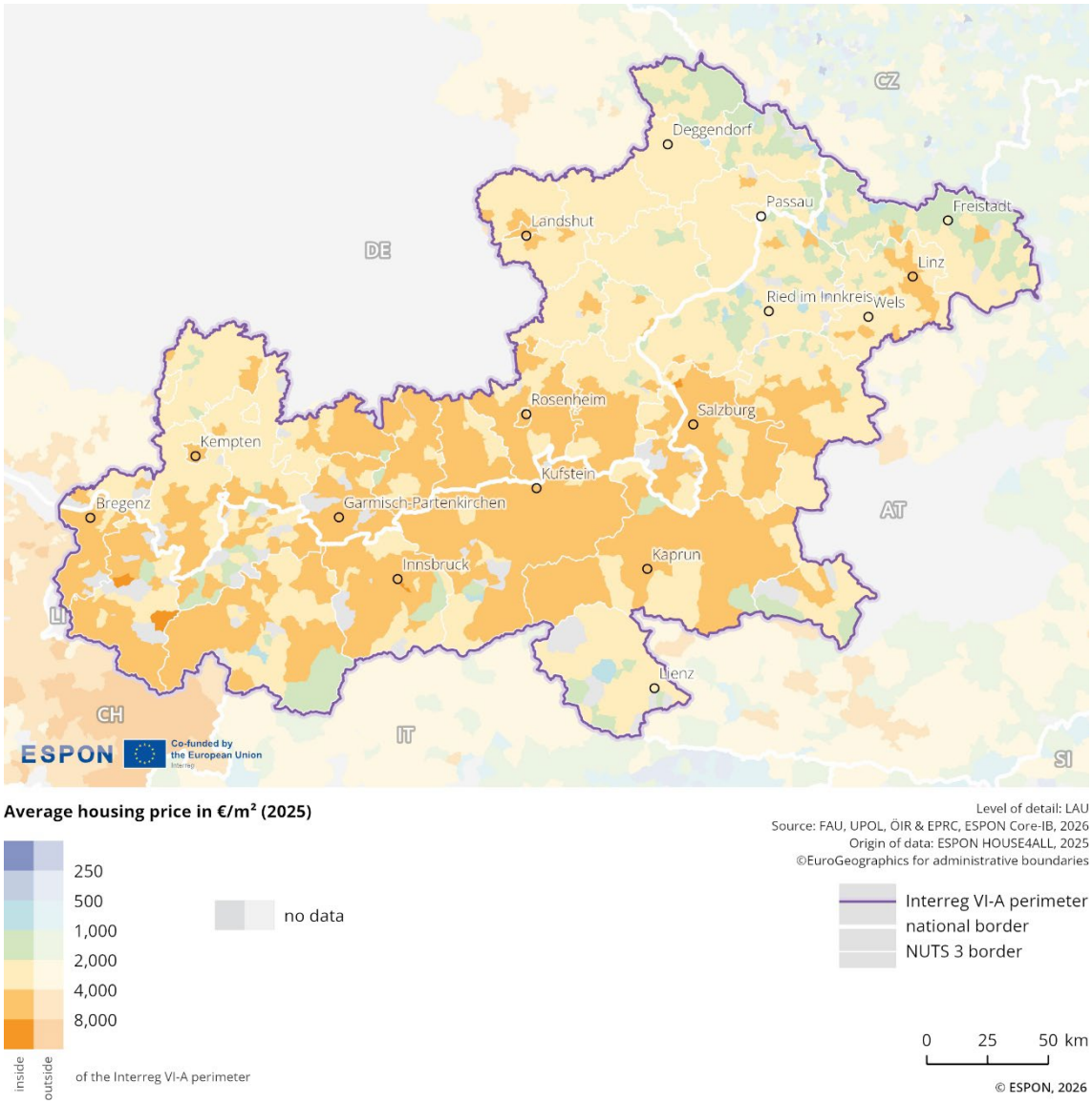
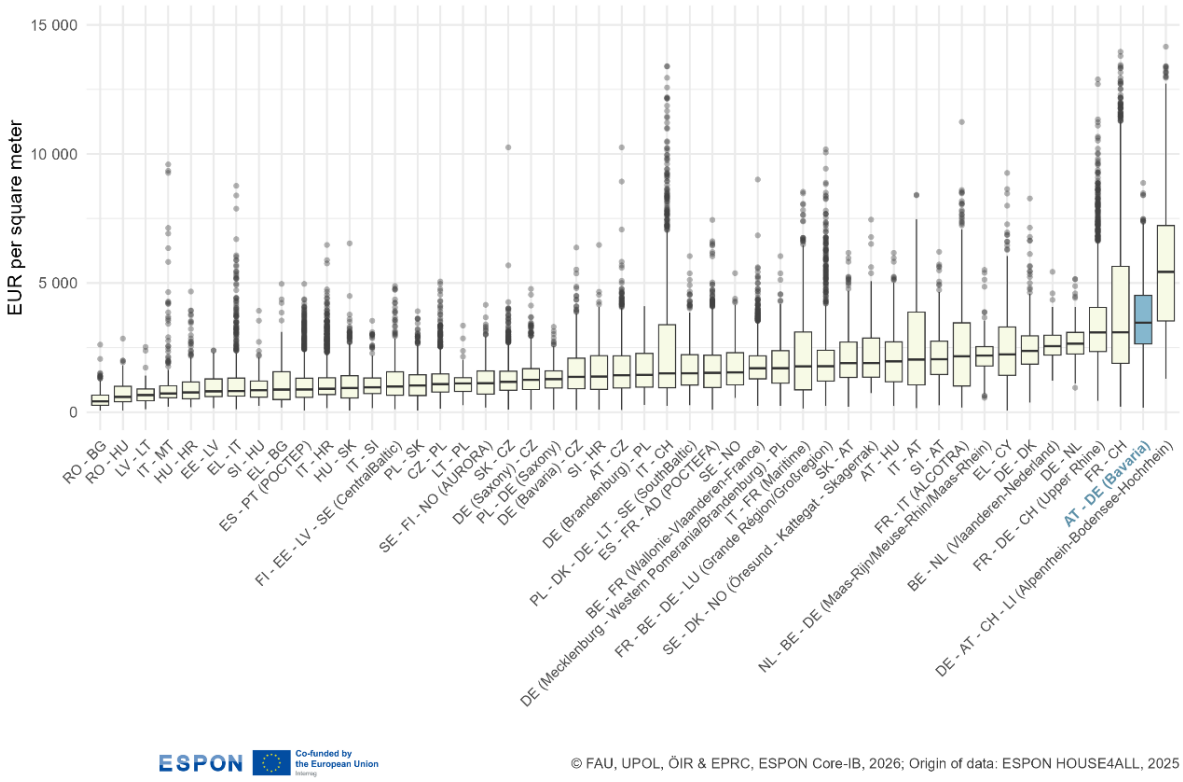


Figure 2.17 illustrates the distribution of sales prices across municipalities within the border area. The relatively large interquartile range (IQR, represented by the box) indicates substantial variation, highlighting pronounced spatial disparities in sales prices. The boxplot also displays extreme values (shown as individual dots), with some municipalities recording prices of up to 8,000 €/m².

Figure 2.17: Advertised housing prices (comparison)



2.2.4.2 Average internet speed

Indicator description

The indicator shows the population weighted average internet speed available at municipal level. It highlights differences in the "digital preparedness". In border regions, this indicator is particularly relevant for identifying digital infrastructure gaps that may hamper balanced development and cross-border integration.

- **Source/method of retrieval**: Processing of data provided by Speedtest by Ookla Global Fixed and Mobile Network Performance Maps, based on Ookla's analysis of Speedtest Intelligence data.
- **Temporal coverage**: 2022
- **Unit**: Download speed in Mbps

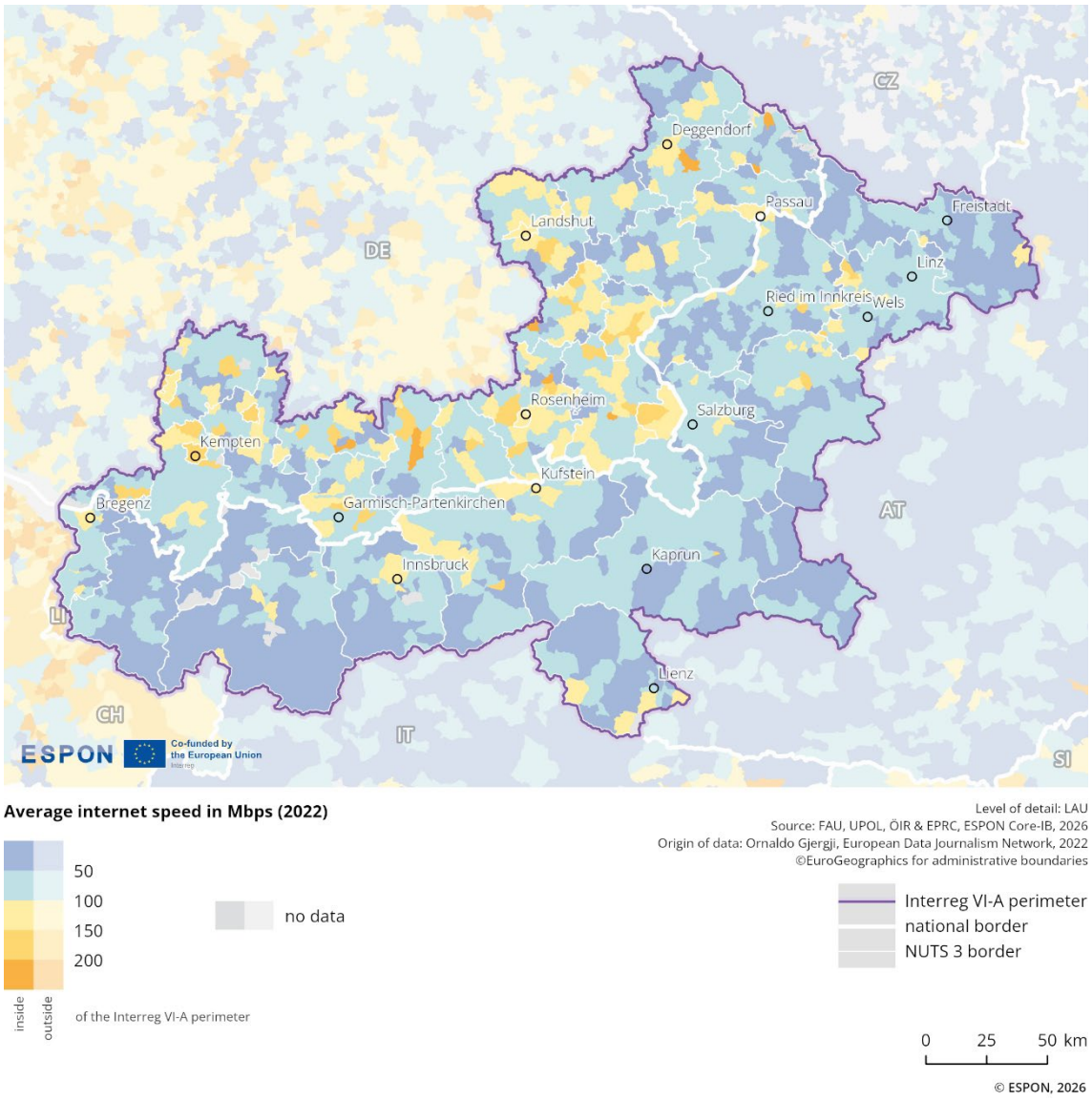
Please refer to the technical annex for more information.

Digitalisation is a highly relevant issue in European border regions, with the overarching objective of ensuring appropriate digital access. It is widely recognised as a key precondition for successful regional and economic development. A major challenge in this process is preventing 'digital divides', i.e., avoiding significant disparities in economic, social, and spatial terms.

Average internet speed is a telling indicator of such disparities, highlighting differences in 'digital preparedness' at the local level. Figure 2.18 shows the average download speed at the municipality level. The colour scheme ranges from dark blue (very slow speeds) to orange (very fast speeds). The data, prepared by OBC Transeuropa for EDJNet, is based on Speedtest Intelligence data from Speedtest/Ookla's Global Fixed and Mobile Network Performance Maps for the first quarter of 2022. The average download speeds are expressed in megabits per second (Mbps), not to be confused with megabytes per second (MBps).

Figure 2.18 reveals significant differences between urban and rural areas, with values ranging from under 50 Mbps to over 200 Mbps. Cities such as Innsbruck, Kufstein, Kempten, Rosenheim, Landshut, and Passau report relatively high average speeds, while the surrounding areas tend to have significantly lower values. This may be due to the greater return on investment typically associated with digital infrastructure projects in urban areas compared to rural ones. However, not all urban areas in this border region have high download speeds, for example, Salzburg, Linz, Lienz, and Garmisch-Partenkirchen do not stand out in this regard. Austria's mountainous terrain clearly poses a challenge to providing high-speed internet.

Figure 2.18: Average internet download speed



2.2.5 Key messages on the economic dimension

The border region has a strong overall economy, with a high GDP per capita (139.5% of the EU average in 2022) and stable employment levels (83.9% in 2023). However, GDP growth since 2014 has been slower than the EU and cross-border region averages, suggesting that strong performance is not leading to dynamic development.

Labour market indicators suggest relative stability, but also emerging vulnerabilities.[10] Then border region's employment rate is above the EU and Austrian averages, though it is slightly below the German national average. However, the working-age population is declining steadily on both sides of the border, in line with broader European trends. This demographic shift could impact the future labour supply and economic sustainability, particularly in rural parts of the border area.

Trends in sectoral employment and GVA show a gradual shift from traditional industries such as agriculture, trade and transport towards services, education and health. While this transition is in line with wider structural changes, it may also reflect uneven opportunities, as not all subregions are equally located to benefit from this shift.

Cross-border labour mobility, particularly in hotspots such as Salzburg-Freilassing and Passau, highlights functional integration. The 2023 cross-border telework agreement further supports flexible labour markets. However, mobility and telework depend on infrastructure, and here digital and transport disparities are evident. Urban areas have high internet speeds, whereas rural and mountainous areas have slower speeds. Similarly, while housing prices are broadly aligned across the border, they remain high compared to other EU regions, which could limit affordability and mobility.

The border region acts more as an economic bridge than a physical barrier. However, stronger integration and long-term resilience depend on tackling demographic decline, digital divides, and structural transformation.

2.3 Green dimension

The green dimension highlights the environmental characteristics, vulnerabilities and sustainability-related interactions within the border region. The analysis provides insight into the environmental interdependence of border regions. Additionally, the spatial distribution of renewable and conventional energy infrastructure, alongside indicators of resources and the circular economy, reveals whether the border facilitates collaborative transitions towards sustainability.

2.3.1 Nature protection and pollution

This sub-dimension investigates cross-border functional links in protected areas and areas affected by air and water pollution. It analyses the presence of protected areas in order to identify cross-border ecological links and conservation efforts. It also highlights the extent to which air and water pollution affects people living in border regions.

[10] See also: European Commission 2024: Cross-Border Regional Labour Market Analysis, https://op.europa.eu/s/AazM

2.3.1.1 Protected areas

Indicator description

The indicator shows the presence and territorial coverage of protected areas based on the combination of 3 data sources, i.e., Nationally designated areas, Natura 2000 Network and Emerald Network.

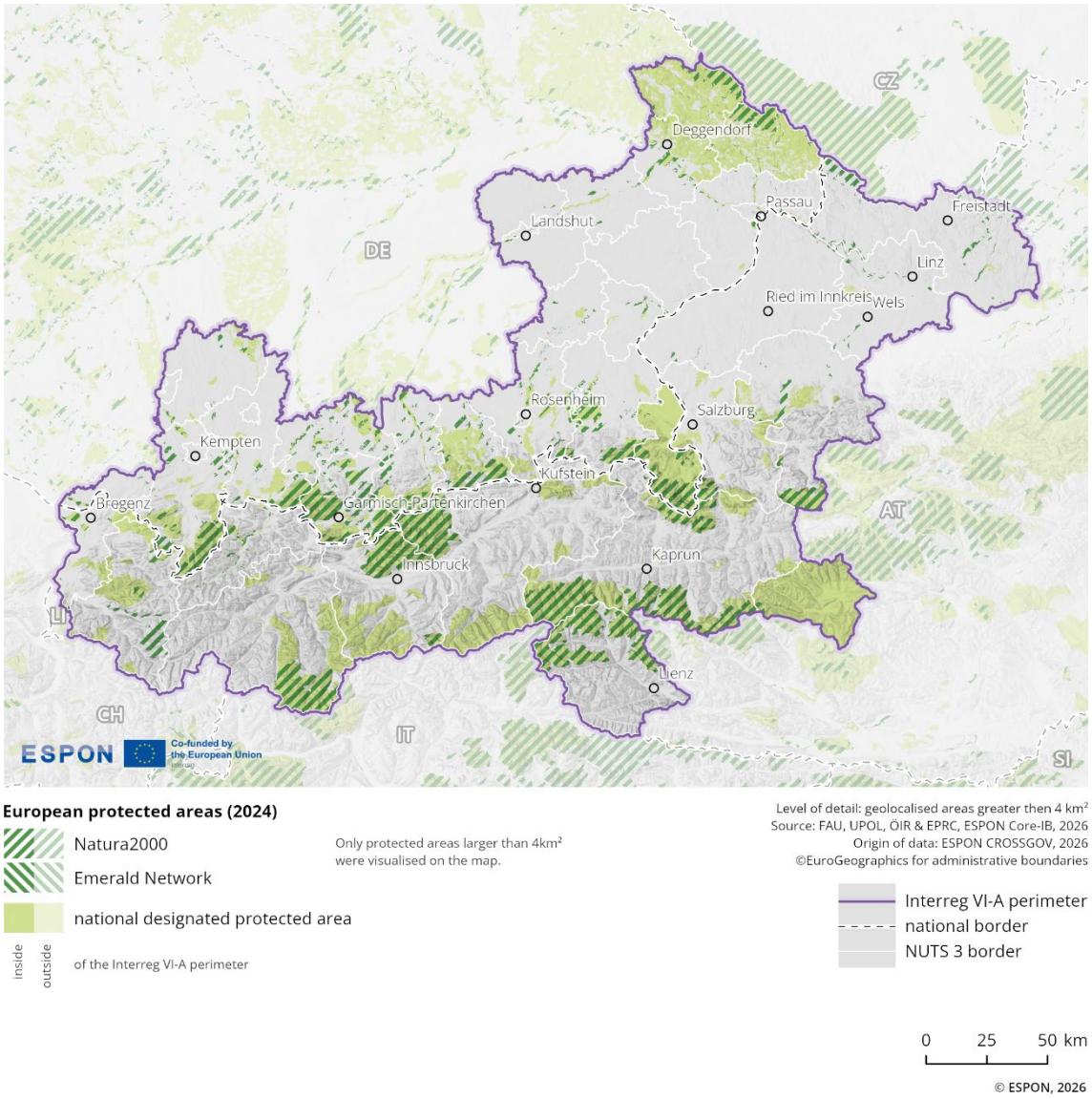
- **Source/method of retrieval**: The indicator represents a combination of nationally designated areas, Natura 2000 and Emerald network provided by EEA (European Environment Agency) Geospatial data catalogue.
- **Temporal coverage**: 2024
- **Unit**: n/a

Please refer to the technical annex for more information.

Figure 2.19 illustrates the distribution of protected areas in 2024 across the border region. The data differentiate between Natura 2000 sites, the Emerald Network, and nationally designated protected areas, with only protected areas larger than 4 km² displayed.

Protected areas in the Germany–Austria border region are densely concentrated along the alpine arc in the southern part of the Interreg region. The largest contiguous areas, overlapping Natura 2000 and nationally designated areas, are located near Innsbruck, south of Salzburg, and Garmisch-Partenkirchen. These areas often have cross-border counterparts and form continuous zones across the Germany–Austria border. Further north, protected areas become more fragmented, with smaller sites near Kempten, Rosenheim and Linz. There is another large protected area stretching across the Alpine region north of Lienz. A further substantial protected area, one of the largest in in the whole region, is located to the north of Passau, mainly nationally designated however forming a cross-border protected area with Czechia. Besides this area, in the central northern part of the region, coverage is sparse. Several large, protected areas extend beyond the Interreg region, especially into Austria, Switzerland, and Italy.

Figure 2.19: Nature protected areas



2.3.1.2 Air pollution

Indicator description

The indicator shows the air pollution from fine particulates (PM2.5) at NUTS3 level. The data shows the population-weighted average air pollution level (µg/m³), providing an indication of the extent to which the regional population is affected by air pollution.

- **Source/method of retrieval**: Processing and analysis of European Environment Agency data
- **Temporal coverage**: 2022
- **Unit**: Population weighted average of µg/m³

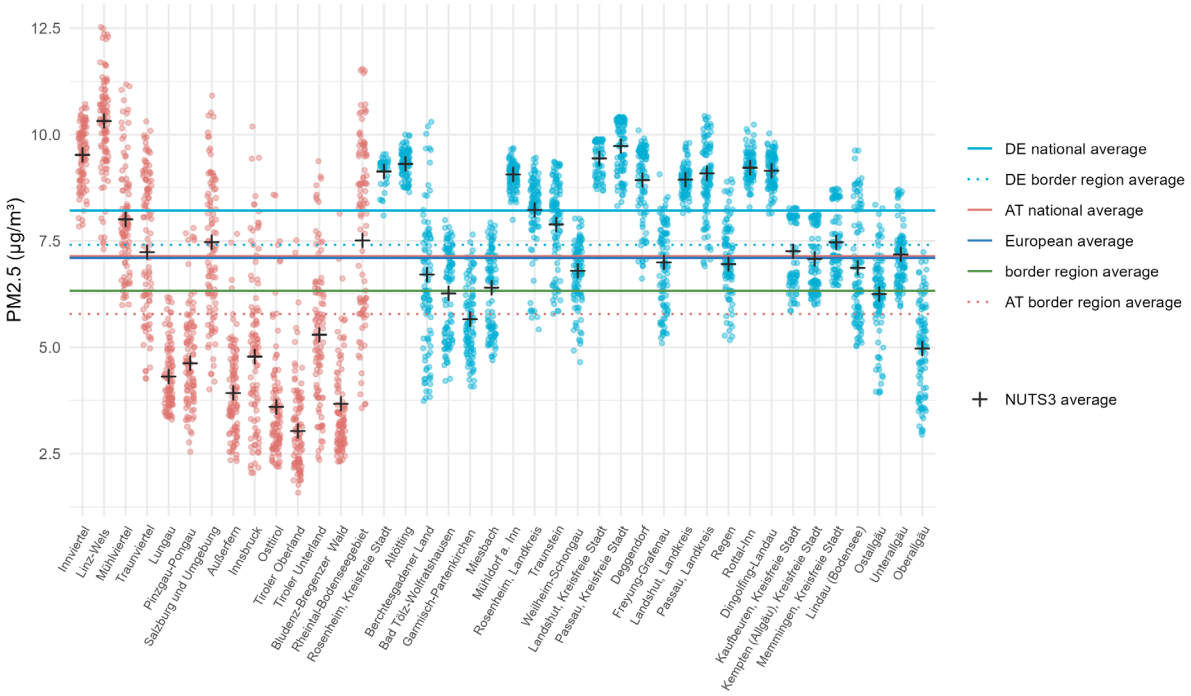
Please refer to the technical annex for more information.

Figure 2.20 illustrates PM2.5 concentrations (in µg/m³) across NUTS3 regions in Austria and Germany (Bavaria). Each small dot represents an individual measurement, while the black crosses indicate the average PM2.5 concentration for each NUTS3 region[11]. The regions are aligned along the x-axis, with Austrian regions on the left (in red) and German/Bavarian regions on the right (in blue).

Austria exhibits greater regional variation in PM2.5 levels than Germany, where values are more consistently clustered. Overall, Austria's national average PM2.5 concentration is lower than that of Germany both at the national and border region levels. The Austrian border region average is notably lower than Austria's national average. The same pattern can be observed for the German national and border region average, although it is less clearly defined.

The European average is slightly lower than both national values but closely aligns with the Austrian national average. The cross-border average falls below the German national and border averages as well as the European average yet remains above the Austrian border region average.

Figure 2.20: Air pollution



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[11] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

2.3.1.3 Water pollution

Indicator description

The indicator shows the ecological status or potential for coastal and river water bodies. It is based on an assessment of biological, hydro-morphological, chemical and physico-chemical quality elements.

- **Source/method of retrieval**: Processing and analysis of European Environment Agency data
- **Temporal coverage**: 2022 (supplemented by 2016 data)
- **Unit**: n/a

Please refer to the technical annex for more information.

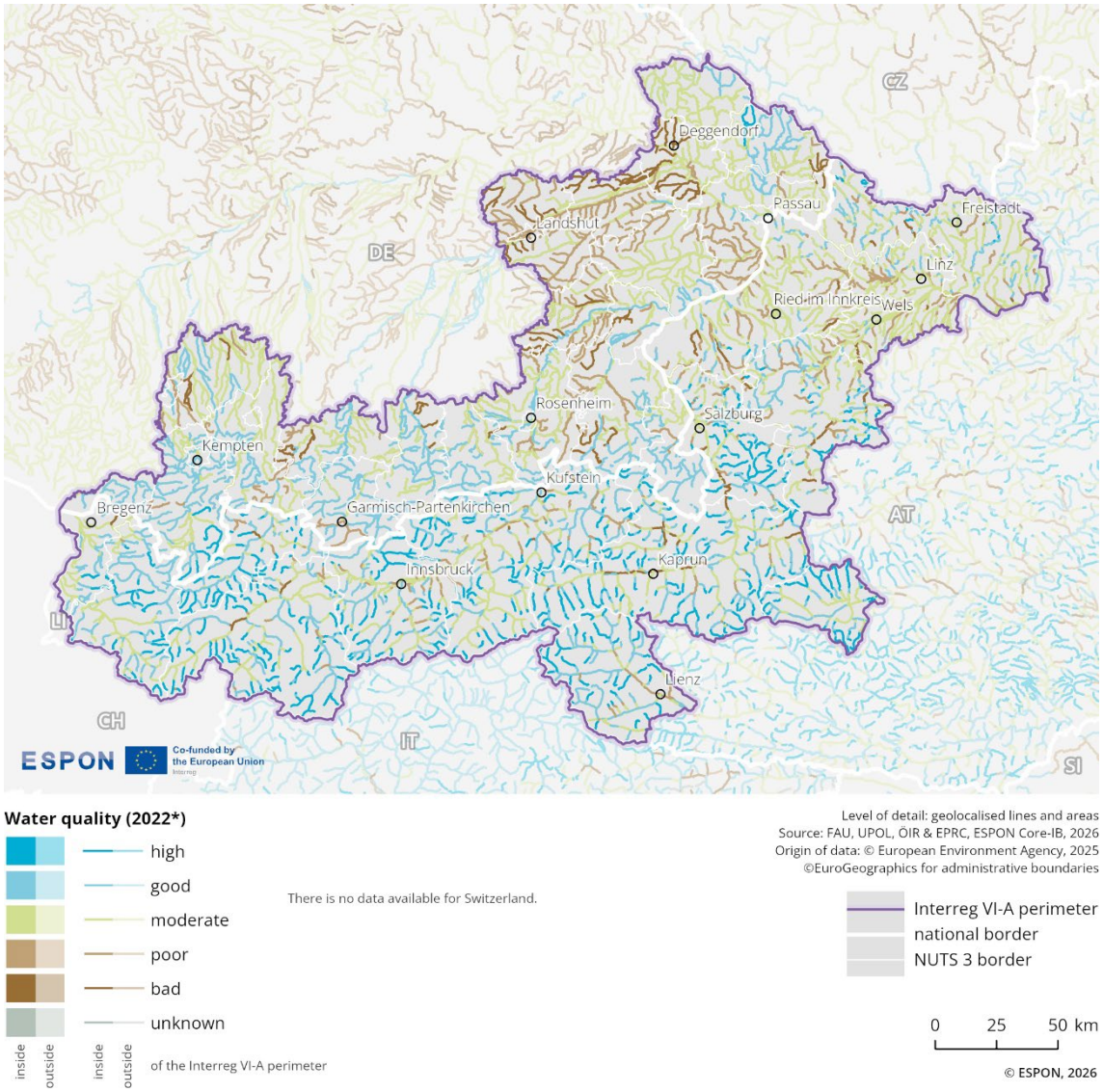
Figure 2.21 illustrates water pollution levels in the Alpine German Austrian Interreg region in 2022. Water quality is represented using 6 colour-coded categories, ranging from "bad" to "high", including an "unknown" category[12].

In the Austrian part of the Interreg region, water quality is generally rated as "high" or "good", particularly in the mountainous areas. However, moving eastwards towards Upper Austria, more rivers are classified as having "moderate" water quality, especially in the vicinity of Linz.

In the German part of the Interreg region, rivers in the alpine areas are largely rated as "high" or "good". Further north, towards Landshut and Passau, more rivers are classified as "moderate" or "poor".

[12] For more information see the Water Framework Directive Reporting Guidance (2022): https://cdr.eionet.europa.eu/help/WFD/WFD_715_2022

Figure 2.21: Water quality patterns



2.3.2 Climate risks and resilience

This sub-dimension examines cross-border functional links relating to climate risks and resilience. It analyses exposure to natural hazards such as landslides, earthquakes, droughts and floods in order to identify vulnerabilities and risks.[13]

2.3.2.1 Natural hazard risks

Indicator description

The indicator shows the risk the border region is facing in relation to natural hazards (floods, droughts, landslides and earthquakes). The map highlights potential cross-border affectedness and allows to judge the relative relevance of each risk for the cross-border region.

- **Source/method of retrieval**: The indicator is based on geodata from the Disaster Management Risk Knowledge Centre/JRC. It provides the likelihood of specific natural hazard events at grid level.
- **Temporal coverage**: 2024
- **Unit**: n/a

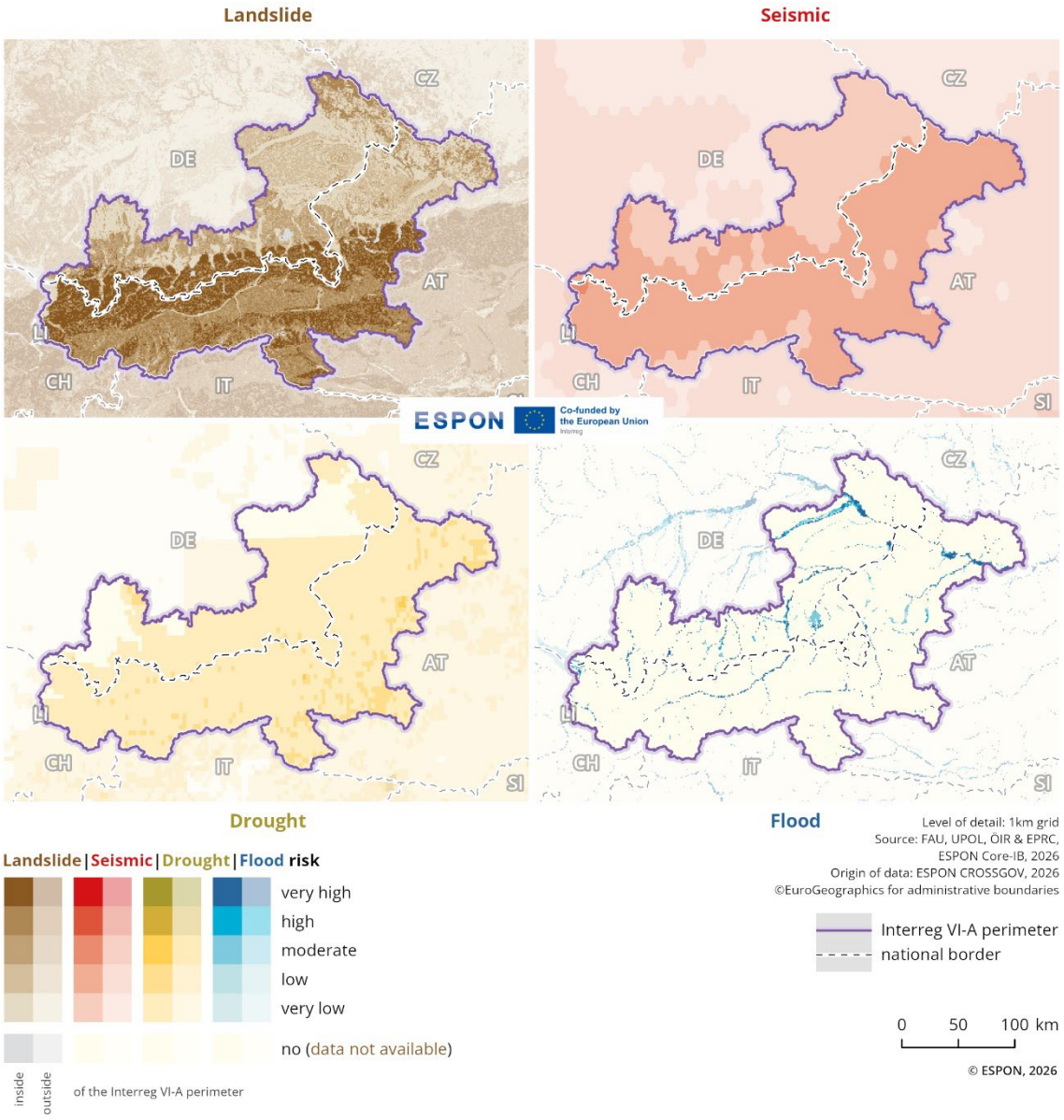
Please refer to the technical annex for more information.

Figure 2.22 illustrates the spatial distribution of natural hazards in the Austria-Germany/Bavaria region, highlighting areas where risks are shared across national boundaries and where risks are not necessarily cross-border relevant.

Landslides are a major concern for the region, as large parts are located within the Alps. In general, the Austrian side is affected more by the issue of landslides. However, some of the areas with the highest risk of landslides are exactly located alongside the border. The biggest risk of flooding can be observed in the area where the Isar flows into the Danube, which is located on the German side. Another flood risk stems from the Inn, which runs through both Austria and Germany, centrally within the region. The drought risk can be described as low and equally distributed across the region. Risk of seismic activities are also low, but on average higher on the Austrian side.

[13] See also: European Commission 2024: Strengthening the Resilience of EU Border Regions, https://ec.europa.eu/regional_policy/sources/studies/KN-02-24-586-2A-N.pdf

Figure 2.22: Natural hazard risks



2.3.3 (Renewable) Energy and energy infrastructure

This sub-dimension assesses cross-border functional links in energy supply and infrastructure, focusing on existing connections and missing links. The distribution of power lines, energy infrastructure and power stations is analysed to identify supply patterns and potential integration gaps. The analysis reveals whether the border facilitates energy cooperation and connectivity, or if infrastructural differences create barriers.[14]

[14] See also: European Commission 2025: Handbook on Cross-border Energy Communities, https://ec.europa.eu/regional_policy/sources/studies/2025/Handbook_on_Cross-border_Energy_Communities.pdf

2.3.3.1 Power lines and energy infrastructure

Indicator description

The indicator shows the distribution of power lines and energy infrastructures in the cross-border region. The geodata highlights the existing links and gaps in the cross-border interconnections of the energy transmission network.

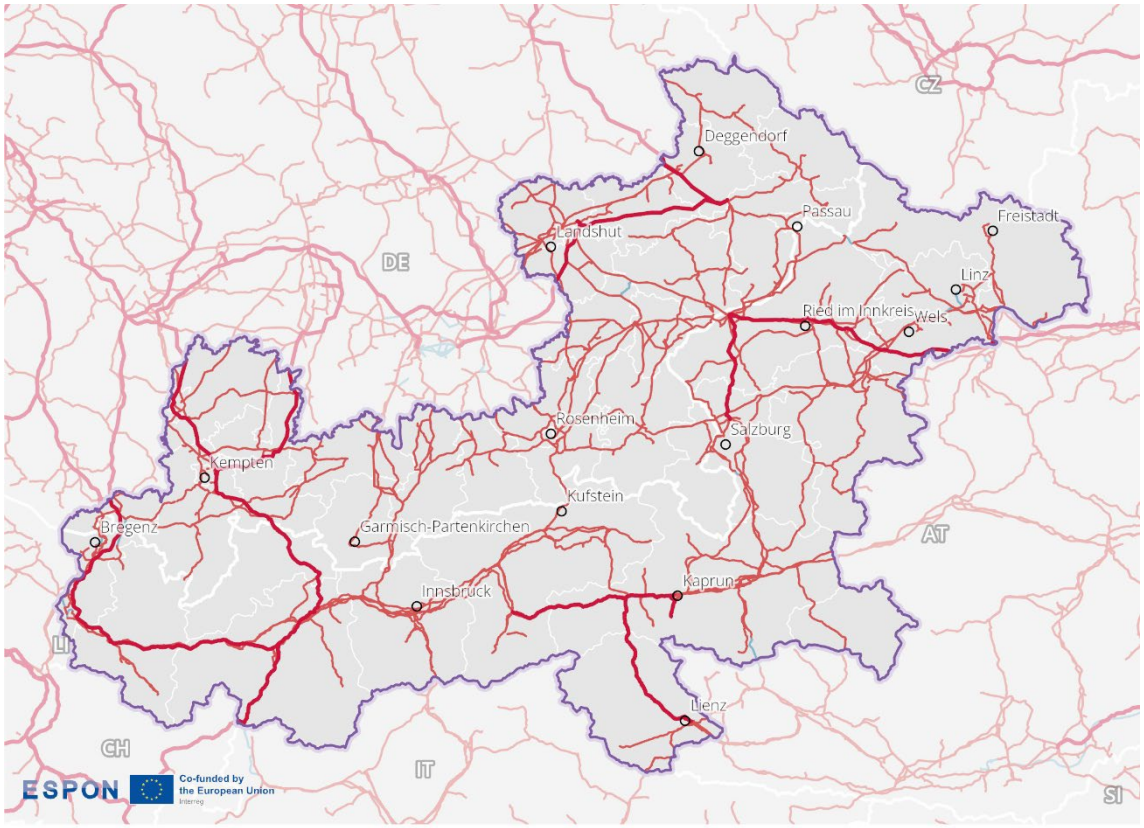
- **Source/method of retrieval**: Geodata on high-voltage energy infrastructure (100 kV and above) has been collected and processed from OpenStreetMap.
- **Temporal coverage**: 2025
- **Unit**: kV

Please refer to the technical annex for more information.

Figure 2.23 illustrates the distribution of power lines and cables in 2025 across the border region. The data distinguish between overhead and underground power lies, further classified into high-voltage (100-230 kV), extra high-voltage (230-1,000 kV), and ultra-high voltage (above 1,000 kV).

The Austrian-German cross-border region features dense high- and extra high-voltage energy infrastructure, especially on the German side. On the Austrian side of the border, the course of the energy infrastructure is more shaped by the geomorphology of the terrain, and so the network is not branched out in multiple directions, but rather follows a west-east direction. Extra high-voltage lines directly connect Germany and Austria on the west, while north of Salzburg, the Austrian section of the extra high-voltage line transitions into a high-voltage lines in Germany, which then branches off in a northwesterly direction into the mainland. In addition, high-voltage lines cross coutries' border at several points more or less evenly distributed along the entire length of the border.

Figure 2.23: High-voltage transmission infrastructure



Overhead power lines (2025)

- High Voltage (100–230 kV)
- Extra High Voltage (230–1.000 kV)
- Ultra High Voltage (1.000 kV+)

Underground power cables (2025)

- High Voltage (100–230 kV)
- Extra High Voltage (230–1.000 kV)
- Ultra High Voltage (1.000 kV+)

inside / outside of the Interreg VI-A perimeter

ANSI Standard C84.1 was used for classification of power lines.

Level of detail: geolocated lines
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON CROSSGOV, 2026
©EuroGeographics for administrative boundaries

- Interreg VI-A perimeter
- national border
- NUTS 3 border

0 25 50 km

2.3.3.2 Power stations

Indicator description

The indicator shows the location of power stations by type and energy production levels (coal, gas and oil, nuclear, hydro). It can indicate differences and complementarities in the national energy supply systems as well as highlight potential supply-demand links when viewed in conjunction with power lines infrastructure.

- **Source**: OpenStreetMap, Global Energy Monitor, JRC Hydro-power plants database
- **Temporal coverage**: 2025
- **Unit**: MW

Please refer to the technical annex for more information.

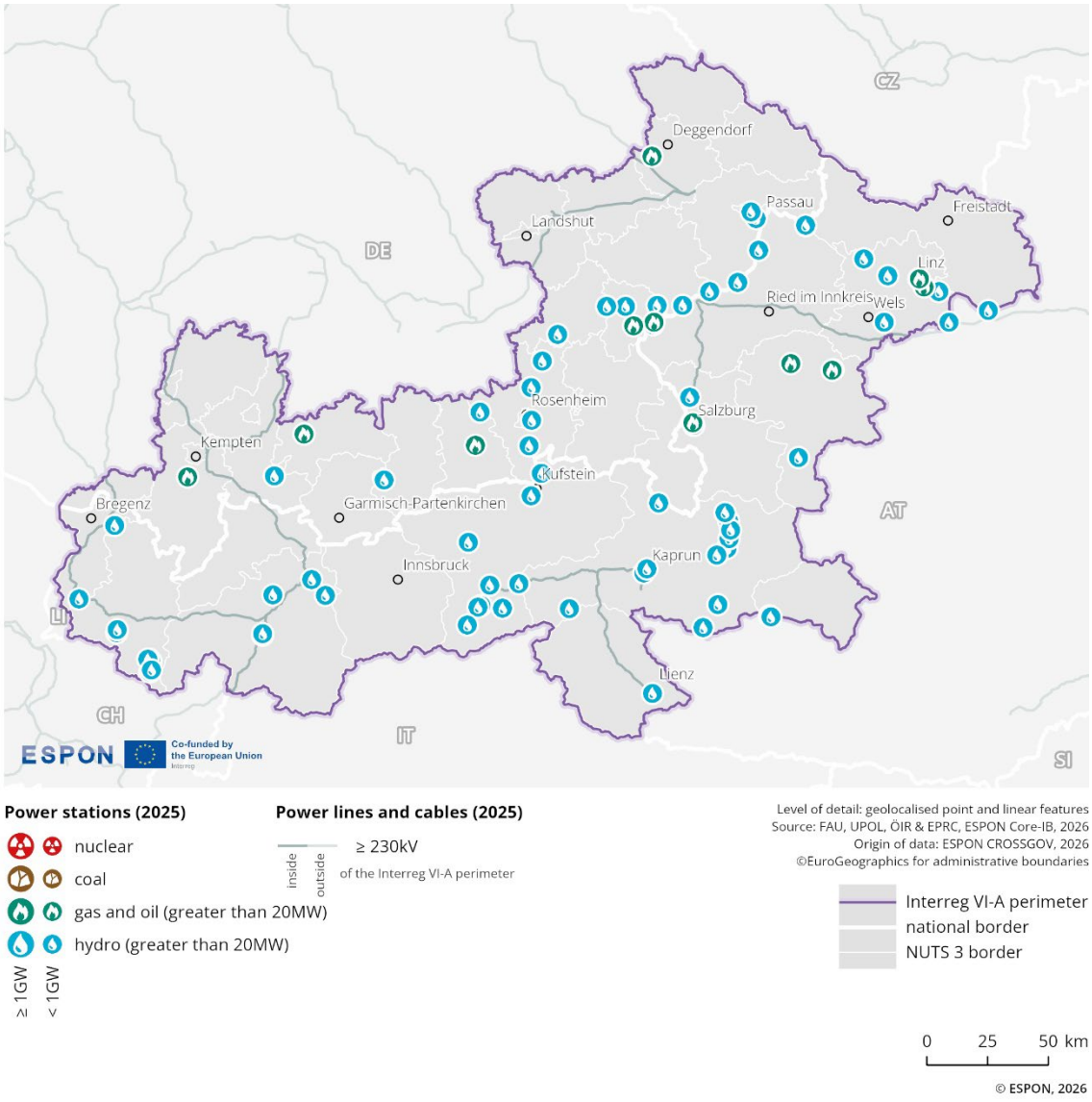
In the Austria-Germany cross-border region, in total, there are 84 locations with power stations and the majority is represented by hydroelectric ones (see Table 1).

Table 1: Number and type of power stations

Power stations/plants	Less than 1GW	1GW and up
Nuclear	/	/
Coal	/	/
Gas and oil	13	/
Hydro	71	/

17 out of 71 hydroelectric stations are located in Germany (mostly on the river Inn), the rest in Austria and spread throughout the area (see Figure 2.24). Based on their number and geographical distribution, it is clear that this energy source is a vital source of electricity in the region. On the other hand, this cross-border region is absent of any nuclear power plants or coal power stations. Lastly, there are a total of 13 oil and gas power stations in the region, 6 on the German side and 7 on the Austrian side, with 2 each near Salzburg, Linz, and Laakirchen.

Figure 2.24: Power stations infrastructure



2.3.4 Resources and circular economy

This sub-dimension focuses on resource use patterns in the border region and their implications for circular economy practices. It analyses resource productivity and waste generation in order to evaluate the efficiency and sustainability of resource utilisation across the border.

2.3.4.1 Resource productivity

Indicator description

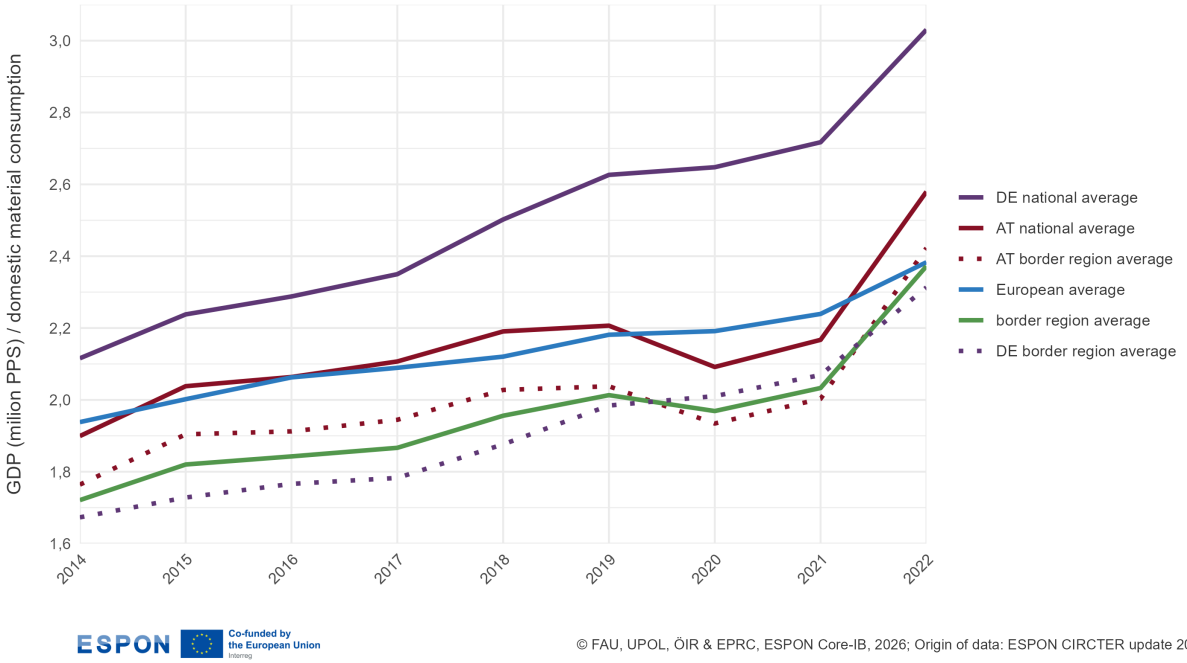
The indicator shows the economic value generated per unit of material consumed for each region within the cross-border area. Developments over time provide insights if the decoupling of productivity from resource use is progressing on regional level.

- **Source/method of retrieval**: Processing of Eurostat and ESPON CIRCTER (Circular Economy and Territorial Consequences) Update data
- **Temporal coverage**: 2014-2022
- **Unit**: PPS/tons

Please refer to the technical annex for more information.

Figure 2.25 illustrates the development of GDP per unit of domestic material consumption in million PPS/DMC (purchasing power standards per domestic material consumption) between 2014 and 2022. The data compare the national averages, the averages of their respective border regions, and the overall border regional average with the European average.

Figure 2.25: Resource productivity



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The German national average of resource productivity is represented by the highest line in the graph, showing a steady increase over the period from approximately 2.1 in 2014 to over 3.0 million PPS/DMC in 2022. The German border region average follows a similar trend but remains significantly lower,

reaching around 2.3 million PPS/DMC in 2022. The Austrian national average also shows an upward trend during the observed period, with a slight decline in 2020. After that, it increases sharply again, though it remains significantly below the German national average. The Austrian border region average follows a similar pattern, but at lower levels than the Austrian national average.

The European average lies significantly below the German national average, but is closely aligned with the Austrian border region average and notably higher than the overall border region average. The overall border region average rises noticeably more steeply from 2021 onwards and reaches the same level as the European average in 2022, at approximately 2.4 million PPS/DMC. The border region average represents the combined average of the Austrian and German border regions, which have followed a relatively aligned trend since 2019.

2.3.4.2 Generation of waste per GDP

Indicator description

The indicator shows the regional distribution of waste creation in relation to the GDP development. Comparing waste generated to GDP reflects the waste intensity of the economy and provides a measure of "eco-efficiency". Observation of its change from year to year permits to assess whether the economy is able to produce more wealth while at same time generating less waste.

- **Source/method of retrieval**: Processing of Eurostat and ESPON CIRCTER Update data
- **Temporal coverage**: 2014-2022
- **Unit**: Tons/PPS

Please refer to the technical annex for more information.

Figure 2.26 illustrates the trend in waste generation relative to economic output, measured in tonnes of waste per million PPS (Purchasing Power Standard) of GDP from 2014 to 2022 in Austria, Germany (Bavaria) and their Interreg border region.

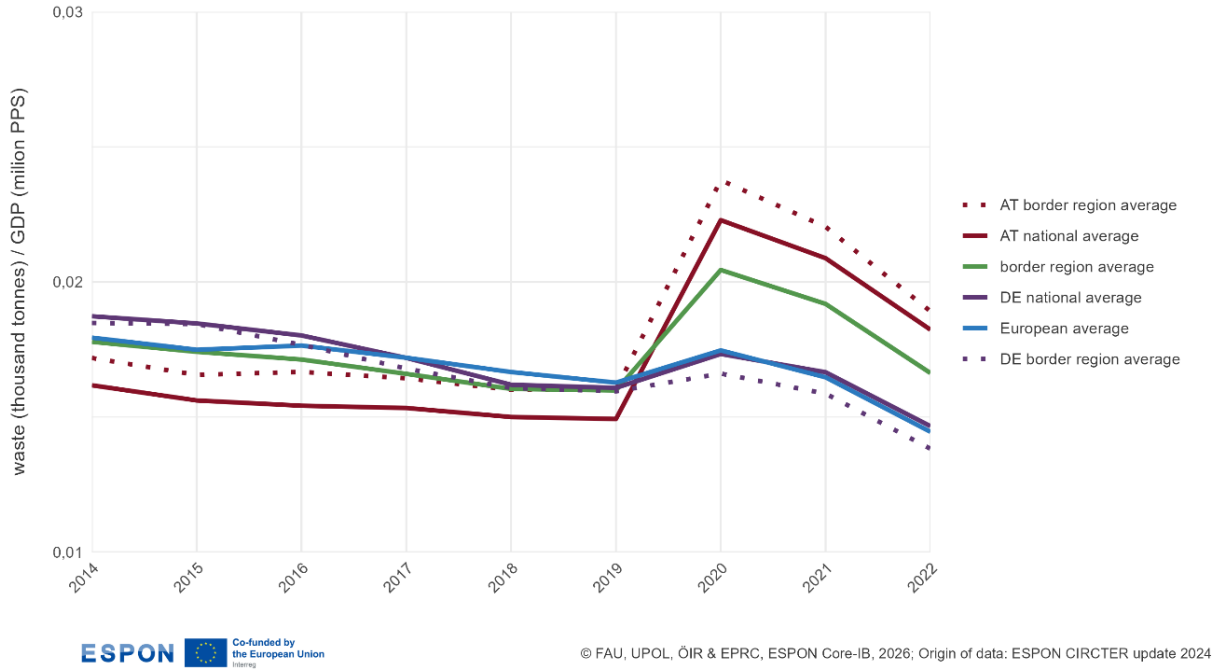
The German national average of waste per GDP steadily decreases over time, reaching a value of approximately 0.015 tonnes of waste per GDP in 2022. The German border region average follows a nearly identical trend, remaining very close to the national average. For the period 2014-2019, the Austrian national and border region averages are at a lower level than the German values until 2019, when both experience a sharp increase to over 0.025 tonnes of waste per GDP. Afterwards, both Austrian values decline again but remain above the German values.

The European average decreases gradually from around 0.018 in 2014 to about 0.015 in 2022. Germany's national and border values remain close to the European average throughout. Austria's national and border values are below the EU average until 2019, but then rise above it significantly from 2020 onwards.

The combined border regional average steadily decreases until 2019, then rise sharply in 2020, followed by a slight decline to a value of approximately 0.017 tonnes of waste per million PPS in 2022. Until 2019, it remains between the German and Austrian border averages and is either below or aligned with the European average.

After 2019, due to the sharp increase in the Austrian border region average, it rise above the European average.

Figure 2.26: Waste generation per GDP



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2.3.5 Key messages on the green dimension

The border region exhibits a high degree of environmental interconnectedness, characterised by common natural resources, risks and infrastructure, which present both opportunities and challenges for cross-border sustainability.

One of the most visible signs of this are the protected areas, where contiguous Natura 2000 and national sites span the border. These contiguous areas offer significant opportunities for cross-border management and nature conservation.

Environmental quality indicators such as air pollution reveal further contrasts: while Austria has lower average PM2.5 concentrations (in µg/m³) than Germany, there is higher regional variation. This implies that, although Austria performs better overall, it may face more localised challenges requiring targeted responses. Conversely, Germany's more consistent values may indicate a different governance or monitoring structure, despite slightly higher pollution levels.

Natural risks, such as landslides and flooding, further highlight common vulnerabilities. While landslides affect the Austrian side more, several high-risk zones align directly with the border. Similarly, flood risk is concentrated along rivers such as the Inn and the Danube, highlighting the need for integrated risk management.

Energy infrastructure is dense and interconnected, particularly in the form of high-voltage grids and hydroelectric stations, which are well distributed on both sides. However, Austria's grid is shaped differently to Germany's due to geomorphological constraints, affecting network resilience and distribution efficiency. While the common reliance on hydropower is a strength, it also requires careful coordination due to climate-related variability in water availability.

Indicators of resource productivity and waste per GDP show diverging performance. Germany shows strong performance in both areas, while Austria's figures tend to fluctuate. These differences suggest scope for cross-border knowledge sharing, but also highlight the uneven pace of the transition towards circular economy goals. Germany's expertise in the field of circular economy could be transferred with Austria. This could highlight the potential for cross-border knowledge transfer and the strengthening of the border region.

2.4 Socio-economic dimension

The socio-economic dimension examines patterns of social integration, tourism, and access to public services in the border region. It identifies how socio-cultural links, visitor flows and essential services influence development in the cross-border area. By examining interpersonal interactions via social media, language similarities, tourism intensity, and the accessibility of facilities such as secondary schools, grocery shops, hospitals, doctors, pharmacies and cinemas this dimension highlights both functional integration and potential socio-spatial differences.

2.4.1 Social integration

This sub-dimension evaluates the level of social integration in the border region by identifying areas with low or high cross-border interactions. It analyses social interactions and language similarities across and along national borders to evaluate the potential for cultural and social integration.

2.4.1.1 Cross-border connectivity in social media

Indicator description

The indicator refers to the existing connections between users of META social media (in particular Facebook) across the border. It aims at giving an overview of the degree of personal connectivity between inhabitants of the border area. Even though not all these internet connections will relate to real communication exchanges but sometimes just "following" content from other users, they give an overview of interpersonal and cultural knowledge of the social media landscape from across the border.

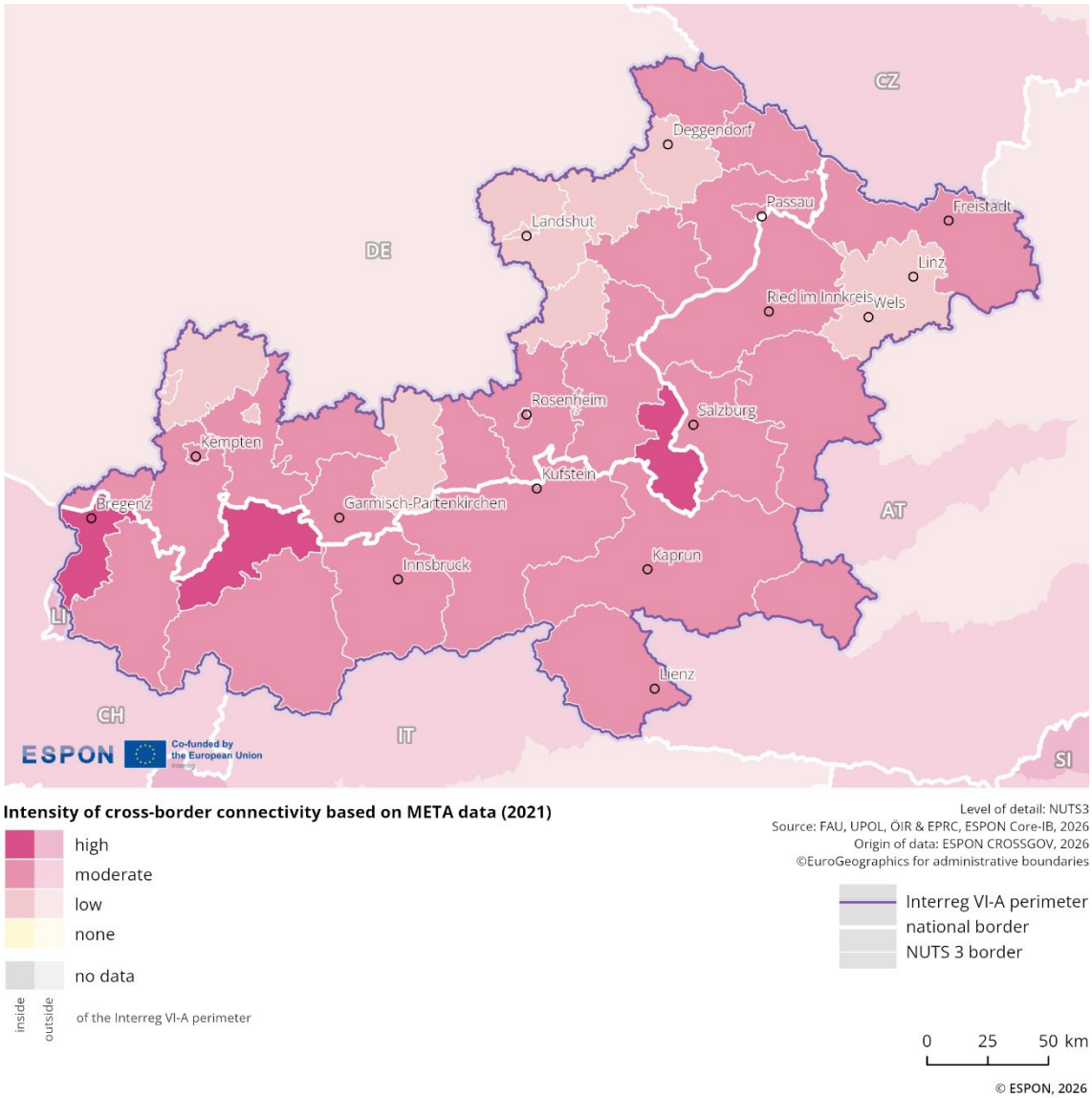
- **Source/method of retrieval**: Processing Facebook data on existing connections across the border (data for Good Meta)
- **Temporal coverage**: 2021
- **Unit**: n/a

Please refer to the technical annex for more information.

Figure 2.27 illustrates the spatial distribution of cross-border connectivity based on Facebook information in the border area. The different shades of pink indicate varying intensities of connectivity, ranging form low to high, with darker tones representing stronger intensity of cross-border connectivity in social media.

Therefore, due to similar levels of cross-border connectivity on both sides of the border, no significant differences between the countries are apparent. On the Austrian side of the region, high values are recorded in 2 areas in the west directly along the state border (south of the German city of Kempten), while in other parts the cross-border connectivity in social media is moderate, except for the NUTS3 unit around Linz, where it is low. In the German part of the region, most areas display moderate cross-border connectivityy (including cities such as Kempten, Garmisch-Partenkirchen, Rosenheim, and Passau), with high values found in the territorial unit west of Salzburg. Low values are observed in areas north of Kempten, east of Garmisch-Partenkirchen, and in the wider surroundings of Landshut.

Figure 2.27: Cross-border connectivity in social media



2.4.1.2 Language similarities along national borders

Indicator description

The indicator specifies whether the language is the same across the border, whether the respective national languages have commonalities, whether while different, there are local linguistic commonalities, and whether the language is different.

- **Source/method of retrieval**: ESPON cross-border public services (CPS) 2.0 database along border segments
- **Temporal coverage**: 2022
- **Unit**: n/a

Please refer to the technical annex for more information.

The entire programme area shares one common language, thus no language barriers are relevant in any parts of the region. The absence of linguistic barriers between Germany and Austria facilitates cross-border interactions, as both countries share German as an official language. This enables people to commute, find employment and cooperate without any language-related difficulties.

2.4.2 Tourism

This sub-dimension identifies key tourism hotspots in the border region to highlight tourism dynamics. It analyses the number of nights spent in tourist accommodation establishments in order to evaluate the attractiveness of, and developments in, the tourism sector. Comparisons with the respective countries and the EU average provide context for understanding the region's dynamics.

2.4.2.1 Nights spent at tourist accommodation establishments

Indicator description

The indicator shows the number of nights a guest or tourist actually spends in a tourist accommodation establishment or non-rented accommodation (overnight stays). This may reveal the tourism attractiveness of a region and shed light on the role of tourism in the local economy, i.e., tourists/guests staying overnight may spend more in the region than one-day visitors.

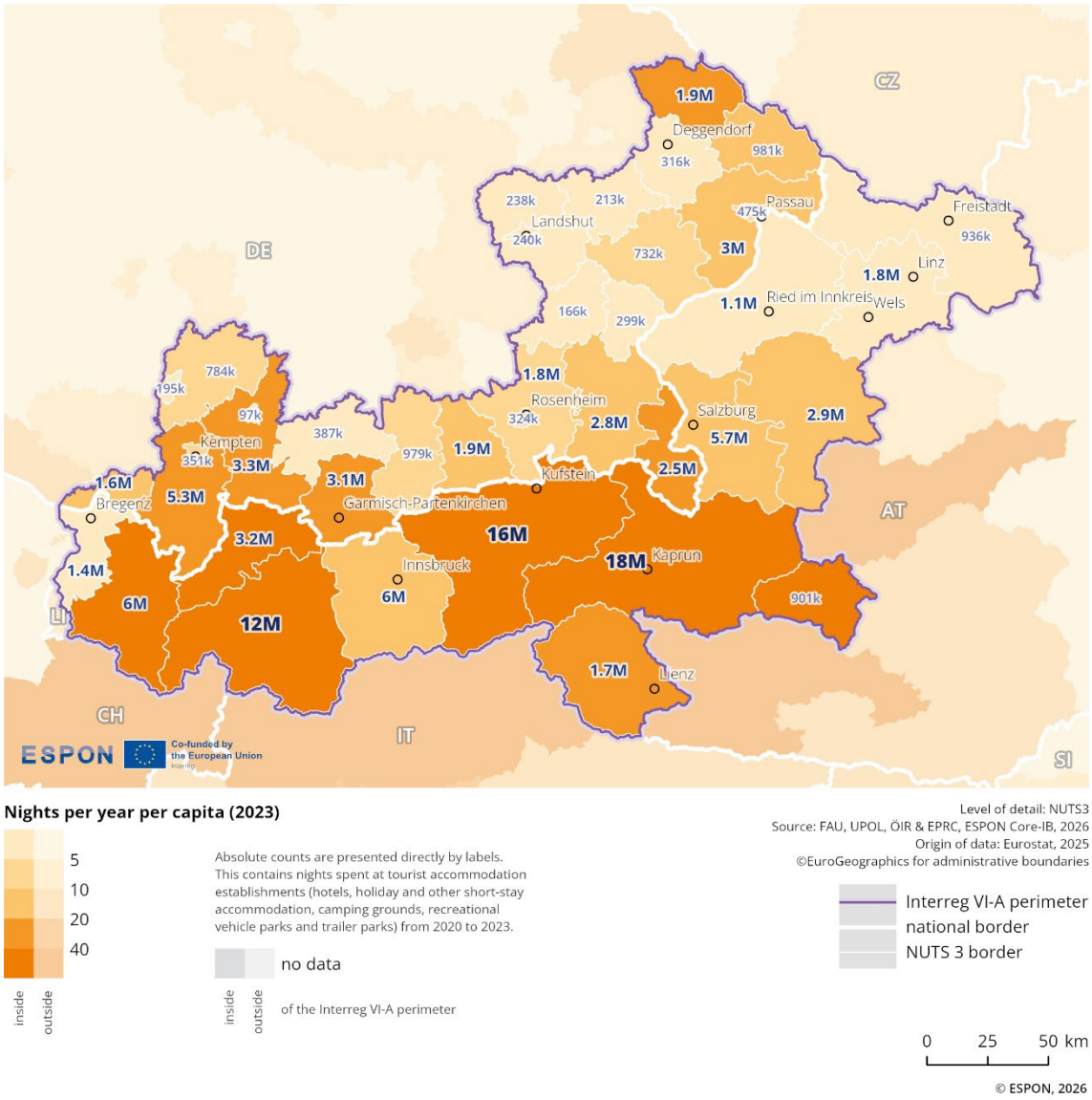
- **Source**: Eurostat
- **Temporal coverage**: 2020-2023
- **Unit**: Nights per capita

Please refer to the technical annex for more information.

The spatial distribution of overnight stays highlights the importance of key tourist destinations in border areas. Tourism contributes significantly to regional income, infrastructure development and employment, and thereby supports regional prosperity. At the same time, it affects environmental and living conditions, which may reduce local acceptance despite its economic benefits. This is in particular the case in places of overtourism, seasonal pressures, and increasing land-use conflicts.

Figure 2.28 shows the number of overnight stays per capita at tourist accommodation establishments in 2023. It includes hotels, holiday and other short-stay accommodation, as well as campsites, caravan and trailer parks. The map uses a colour gradient, with darker shades indicating a higher number of nights spent per capita in 2023. It also shows the cumulative number of overnight stays from 2020 to 2023.

Figure 2.28: Overnight stays in tourism



A particularly high intensity of overnight stays is obvious on the Austrian side of the border. Several NUTS3 regions exceed 40 nights per capita in 2023, including Bludenz-Bregenzer Wald, Außerfern, Tiroler Oberland, Tiroler Unterland, Pinzgau-Pongau and Lungau[15]. On the German side, the per capita figures are somewhat lower, though still relatively high in regions directly adjacent to the national border (e.g., Oberallgäu, Ostallgäu, Garmisch-Partenkirchen, Berchtesgadener Land).

In terms of total overnight stays over the 3-year period, the leading tourism regions are located in Austria: Pinzgau-Pongau (approx. 18 million), Tiroler Unterland (approx. 16 million), Tiroler Oberland (approx. 12 million), Innsbruck (approx. 6 million) and Bludenz-Bregenzer Wald (approx. 6 million). By contrast, the neighbouring German regions have lower absolute and per capita figures, highlighting a certain cross-border asymmetry.

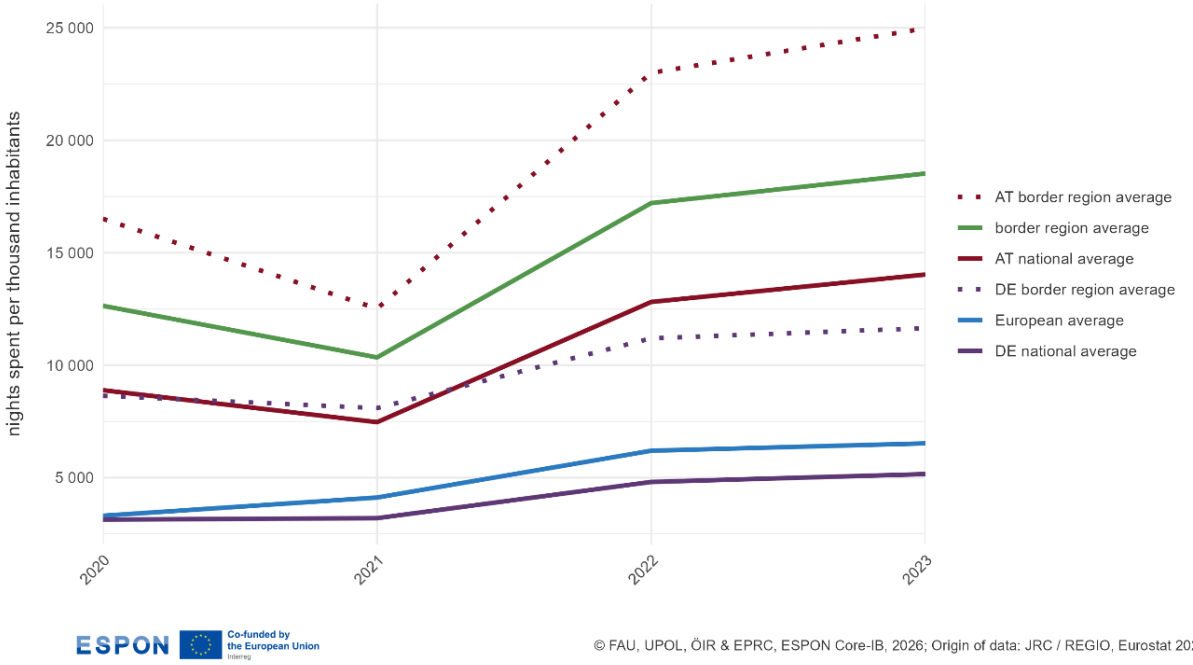
Figure 2.29 illustrates the development of nights spent at tourist establishments per thousand inhabitants from 2020 to 2023. Over the entire period, the average for the Austria-Germany/Bavaria programme area is higher than the overall European average, which includes EU member states and

[15] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

the EFTA countries Iceland, Liechtenstein, Switzerland and Norway. In all 4 years, the border regional averages of both countries are higher than their respective national averages. Additionally, the regional average for the Austrian border area is significantly higher than that for the German throughout the given period.

Touristic patterns have a series of implications for spatial development on either side of the border. Transport infrastructure has to consider peak volumes and balancing recreating activities with socio-cultural as well as environmental heritage can be a challenge.

Figure 2.29: Overnight stays in tourism (comparison)



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2.4.3 Services of general interest

This sub-dimension looks at how accessible services of general interest (SGIs) are in the border region, identifying areas that are well-served and those that are more difficult to access. It analyses access to essential services such as secondary schools, grocery shops, hospitals, doctors, pharmacies and cinemas.

2.4.3.1 Accessibility to services of general interest

Indicator description

The indicator shows, for the below listed facilities and services, the average driving time to the nearest facility of a series of services of general interest.

- **Source/method of retrieval**: Processing and analysis of standardised travel-time accessibility to secondary schools, grocery shops, hospitals, doctors, pharmacies and cinemas available in the ESPON PROFECY Update (2022)
- **Temporal coverage**: 2021
- **Unit**: Minutes (in 2.5 x 2.5 km grid)

Please refer to the technical annex for more information.

Figures 2.30 to 2.35 visualise average car travel times to services of general interest within the programme area. The maps display accessibility to:

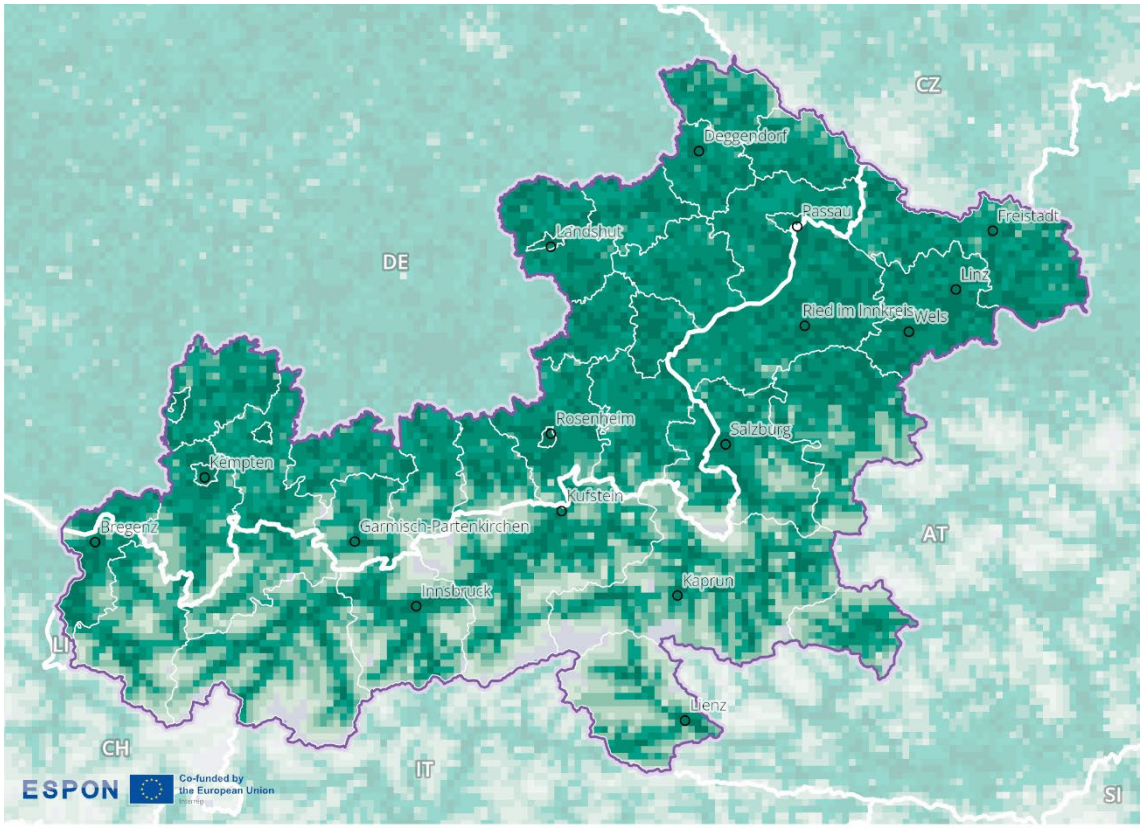
- Secondary schools (Figure 2.30)
- Grocery shops (Figure 2.31)
- Hospitals (Figure 2.32)
- Doctors (Figure 2.33)
- Pharmacies (Figure 2.34)
- Cinemas (Figure 2.35)

These indicators show how long, on average, it takes to reach the nearest facility by car. The data comes from the ESPON PROFECY Update project (2022) and is visualised based on a 2.5-kilometer grid.

In the Austria–Germany/Bavaria border area, essential services such as hospitals, doctors, pharmacies, schools, and grocery shops are evenly distributed across most German areas, resulting in generally good accessibility. In Austrian regions, these services are mostly concentrated in the main valleys, which are also relatively well accessible.

However, the mountainous terrain along the border poses accessibility challenges. Some areas located directly along the border, such as between Garmisch-Partenkirchen and Innsbruck, or south of Berchtesgaden near Salzburg, are harder to reach. The same applies to the southern, inner-Alpine parts of the programme area. Steep mountains make it difficult to build and maintain transport infrastructure, resulting in longer travel times to essential services in these regions.

Figure 2.30: Travel time to secondary schools



Car travel time to the nearest secondary school (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

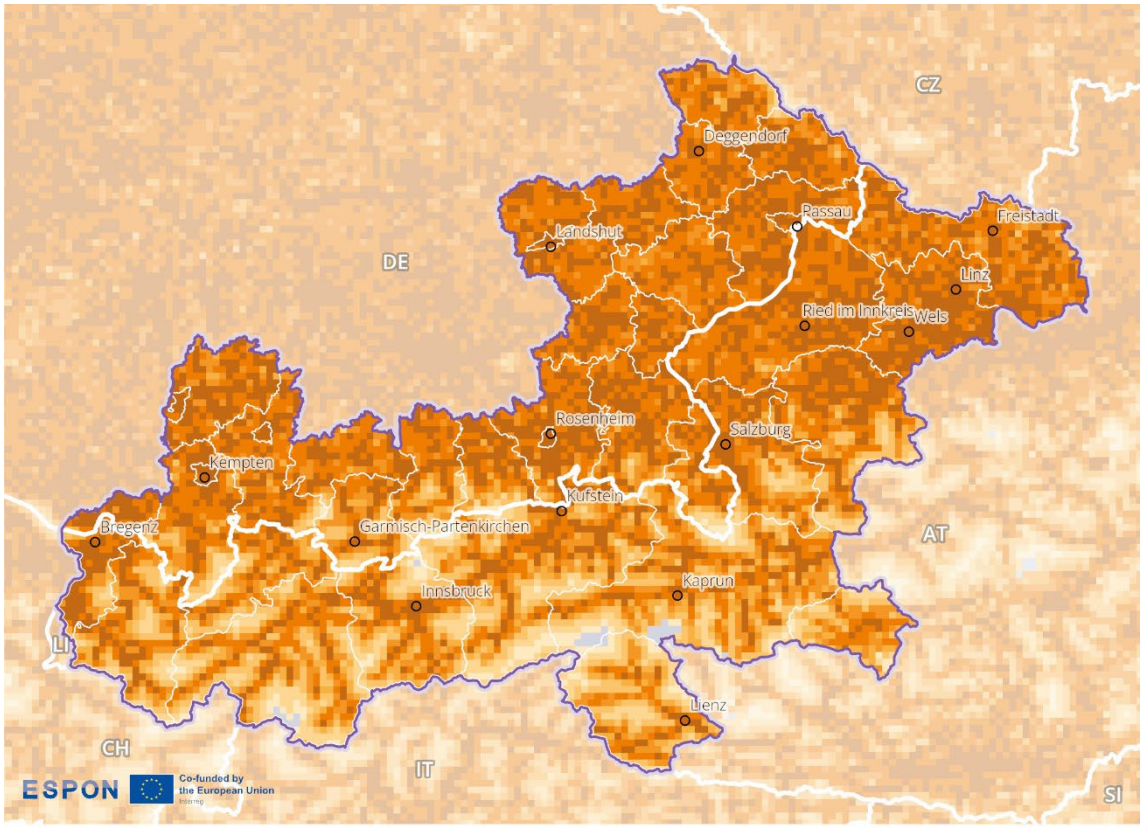
inside outside of the Interreg VI-A perimeter

Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
national border
NUTS 3 border

0 25 50 km

Figure 2.31: Travel time to grocery shops



Car travel time to the nearest shop (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside outside of the Interreg VI-A perimeter

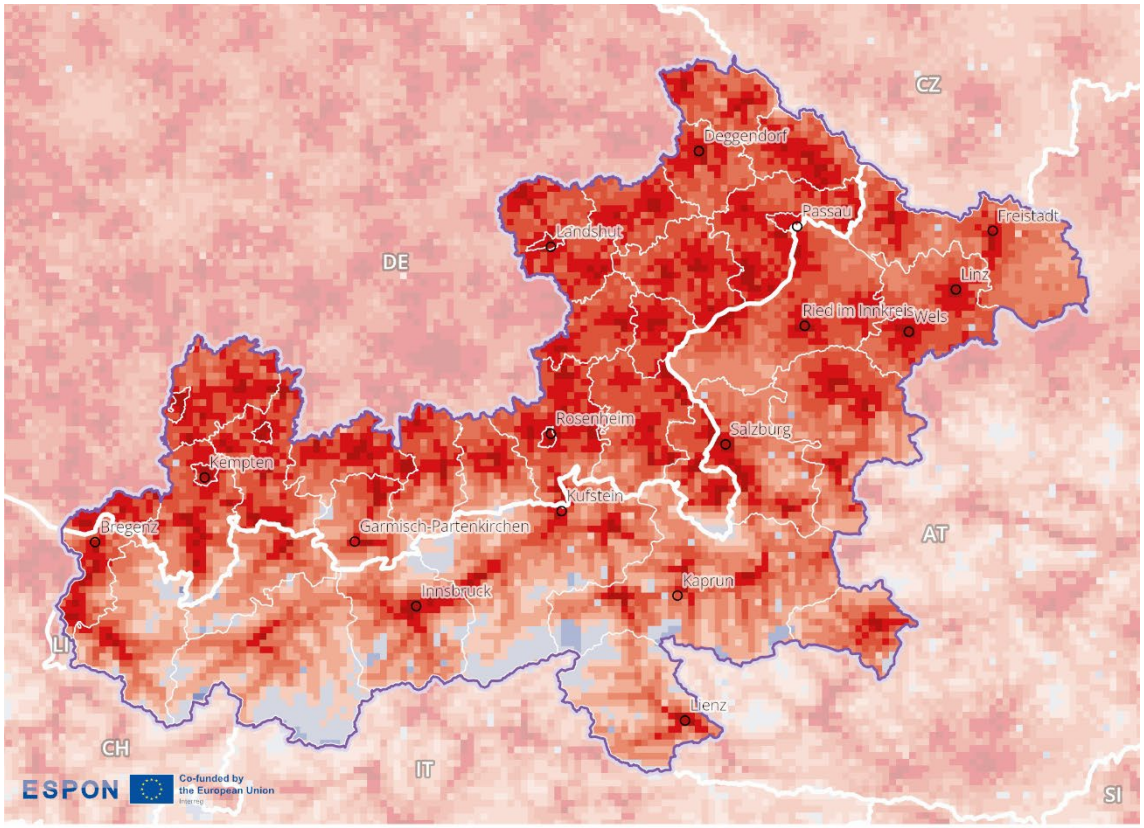
Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
national border
NUTS 3 border

0 25 50 km

© ESPON, 2026

Figure 2.32: Travel time to hospitals



Car travel time to the nearest hospital (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

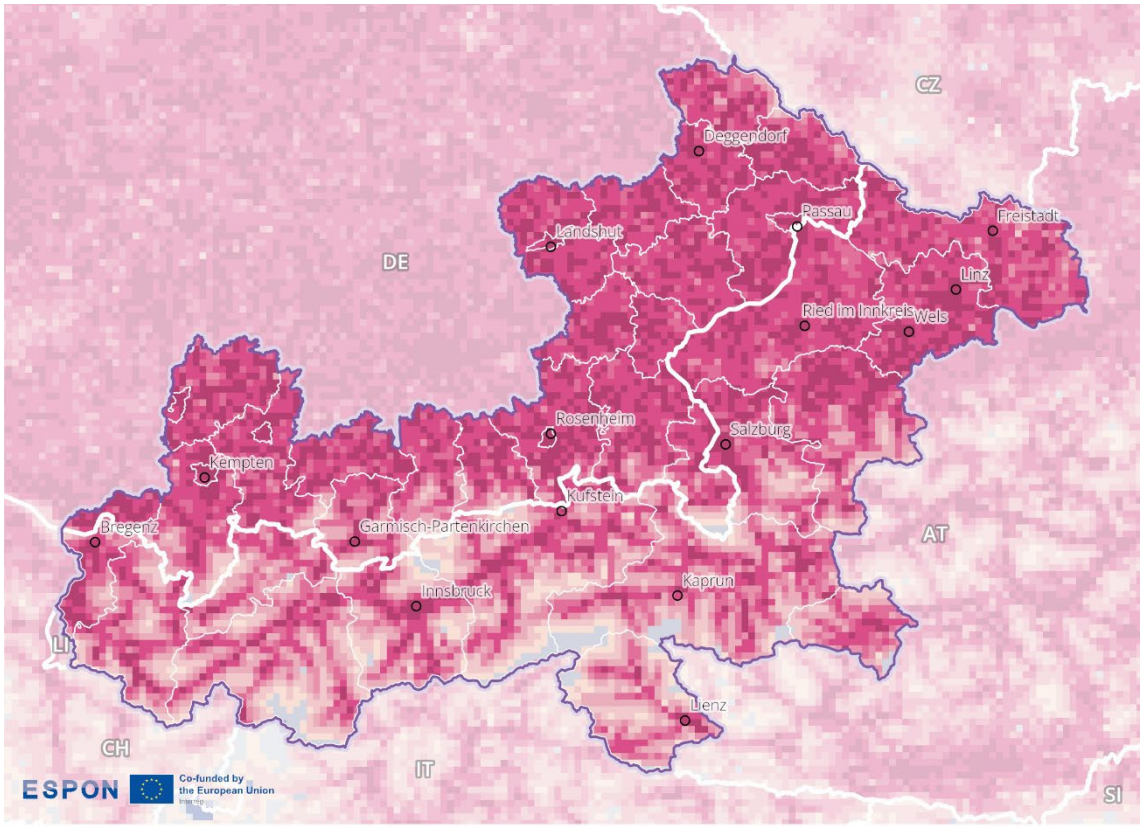
inside outside of the Interreg VI-A perimeter

Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
national border
NUTS 3 border

0 25 50 km

Figure 2.33: Travel time to doctors



Car travel time to the nearest doctor (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

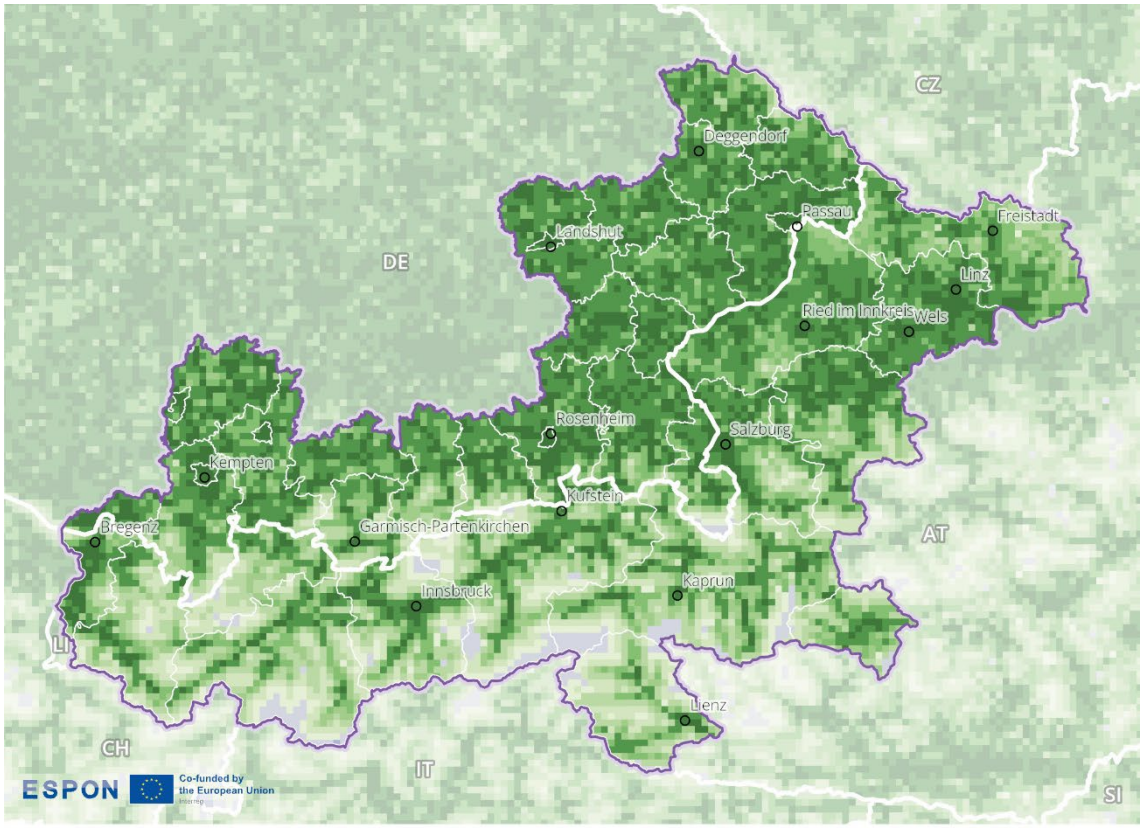
inside outside of the Interreg VI-A perimeter

Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
national border
NUTS 3 border

0 25 50 km

Figure 2.34: Travel time to pharmacies



Car travel time to the nearest pharmacy (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside
outside
of the Interreg VI-A perimeter

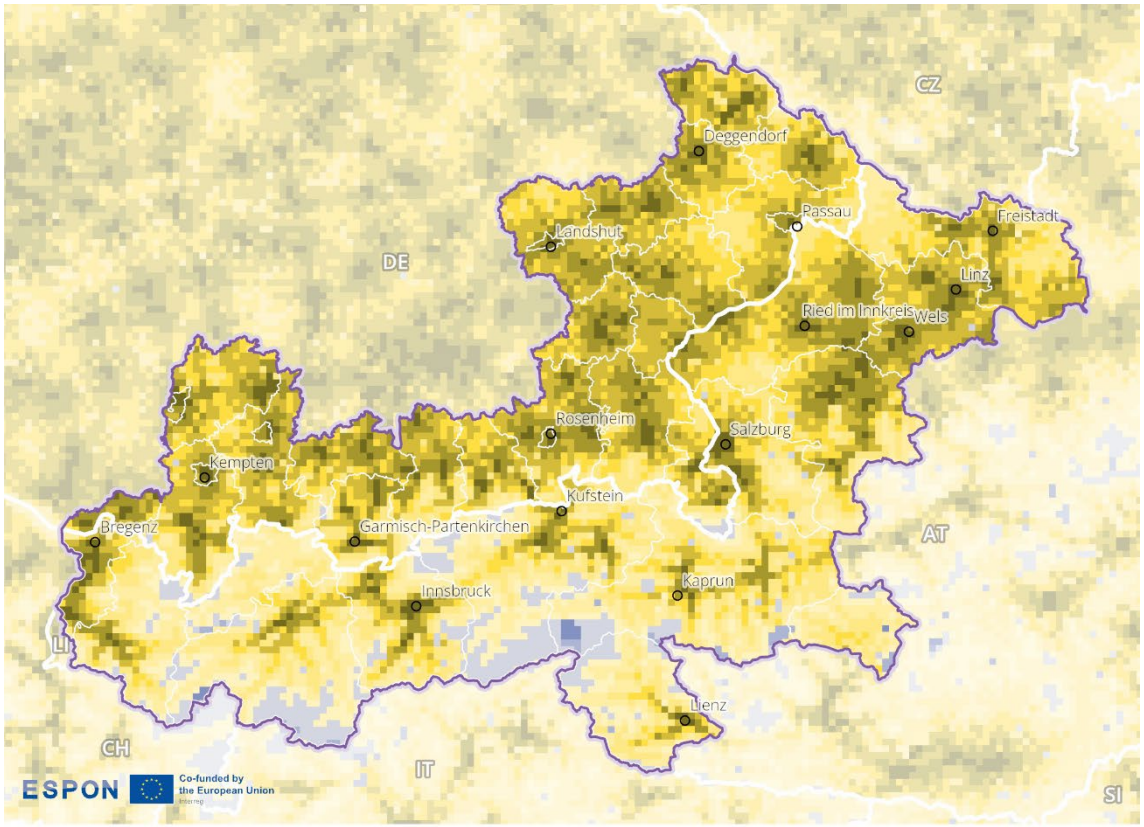
Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
national border
NUTS 3 border

0 25 50 km

© ESPON, 2026

Figure 2.35: Travel time to cinemas



Car travel time to the nearest cinema (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside outside of the Interreg VI-A perimeter

Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
national border
NUTS 3 border

0 25 50 km

2.4.4 Key messages on the socio-economic dimension

The border region shows a high degree of socio-cultural integration, but also reveals spatial disparities influenced by geography and sectoral dynamics. Social interaction levels are relatively balanced across the border, with moderate to high intensity in most areas, with no significant differences between countries. This reflects the shared language and cultural proximity that facilitate interpersonal exchange and remove linguistic barriers to integration.

Tourism is a defining feature of the region, with popular destinations on both sides of the border. However, the Austrian border regions record significantly higher numbers of overnight stays per capita. While this supports local economies, it also puts pressure on infrastructure, land use and local communities.

Access to services of general interest reveals a more fragmented picture. German regions generally provide high accessibility due to their flatter terrain and denser infrastructure. In contrast, Austrian regions, particularly those in the Alps, face considerable accessibility challenges, with essential services concentrated in valleys and limited by the mountainous geography.

2.5 Border security and safety

This dimension shows the security and safety conditions in border regions. It analyses the number of days on which border control is temporarily reintroduced at internal borders, using this as an indicator of security concerns and restrictions on cross-border movement.

2.5.1 Temporary reintroduction of border controls at internal borders

Indicator description

The indicator shows the number of days of temporary reintroduction of border control at internal borders, including the official reasons behind. The reintroduction of border control at the internal borders must be applied as a last resort measure, in exceptional situations, and must respect the principle of proportionality. The scope and duration of reintroduced border control should be restricted to the bare minimum needed to respond to the threat in question.

- **Source/method of retrieval**: Processing and analysis data of European Commission information pursuant to Article 25 and 28 et seq. of the Schengen Borders Code
- **Temporal coverage**: 2006-2025 (cut-off: 08 May 2025, in order to allow data treatment before work package completion)
- **Unit**: Days per year

Please refer to the technical annex for more information.

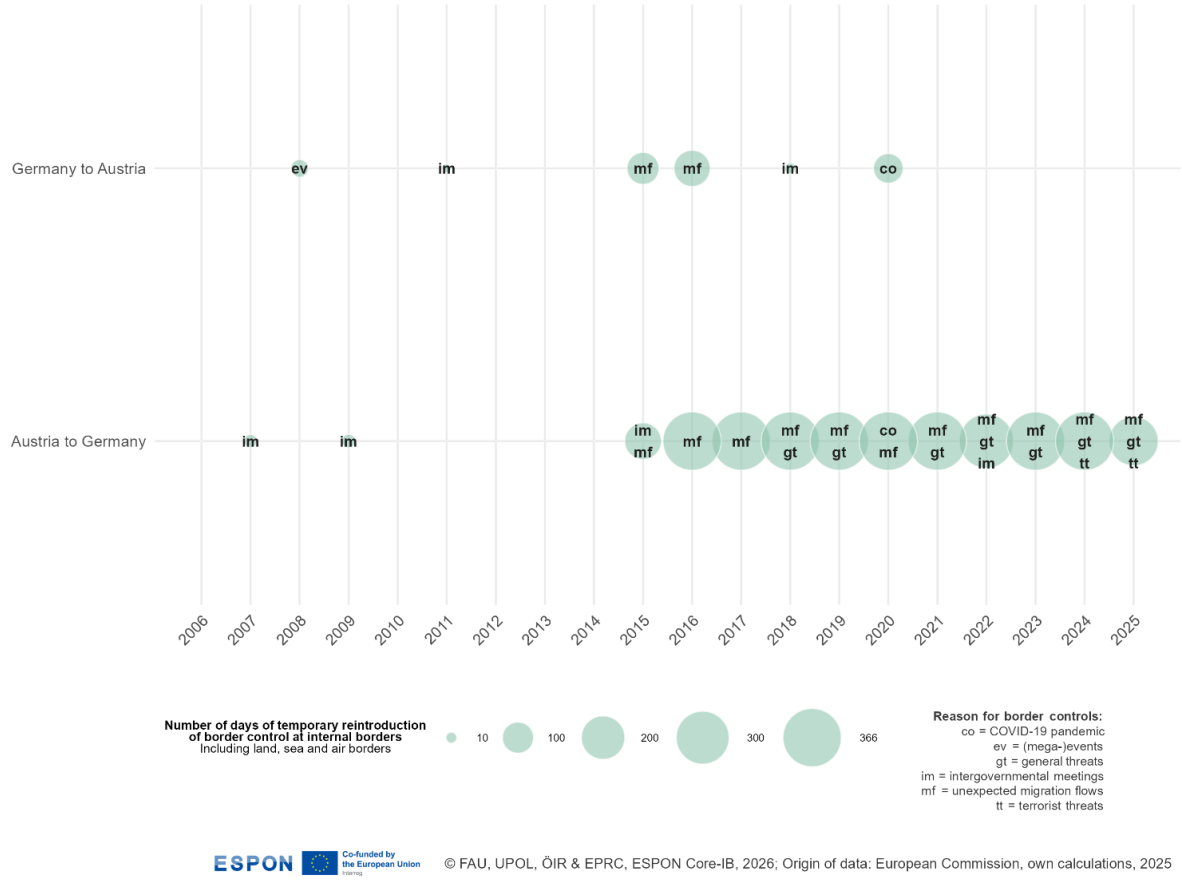
Figure 2.36 illustrates the number of days during which temporary border controls were reintroduced at internal borders within the Schengen Area. Each bubble represents a specific year with bubble sizes indicating the number of days the respective border was under control. The categories of reasons for reintroducing controls include:

- co – COVID-19 pandemic
- ev – (Mega-)events
- gt – General threats
- im – Intergovernmental meetings
- mf – Unexpected migration flows
- tt – Terrorist threats

The data spans from 2006 to 2025 (cut-off: 08 May 2025) and is based on notifications from the European Commission information pursuant to Article 25 and 28 et seq. of the Schengen Borders Code. In line with Schengen rules, the reintroduction of controls is to be used only as a last resort, for exceptional circumstances, and with strict adherence to the principle of proportionality—both in duration and scope.

Both, Austria and Germany had already been part of the Schengen Area by 2006.

Figure 2.36: Temporary reintroduction of border controls



The Germany-Austria border area is characterised by an asymmetric pattern:

- Crossing the border from Germany to Austria: Border controls occurred in 6 of 20 years, mainly tied to specific events like the EURO 2008, World Economic Forum 2011, migration influx (2015–2016), and COVID-19 (2020).
- Crossing the border from Austria to Germany: Temporary border control occurred in 13 out of 20 years, driven by a wide range of security and migration-related factors, including high-level summits (e.g., G7, NATO), persistent irregular migration (2015–2025), secondary movements, COVID-19 (2020), smuggling, and threats related to international crises such as the war in Ukraine.

From a comparative perspective, Germany has implemented controls for significantly more days than Austria, indicating an unequal impact on cross-border movement in one direction. These controls tend to have a tangible effect on the smooth functioning of cross-border flows, especially commuting and logistics, as they introduce delays and unpredictability.

2.5.2 Key messages on the border security dimension

The analysis of the temporary reintroduction of border controls in the border region highlights the challenges and potential of such controls, particularly their asymmetrical implementation. From a comparative perspective, Germany has imposed border controls for a significantly longer period than Austria, resulting in an uneven impact on cross-border movement. This imbalance reflects a structural weakness in cross-border governance, whereby unilateral national decisions can disrupt the daily functioning of a region that otherwise depends on mutual interdependence.

These controls have a tangible effect on the smooth operation of cross-border flows, particularly with regard to commuting and logistics. Frequent or prolonged controls cause delays and unpredictability, undermining the efficiency and reliability of these essential movements. Consequently, the indicator reveals a vulnerability in the region's cross-border integration, illustrating how easily well-established connections can be strained or interrupted in the absence of coordinated policy action.

2.6 Governance dimension

Structured cooperation through the cross-border area amplified with the accession of Austria to the EU in 1995. Some institutional cooperation at a broader geographical level started in 1972 via the Arbeitsgemeinschaft Alpenländer (ARGE ALP), the International Conference of the Lake of Constance or via the Alp Convention (entered into force in Austria and Germany in 1995). Along the border a number of Euroregions have been founded.

2.6.1 Cross-border cooperation

This sub-dimension identifies the extent of cross-border cooperation in the border region. It illustrates areas of high cooperation intensity and identifies functional links in governance structures across borders. It also identifies areas with high awareness of obstacles and the willingness and support services to overcome them, as well as areas where Interreg cooperation intensity is already strong.

2.6.1.1 Cross-border governance structures

Indicator description

The indicator shows active institutionalised cooperation that act as cross-border entities. It includes cooperation formats such as Eurocities, Euroregions, EGTC, cross-border associations, cross-border councils, etc.

- **Source/method of retrieval**: Localisation and categorising of cross-border cooperation formats (Eurocities, Euroregions, EGTC, cross-border associations, cross-border councils, conferences, working communities), based on desktop research.
- **Temporal coverage**: Status as of October 2025
- **Unit**: n/a

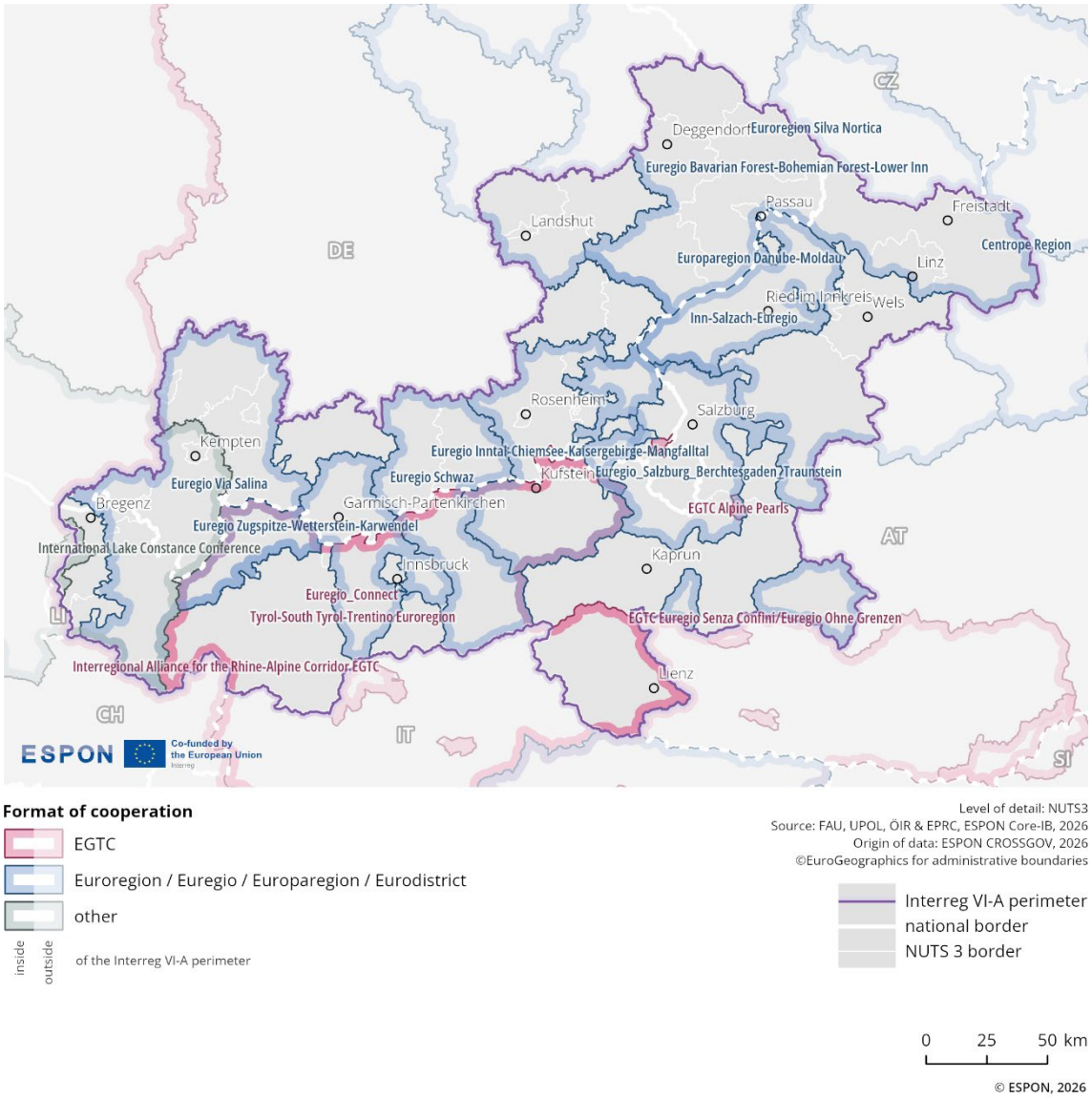
Please refer to the technical annex for more information.

Figure 2.37 shows the different types of institutionalised cooperation. These governance structures either function as cross-border entities or bring together stakeholders from the cross-border region around shared topics. The governance structures covered in this analysis include Eurocities, Euroregions, European Groupings of Territorial Cooperation (EGTCs), cross-border associations and councils. Project-based cooperation is not included.

The coloured markings on the map indicate different types of institutionalisation: EGTCs are shown in red, Euroregions/Euregios/Europaregions/Eurodistricts in blue, and other formats in grey.

The multi-level governance structure in this programme area shows broad spatial coverage along the borders. Overall, the region exhibits a high level of institutionalised cooperation along the national border, within relatively small perimeters. The Euregios are the most prevalent format.

Figure 2.37: Cross-border governance structures



2.6.1.2 Cross-border public services

Indicator description

The indicator shows different services specialised on cross-border challenges and development potential, including their domain of operation. As a specific form of services of general interest, cross-border public services (CPS) address joint problems or development potentials of border regions that are located on different sides of one or more national borders.

- **Source**: ESPON cross-border public services (CPS) 2.0 database
- **Temporal coverage**: 2022
- **Unit**: n/a

Please refer to the technical annex for more information.

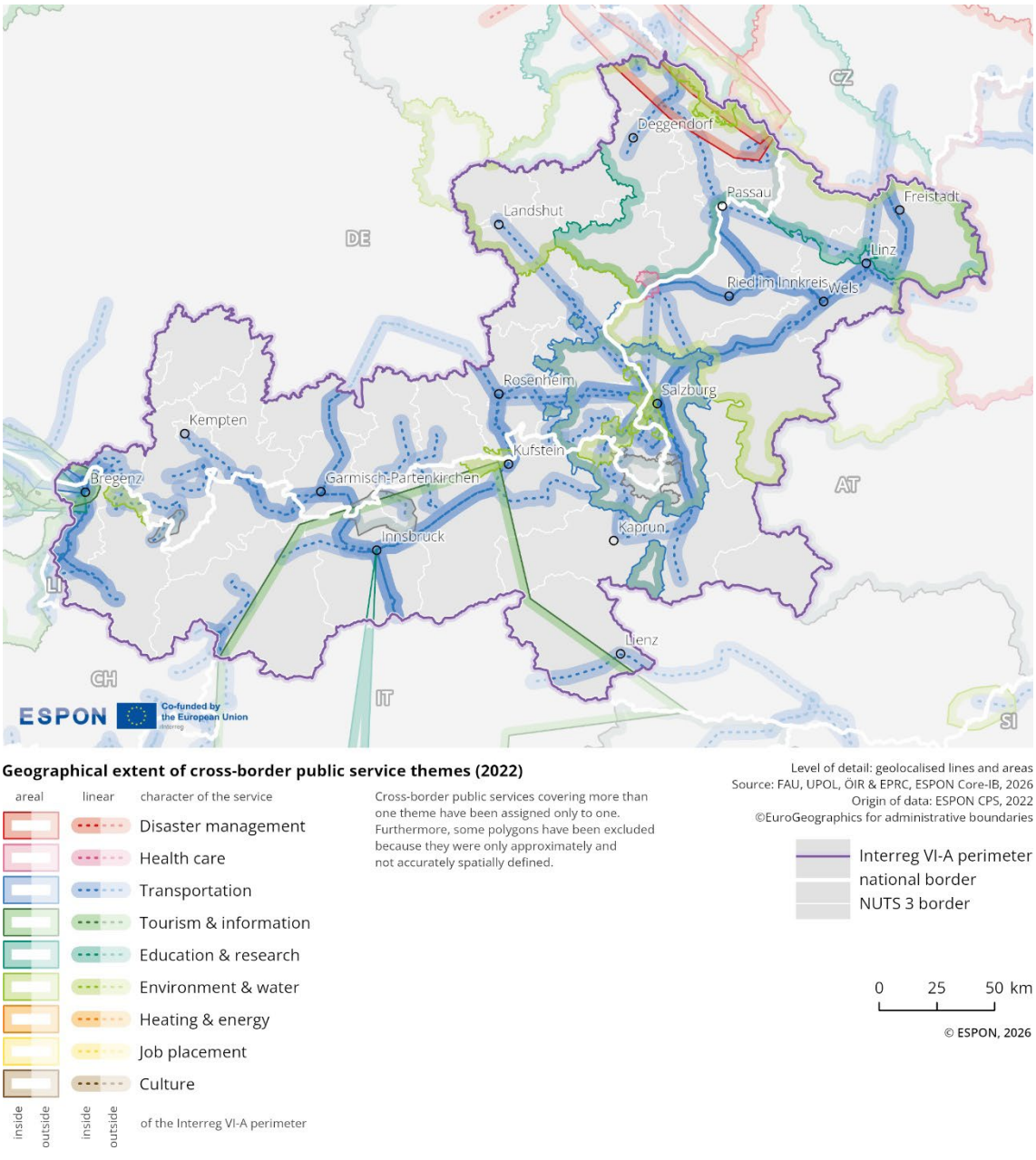
Figure 2.38 depicts the geographical extent of cross-border public services in the border area in 2022. Different thematic areas are represented by distinct symbols and colours, indicating services such as disaster management, health care, transportation, education, environment, energy, job placement, and culture. The visualisation highlights where these services operate across the national boundary.

Cross-border public services in the Austria-Germany Interreg region are spatially extensive and dominated by transportation connections, especially dense around Salzburg, Innsbruck, and Rosenheim.

There are notable tourism & information services around Kufstein-Garmisch-Partenkirchen, reflecting Alpine cooperation, while education & research hubs emerge near Passau-Linz and Salzburg. Environment & water services are limited but present in focused nodes, especially east of Salzburg.

Public services extend deeply into Germany's Bavaria, Austria's western federal states, and marginally touch northern Italy, with isolated transport links reaching into Italian territories.

Figure 2.38: Cross-border public services



2.6.1.3 Perceived cross-border obstacles in b-solutions

Indicator description

The indicator shows cases of legal or administrative obstacles selected in the framework of the b-solutions initiative. This indicator lists the number, location and nature of suggested solution of cases in the b-solutions initiative, including the topic and parties involved.

- **Source/method of retrieval**: Processing and analysis of the b-solutions initiative data
- **Temporal coverage**: 2018-2025 (first quarter)
- **Unit**: n/a

Please refer to the technical annex for more information.

The b-solutions initiative is a European Union project that supports the resolution of legal, operational and administrative cross-border obstacles. It offers funding for pilot actions and legal expert advice in border regions. A high level of cross-border integration often reveals strong barriers of cross-border functioning. In order to exploit the cross-border potentials, these obstacles have to be overcome or at least addressed. Both the number of reported obstacles and the general interest in solutions serve as important indicators of cross-border interaction.

As part of the ESPON CROSSGOV project, all b-solutions initiatives were analysed to deepen the understanding of the thematic focus of the perceived cross-border obstacles across different border regions and the suggested solution, in particular from the European perspective.

In the border area of Austria–Germany/Bavaria, 6 b-solutions pilot actions were identified. These included initiatives on cross-border public transport and ambulant therapeutic services, renewable energy plant operation and distribution formats, home office employment across borders, alternative uses for processing and exchanging sheep's wool, and cross-border (further) education. Applications for these pilots were mainly submitted by Euroregions.

In this border area, in the field of transport and mobility, issues relate to road transport, bus services, urban mobility networks, and sustainable transport. Governance and institutional cooperation touches on EGTCs, administrative procedures, and citizen participation. Health and social security challenges include social security coordination, health insurance, and cost reimbursement. Regarding energy and environment, the challenges are in renewable energy, infrastructure, recycling, and the preservation of nature and biodiversity. In terms of labour market and employment, relevant obstacles include remote work, simultaneous employment in multiple countries, taxation, recognition of skills, education systems, and talent acquisition. Economic development and innovation relate to entrepreneurship, innovative technologies, local products, tourism, and digitalisation (mostly data exchange).

The solutions proposed in the pilot actions are predominantly legal or hybrid in nature. For example, the cross-border public transport project involved administrative measures, such as improving organisational structures, standardising transport provision, and harmonising ticket and tariff systems, as well as operational solutions like information sharing and digital services. The ambulant therapeutic services initiative proposes legal and contractual agreements between Austrian and German health insurance funds and service providers. Addressing renewable energy plant operations required changes in both EU and national legislation. The home office case combined operational adjustments to social security and labour contract administration with proposed changes to the EU legal framework. The sheeps' wool initiative focused on compiling legal information and establishing bilateral administrative exchanges. Finally, the education-related pilot proposed legal modifications to EU directives, updates to bilateral diploma recognition agreements, a review of funding schemes, and the creation of a regional information hub supported by Interreg and further analysis.

2.6.1.4 Institutionalised advice centres for cross-border issues

Indicator description

The indicator shows where institutionalised advice centres on cross-border issues are located, including their thematic focus and geographical perimeter.

- **Source/method of retrieval**: Localisation and thematic focus of advice centres for cross-border issues are identified via desktop research.
- **Temporal coverage**: Status as of February 2025
- **Unit**: n/a

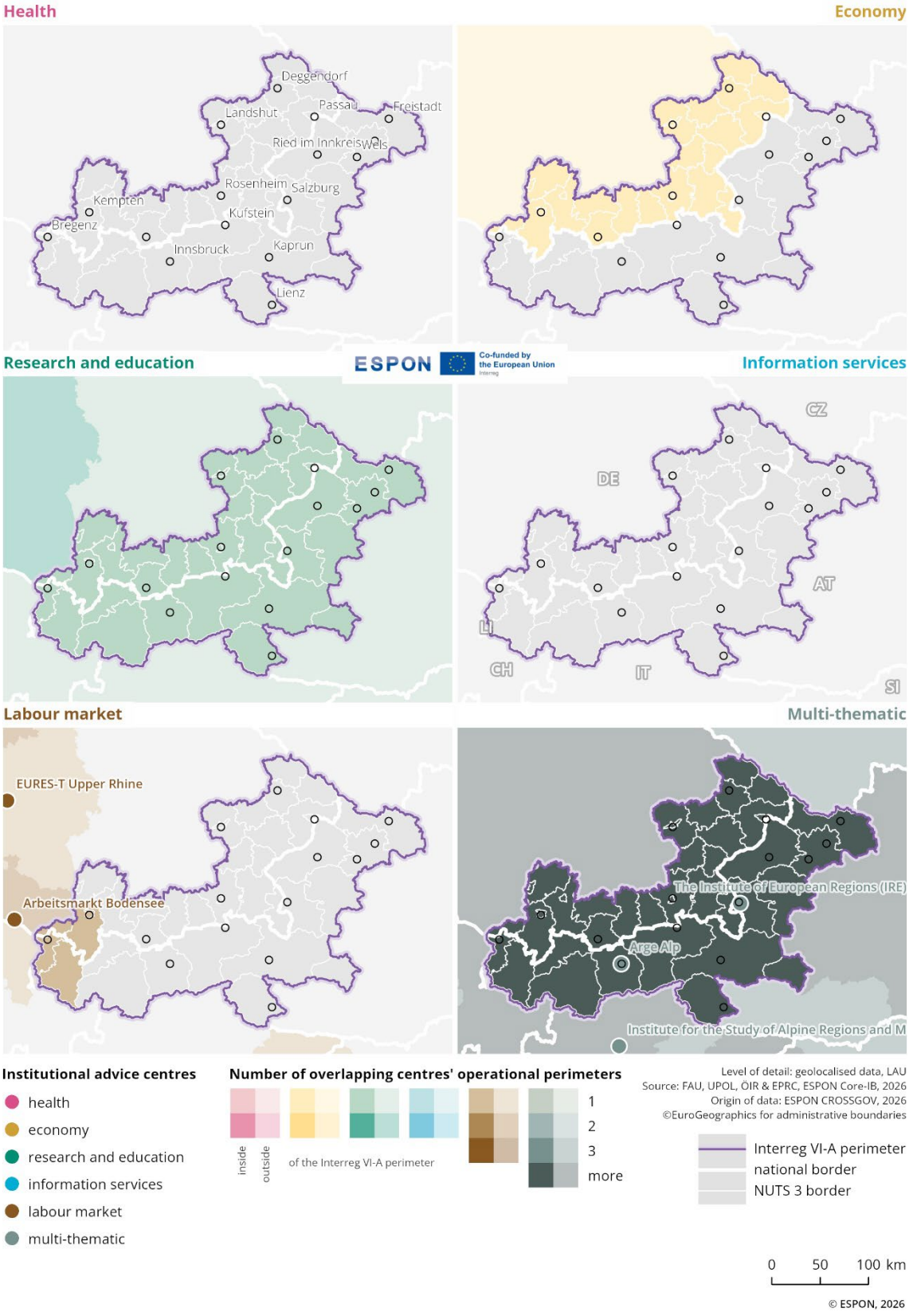
Please refer to the technical annex for more information.

Figure 2.39 shows the locations and types of institutionalised advice centres, along with their operational domains, in the cross-border Interreg region between Austria and Germany/Bavaria. These centres throughout Europe provide support in various fields such as health, economy, research & education, information services, the labour market, and multi-thematic issues. The operational domains of these centres are also indicated by coloured shading on the map. The more intense the colour, the stronger the influence of that specific domain in the corresponding area.

There are 2 multi-themtic institutionalised advice centres, both located in the Austrian part of the Interreg region: Arge Alp in Innsbruck and the Institute of the Regions of Europe (IRE) in Salzburg.

Centres with multi-thematic, as well as research and education operational domains, are equally represented in both countries within the Interreg area. Economic operational domains span mainly the German part of the Interreg region. In the western part of the region, there are also some labour market operational domains in both the German and Austrian part.

Figure 2.39: Institutionalised cross-border advice centres



2.6.2 Outline of Interreg activities

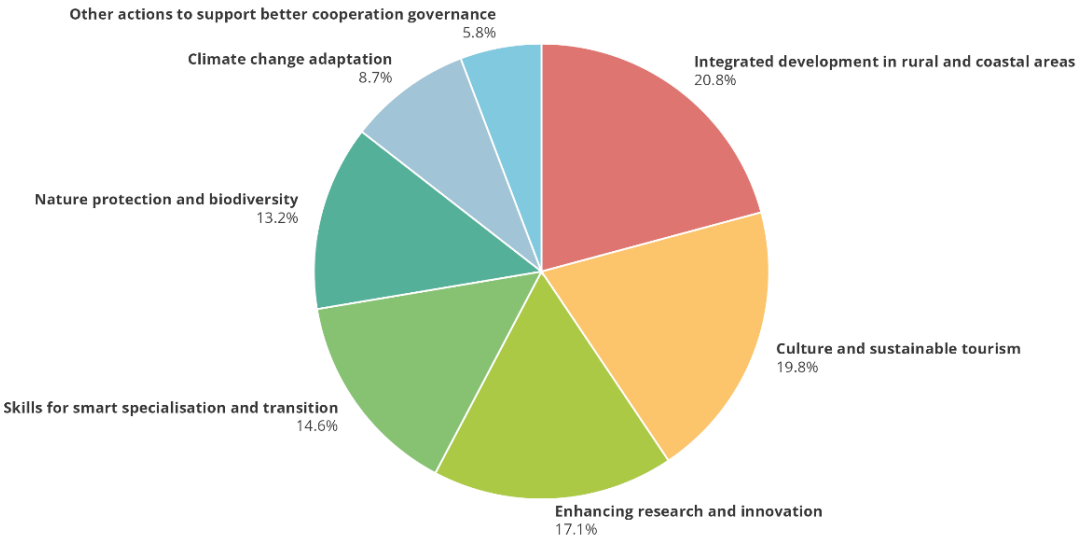
The following section outlines the key Interreg activities in the 2021-2027 programming period. The aspects included concern the development opportunities and challenges identified (see Table 2), the budget available and split of allocation (Figure 2.40), overlapping Interreg programmes and the key aspects drawn from the programme.

Table 2: Interreg VI (2021-2027): Opportunities and challenges

Topic	Key development opportunities and challenges identified for Interreg 2021-27
Physical Environment	▪ Characterised by a high degree of heterogeneity, which impacts on e.g., greatly varying population densities
Population	▪ Population growth, mainly due to migration, but declines in rural areas ▪ Ageing population
Research and Innovation	▪ High level of innovation capacity of the economy in several sub-regions of the programme area ▪ Diverse higher education landscape that actively and regularly collaborates with businesses ▪ Lack of compatibility in thematic focus between public research institutions and regional companies
Economy	▪ Area shows above-average shares and, above all, strong growth in the secondary sector
Employment	▪ Unemployment rate in the programme area reached a record low ▪ Challenge for the programme area will be to meet the growing demand for skilled workers
Environment, climate, energy	▪ Boasts high-value natural resources ▪ Variety of challenges in the field of environmental and climate protection ▪ Ambitious targets for the use of renewable energies and increased energy efficiency ▪ Renewable energy sources in final energy consumption are high and continues to rise
Transport	▪ High degree of centrality within Europe. Despite its challenging geographical conditions, it is crossed by important north-south and east-west connections

Total Budget: EUR 76,933,797.99

Figure 2.40: Split of Interreg allocation



ESPON Co-funded by the European Union

Table 3 shows the number of Interreg 2021-2027 cross-border and transnational programmes which share at least one NUTS3 region with the border area. Each programme has its own distinct rationale, value and territorial focus. However, for the purposes of, for example, planning and capitalisation activities it is potentially helpful for programmes and programme stakeholders to be aware of and connected to other Interreg programmes with which they share a direct territorial link.[16] The 4 Interreg C programmes Interreg ESPON, Interact, Interreg Europe and URBACT (Urban Action) cover the whole EU territory and provide a range of joint services and initiatives.

Table 3: Shared geographies with other cross-border and transnational programmes

Interreg A (cross-border)	Interreg B (transnational)
4	4

Key aspects

- The programme aims at boosting the region's innovative capacity and sustainable economy, and at promoting a resilient environment, a sustainable tourism and an integrated regional development.
- Some regions in the programme area also participate in other Interreg programmes. These include the Alpine Space, Central Europe, Danube and North West Europe Interreg B programmes and the Italy-Austria, Germany/Bavaria-Czechia, Austria-Czechia and Germany-Austria-Switzerland-Liechtenstein Interreg A programmes.

[16] It is noted that synergies and links with a wide range of other territorial cooperation and sectoral programmes and initiatives are also valuable and this is reflected in the wider analyses presented in this border profile, but not specifically covered in this table.

2.6.2.1 Interreg cooperation

Indicator description

Based on the keep.eu database, this indicator illustrates the network density of Interreg V-A (2014–2020). It is derived from the geographical location of all partners within a project consortium and reflects the intensity of cooperation between them. For the analysis, project networks were visualised by drawing lines between the locations of partners within a consortium. These connections were subsequently aggregated and spatially abstracted by calculating line density using GIS software. Dark red areas indicate a high density of connections between project partners, while yellow areas represent a lower density of cooperation links.

An additional element in this section is the development of project partner numbers between Interreg IV-A (2007–2013) and Interreg V-A (2014–2020), based on data from the keep.eu database. The datasets were cleaned to remove duplicates, using the partner names as reported in keep.eu. For both programming periods, keep.eu indicates a high level of data completeness[17]. Nevertheless, this development should be interpreted as indicative, as variations in partner name reporting and general limitations regarding the representativeness of the dataset affect the robustness of the results.

- **Source/method of retrieval**: Processing and analysis of the keep.eu database
- **Temporal coverage**: 2007-2013 (Interreg IV-A), 2014-2020 (Interreg V-A)
- **Unit**: n/a

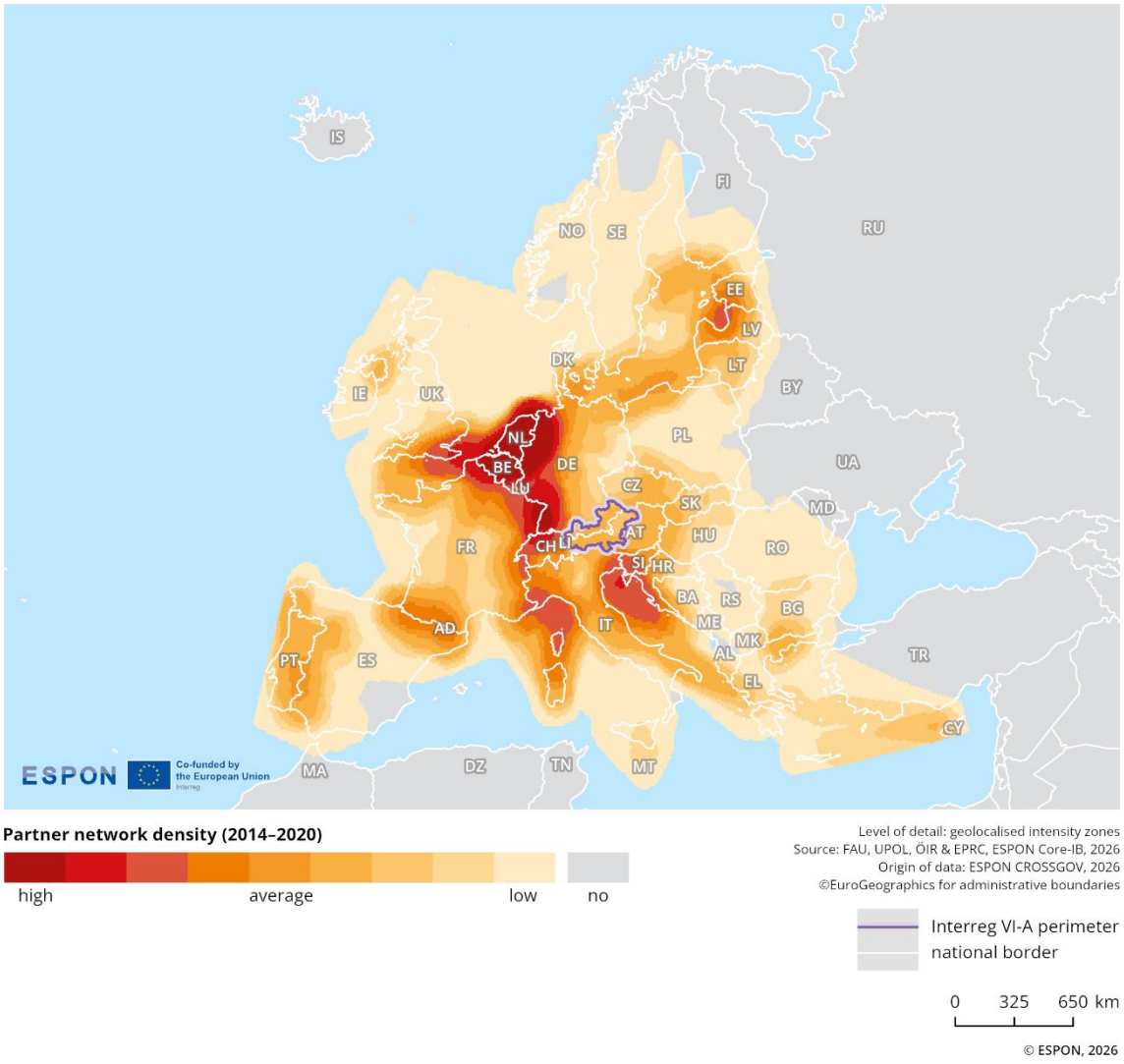
Please refer to the technical annex for more information.

Cooperation activities and networks are among the most meaningful types of information for delineating cross-border functional areas. As such, the indicator on cooperation through Interreg can help to identify networks among cross-border actors and highlight the density of cooperation in specific border segments.

Figure 2.41 shows the density of Interreg V-A (2014–2020) partner networks. The indicator includes the location of, and links between, Interreg project partners within a project consortium. From a European perspective, partner network density in the Austria–Germany/Bavaria border area appears quite evenly spread. No specific border segments within the programme area show significantly higher or lower network levels than others. The partner network density in this border area is close to the European average. Based on the keep.eu database and excluding duplicates, the number of project partners increased from 187 in Interreg IV-A (2007–2013) to 213 in Interreg V-A (2014–2020), an increase of about 14%. It is important that these changes are considered in the context of factors such as change in programme budgets between 2007-2013 and 2014-2020, emphasis on targeting impact, and numbers of strategic projects.

[17] see Keep.eu representativeness: Interreg, Interreg-IPA and ENI cross-border

Figure 2.41: Interreg V-A partner network density



2.6.3 Key messages on the governance dimension

This border region is characterised by multifaceted cross-border cooperation, supported by dense institutional frameworks, functional links and a high level of awareness of legal and administrative obstacles. However, this strength also highlights areas where cooperation remains fragmented or overly dependent on project-based formats.

Institutionalised cooperation is widespread, particularly in the form of Euregios and EGTCs, which ensure continuous stakeholder engagement along the entire border. These governance structures facilitate regular cooperation in areas such as tourism, education, and mobility. The density of cross-border public services, particularly in transport, tourism, and education, reflects high functional interdependence. These services are strongest around Salzburg, Innsbruck, and Passau-Linz. Nevertheless, challenges persist, particularly with regard to health, energy, and labour market coordination. This is evident in the wide range of b-solutions pilot actions, which address issues such as cross-border healthcare, renewable energy, and teleworking. While the variety of issues addressed signals strong integration, it also highlights persistent systemic gaps requiring legal or structural solutions. The presence of institutionalised advice centres in both countries further supports integration efforts.

Although Interreg activity and project networks demonstrate stable growth and extensive coverage, the overall density of cooperation remains close to the European average. While the increasing number of partners and interlinkages signals progress, it also highlights the continued potential to transition from project-based cooperation to long-term institutionalised cooperation.

3 Summary and key observations

To support the strategic dialogue on cross-border cooperation beyond 2027, this territorial analysis provides harmonised and comparable information. Its data-driven evidence helps to inform the future direction of cross-border cooperation by facilitating alignment with EU priorities and the evolving regulatory framework. The Core-IB border profiles adopt a harmonised methodology and provide programme areas with access to recent European data. As this approach comes along with limitations, member states may hold additional or more detailed data which can further enrich or contextualise the findings beyond the Core-IB project (see final report and technical annex of this project). These national sources are essential for refining and validating territorial evidence in policymaking processes, including: a) regional, fine-scale data and b) insights from political processes related to prioritisation and objective setting. The study's findings are analytical and are intended to support reflection and discussion. They do not create regulatory or policy obligations for Member States, the European Commission, or programme authorities.

Table 4 provides 2 types of information. Firstly, it summarises the key analytical findings for the border region, as discussed earlier in this profile. Secondly, it suggests policy options based on the analytical findings. These options are intended to provide a practical and informative basis for the strategic dialogue among programme bodies, managing authorities and the European Commission.

Generally speaking, the aim of cohesion policy is to promote harmonious territorial development (also) across borders. The objective is to mitigate the impact of borders and achieve 360° functionality, thereby enhancing the quality of life and fostering prosperous development on both sides of the border. The upcoming Interreg period offers an opportunity to address these objectives and potentials through targeted cooperation projects.

Table 4: Evidence-based conclusions

Territorial dimension	
Key analytical findings	• The border region (6.1 M inhabitants, +6.1% growth 2014–2024) shows strong demographic growth, with Austrian settlement concentrated in valleys and German settlement more evenly spread; • Population and settlement growth cluster around key cities (e.g., Linz, Salzburg, Innsbruck, Passau) and corridors like the Inn Valley, creating functional pressures on land, housing, and infrastructure with cross-border relevance; • Accessibility is generally high, but uneven: strong rail links exist (e.g., Passau-Wels, Rosenheim-Salzburg), while car travel dominates in less connected, mountainous areas; service provision is more centralised in Austria and relatively evenly distributed in Germany.

Territorial dimension	
Policy options	**Population and settlement related aspects** • A highly relevant policy option is to address the pressure from demographic growth in some parts in the border region through cross-border exchange and strategy formulation on spatial and service-planning policies. The aim is to balance uneven settlement patterns and promote balanced territorial development; • Strategy development to concentrate settlement dynamics around cities and transport corridors, aiming at sustainable spatial development. Develop a common understanding of cross-border polycentric functionalities; • Organise knowledge spillovers and exchanges on cross-border spatial development can help reduce pressure on land use, housing and infrastructure. **Accessibility related aspects** • The territorial evidence has shown that there are accessibility issues in the border region. There is potential in territorial cooperation to explore ways how to close border related gaps, in particular with ragard to univen uneven rail and road connectivity; • Strategy development, pilot projects and knowledge exchange can explore the obivoius potentials of 'last-mile connectivity' in mountainous areas and help reduce car dependency; • A focus can be on strengthening cross-border rail links (e.g. Passau–Wels, Rosenheim–Salzburg) as strategic backbones for sustainable mobility and cross-border commuting through coordinated planning and investment. **Cross-cutting aspects** • The integration of demographic growth considerations with climate resilience and infrastructure planning through coordinated cross-border strategies and policy exchange; • Strengthening cross-border coordination of spatial planning, housing policy, and risk management, particularly in fast-growing urban corridors.

Economic dimension	
Key analytical findings	• The border region shows high GDP per capita and stable employment; slower GDP growth since 2014 and a shrinking working-age population raise concerns over competitiveness, labour supply, and long-term sustainability; • Economic structure is shifting from traditional industries to services, education, and health, though benefits are uneven across subregions; cross-border labour mobility and telework highlight integration but also rely on addressing digital and transport disparities; • While the region functions economically as a bridge rather than a barrier, challenges remain around demographic decline, uneven digital infrastructure, and high housing costs that may constrain future cohesion and resilience.
Policy options	**Competetiveness related aspects** • A focus could be on strengthening cross-border cooperation frameworks to accelerate the transition towards knowledge-intensive services and digitalisation in the border region; • The exploration of cross-border telework hubs and shared innovation infrastructure as instruments to mitigate digital asymmetries and transport bottlenecks. **Cross-cutting aspect** • Addressing high housing costs and uneven digital networks through integrated cross-border spatial, housing, and digital planning to enhance the overall attractiveness of the border region for businesses and residents.

Green dimension	
Key analytical findings	• The border region shares strong environmental interdependence through protected areas, natural risks, and interconnected energy systems, creating both opportunities for cooperation and challenges in management; • Key contrasts emerge: Austria shows lower but more uneven air pollution levels, higher landslide exposure, and grid constraints shaped by topography, while Germany shows more consistent pollution levels, stronger performance in resource productivity, and waste reduction; • Common vulnerabilities (e.g., floods along the Inn and Danube) and joint assets (e.g., hydropower, contiguous Natura 2000 sites) underline the potential for integrated cross-border approaches to risk management, conservation, and circular economy transition.
Policy options	**Climate risks and resilience related aspects** • A relevant policy option is to strengthen cross-border management of protected areas and energy systems to enhance climate resilience and improve resource efficiency; • Cooperation projects could address common climate-related vulnerabilities, such as flood risks along the Inn and Danube rivers, as a basis for coordinated cross-border risk management, including early warning systems and adaptive infrastructure planning. **Cross-cutting aspect** • Addressing asymmetries in air pollution, landslide exposure, and resource productivity through tailored yet cross-border coordinated transition pathways.

Socio-economic dimension	
Key analytical findings	• The border region shows strong socio-cultural integration supported by shared language and cultural proximity, with balanced social interactions across the border; • Tourism is a key strength but unevenly distributed: Austria records far higher overnight stays, boosting local economies but straining infrastructure and communities, while German regions face comparatively less pressure; • Service accessibility is more balanced in Germany, while Austria's mountainous geography limits service provision to valley locations.
Policy options	**Cross-cutting aspects** • A focus could be on building on strong socio-cultural integration to reinforce cross-border cooperation in labour markets, education systems, and service provision; • Cooperation projects could focus on leveraging cultural proximity to address digital inequalities and support the transition towards a low-carbon economy.

Border security and safety dimension	
Key analytical findings	• Temporary border controls in the border region have been applied asymmetrically, with Germany imposing them longer than Austria; • These controls disrupt commuting and logistics by causing delays and unpredictability.
Policy options	**Cross-cutting aspects** • The impacts of border controls on cross-border commuting and logistics can be mitigated through coordinated and institutionalised cross-border policy dialogue; • The mitigation of border control effects can form part of cross-border cooperation projects in various sectors. Economic networks, transport infrastructure initiatives and tourism-related actions can incorporate considerations related to the impacts of border controls.

Governance dimension	
Key analytical findings	• The border region has a dense cross-border cooperation landscape, with strong institutional frameworks (Euregios, EGTC) and functional services, especially in tourism, education, mobility, and transport; • While institutional advice centres, Interreg activity, and pilot projects demonstrate integration potential, legal and structural obstacles remain to bear further potential in cross-border cooperation.
Policy options	**Cross-cutting aspects** • The support of Euroregions in using existing institutional cross-border frameworks to drive cooperation in functional areas with persistent asymmetries, such as housing, digital infrastructure, and the circular economy; • Strengthening cross-border governance structures to develop integrated solutions to shared challenges in energy, transport, land use, nature protection, and demographic change.

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