

Oberhausen case study report

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1. Introduction

This case report gives a brief and provisional summary of our empirical findings on fiscal policy in Oberhausen. The first two chapters are based on statistical data and existing literature and describe the socio-economic situation, the political actor constellation and the fiscal challenges. Chapters four and five review our own empirical findings on how local actors perceive fiscal problems and their explanation as well their view on the local scope of action and the concrete consolidation measures, including the assumed impacts. These chapters are purely descriptive and include several quotations and data derived from our MAXQDA analysis as illustration. In the following chapters, the relevant analyses and interpretation of researchers are discussed. We also discuss the policy and leadership styles, the different kinds of legitimacy, the local political culture, knowledge types and new approaches influencing fiscal policymaking. In chapter eight a new perspective will be added that of new actions related to social cohesion and economic development. A detailed discussion of our theoretical and methodological approaches, see our scientific book publication (Stolzenberg et al. 2016).

As of November 16, 2016, the empirical corpus of the Oberhausen case includes:

- interviews with 8 actors: deputy mayor of economics, head of the social and fiscal department, two councilors and one general secretary of the local council, one representative of the department for cultural affairs of the city and the CEO of the municipal business development agency
- 190 texts from the local press, party manifestos, coalition treaties, press releases and publications of interest groups

2. Socioeconomic features of the City of Oberhausen

Oberhausen (with a population of 209,292 that is declining, Bertelsmann Stiftung) is a medium-sized city in the Metropolitan Ruhr area, an area with about 10 million inhabitants, of which half of are members of the institutionalized planning organization Regionalverband Ruhr (Petzinger et al. 2009). Given its population of 260,000 in the 1960s, Oberhausen is rapidly shrinking. The city has also gained attention as the “German Detroit” (Handelsblatt August 20, 2013).¹ Despite its notoriety in the media, Oberhausen has the highest debt per capita in Germany, almost €9,000 (Ernst and Young 2016, Schlüter 2016). Like Wuppertal, it is trapped in a “feeling of futility” (in German: Vergeblichkeitsfalle) but with even poor prospects on how to overcome this situation. The financial crisis thus reveals the deeper crisis of the city, which can be called an “identity crisis” (in German: Sinnkrise) (Dellwig 2012b: 523).

Oberhausen is an old city (Körner-Blätgen and Sturm 2016: 10), but also a young city. It is an old city because former villages such as Alt-Oberhausen can be traced back to the middle ages. These villages were fragmented settlements without any city center. Oberhausen became a

¹ It is interesting that in this article, as in others, Oberhausen is mentioned in the headline but refers to a German wide survey. A counterexample is the report "Wat willste?" published in the Süddeutsche (Dörris 2016).

city in 1874 by merging these settlements, but the decisive event happened 30 years earlier: the building of train station in the middle of nowhere (in German: “in öder Heide”) (Kamp 2012: 151-152). This train station was a driving force behind development of the area and especially the settlement of industrial sites such as coal and steel companies. To put it in exaggerated terms, Oberhausen was founded to benefit the newly developed Prussian industry. It is a central feature of the Prussian industry policy of that time to build infrastructure for (heavy) industry sites and to embed them within political structures by founding new cities (Dellwig 2012a: 99). This causes rapid but uncoordinated urban development such as that witnessed in Oberhausen (ibidem: 113ff.). This uncontrolled growth made planning an urban center a major challenge due to the poly-centering structure without a traditional city center (ibidem: 125). Thus, Oberhausen remains an “artificial” urban center compared with European standards. The real estate speculation and industrial pioneering were driving forces behind the use of land around the old villages in this area (Günter 2012).

At the beginning, the main focus was on building infrastructure. Seen in this light, Oberhausen is a model city because it meets all needs of the newly created industries (water canal, railways and roads). The rapid growth of infrastructure and urban space led to the founding of a municipality, which quickly became professional. As a result, financial issues became a key element in understanding the history of Oberhausen (ibidem 198): The municipality was founded in order to build up infrastructure, not so social payments could be made to the rapidly growing working class. Indeed, the attitudes of the petit middle class became dominant, such as its tendency toward austerity (ibidem). That is why the city levied high property taxes and low taxes on industry. The local politics were blocked and the municipal budget was highly dependent on the economic cycle (ibidem: 211).

The growing industry needed workers and the number of inhabitants increased at the same pace industry grew. Oberhausen’s population passed the 100,000 mark in 1915 (ibidem: 129). Thus, most of the inhabitants were workers until the 1950s. Consequently, Oberhausen was and still is a stronghold for the Social Democratic party and the trade unions.² After that and with a growing service sector, the middle class became a factor in the city. Another important social factor is the influx of migrants. This has been a central feature of the city right from the beginning. Expressed in different terms: “without migration, no Oberhausen” (Benneh-Oberschewen and Telli 2012).

The central features of the city are formative today, even after economic restructuring. For instance, Oberhausen still has a high share of employees in the industrial sector and has no tertiary educational institutions (see Kribach 2012). Its rapid growth gave Oberhausen stature, but it is surrounded by other Ruhr cities and has all most no access to surrounding countryside. The question of the city center is solved by a big mall, Centro, which is viewed as a bold experiment in redeveloping and revitalizing former industrial sites, as a strategic step in coming to terms with economic restructuring and fighting unemployment (Helmer-Denzel 2002).³ It is questionable and also hotly debated if this can decouple the municipal finance

² It is worth noticing that Oberhausen had a female Lord Mayor from 1956 until 1979.

³ Oberhausen participated in the IBA Emscher Park (1989-1999), an international construction exhibition. Another highlight is the transformed gasometer, which is an exhibition hall now.

from economic cycles.⁴ The socio-economic data shows that Oberhausen still has a high rate of unemployment and social welfare recipients. At the same time, disposable primary household income is notably lower than in North-Rhine-Westphalia and Germany. Thus, the Centro and the new service oriented industries are partly welcomed because they create new jobs, make the city greener and open up a new perspective for the city (Wood 2003 and 2001). The final argument in particular is important because the former underdog has become important due to its favorable location (Helmer-Denzel 2002: 139).⁵

Table 1: Socio-economic data of Wuppertal

		Oberhausen	North Rhine-Westphalia	Germany
Unemployment rate	in %	12.1	8.1	6.5
Social welfare rate	in %	12.1	5.9	4.5
Disposable household income	in € per capita	14,200	20,056	19,933
Primary household income	in € per capita	19,676	23,539	23,278
Share of employees in industrial sector	in %	23.4	19.7	20.4
Share of employees in service sector	in %	76.5	75.1	73.4

Sources: Unemployment rate and social welfare rate (12/2013): Bundesagentur für Arbeit; disposable household income (2011): Statistische Ämter der Länder 2012, employees in economic sectors (2012): Statistische Ämter des Bundes und der Länder 2012.

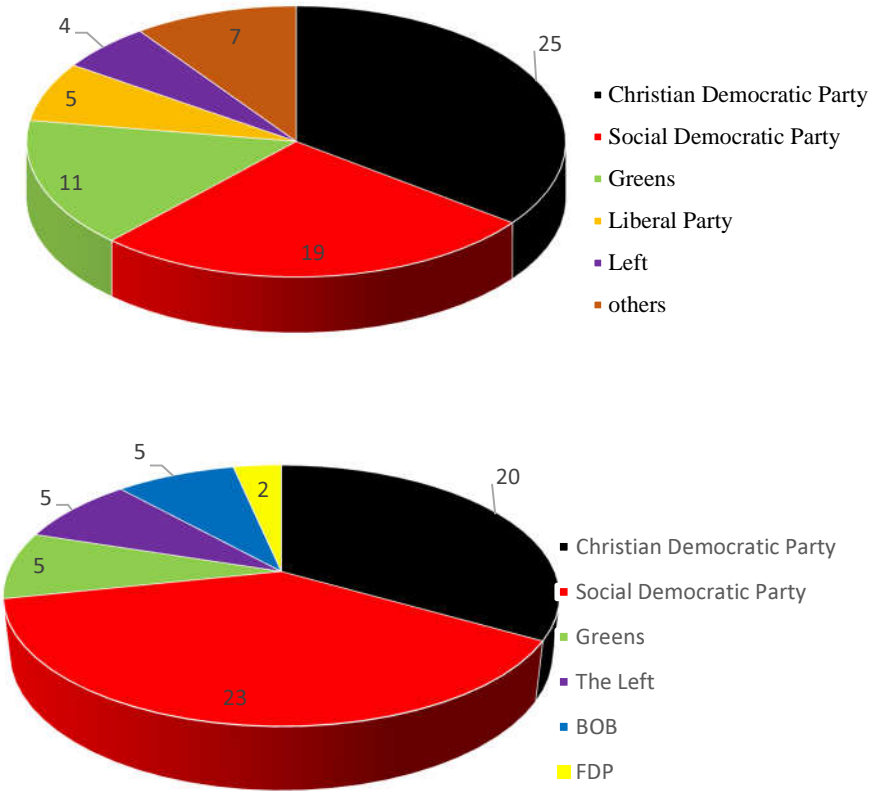
3. Municipality of Oberhausen: Political leadership and the fiscal problem

The city of Oberhausen has been governed by a coalition consisting of the Social democratic Party, Green Party and the Free Democratic Party since 2014. They have a one seat majority including the vote of the Lord Mayor, a Christian Democratic council member and Lord Mayor since 2015 and this marks the start of cohabitation. Oberhausen is an old Social Democrats stronghold but that party failed to succeed in the last lord mayor elections. Thus, their voter basis is shrinking while it remains the dominant party of the local party system. The new, young Lord Mayor is the first non-social democratic mayor since 1956 and he was elected with low voter turnout for the election. Despite this new constellation, the coalition decided to proceed with the existing coalition. The treasurer, a Social Democrat of Greek origin, has been in office since 2010 and, in contrast to the Lord Mayor, is an experienced and highly visible executive. The treasurer opposed the social democratic mayor the last elections. The actor constellation in Oberhausen is characterized by a new generation of professional politicians who have attempted to overcome fiscal problems, like the new lord mayor and his competitor the treasurer. Thus, the council opted for continuity even with a difficult constellation. The administration is experienced with restructurings but faces a visible opposition by the workers council and the labour unions.

⁴ The loss of thousands of workplaces are partly compensated by the new jobs created around the Centro. 15,000 new jobs compensate only a part of the over 60.000 workplaces in the industry (see Schlüter 2016).

⁵ Nevertheless, the advantage and disadvantages are disputed. For instance, the old city center is nearly deserted. Insofar the Centro seems to be an attempt to transplant an artificial center and replace an old one ("Einer kranken Stadt ein künstliches neues Herz" einsetzen" Westdeutsche 12.9.2016). This is somehow the story of Oberhausen.

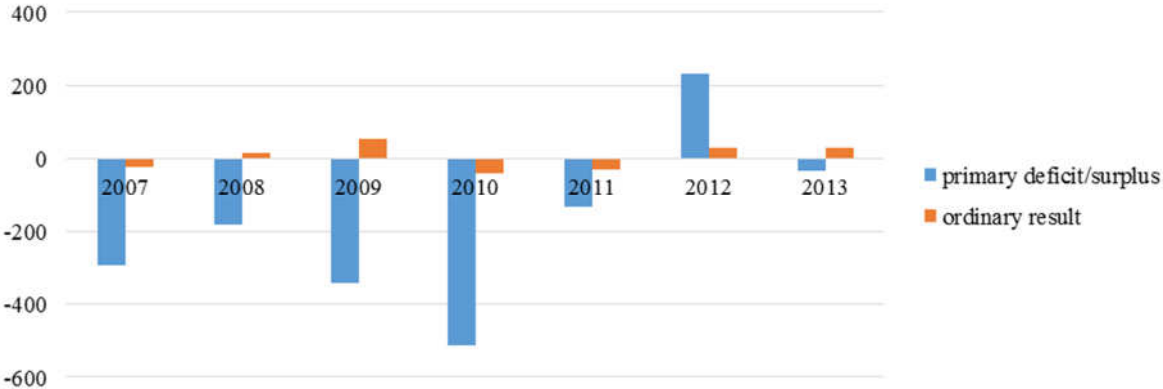
Figure 1: Seating in the council of Oberhausen after the local government elections in 2009 and 2014



Oberhausen’s is a case with the largest fiscal challenges in our sample and generally in Germany. We have to consider that fiscal consolidation is a permanent task in Oberhausen which is not a result of the financial crisis but has become even more pressing since 2008. The city is one of the most heavily debt burdened German cities and has the highest per capita debt. The consolidation concept resulting from the federal state bailout fund is a consolidation program that has several precursors. Furthermore, Oberhausen was one of many cities in North-Rhine-Westphalia under strict supervision including non-approved budgets and provisional budget management for years (“Nothaushaltsrecht”), as was the case with Wuppertal. Therefore, only expenses for legal or contractual obligations were allowed and investment borrowing including the participation in co-payment requiring economic development programs was restricted. It therefore comes as no surprise that the data analysis reveals a problem definition consisting of continuous attempts to consolidate municipal finances and the difficult social structure of the city. Moreover, quality of life, the demographic challenge and planning related to the downtown area are dominant issues. To access the fiscal situation properly, we compared the key data with the other German cases but also with other independent cities in North Rhine-Westphalia (up to 500,000 inhabitants). Oberhausen has the highest local government debt (total and short-term) among the German cases in our sample and has the highest debt compared to the average among independent cities in the federal state (Figure 3). Before implementation of the bailout fund, the collection rates for local government taxes, such as business tax and real property tax, were the highest in the sample and are well above the average for the federal state (Figure 4). However, some

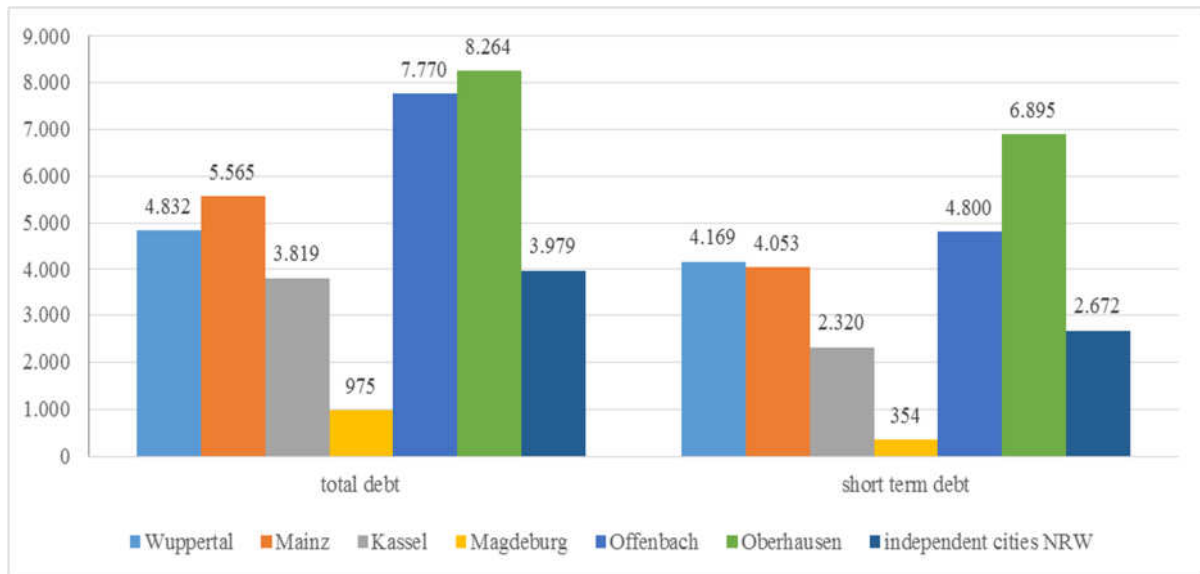
cities in the Ruhr area and other neighboring regions with similar fiscal problems (Gelsenkirchen, Bochum, Solingen and Wuppertal) exceeded these tax collection rates. With regard to revenues, Oberhausen is an average municipality but one must consider that North Rhine-Westphalia is the federal state with the highest decentralization of tasks. Nevertheless, the comparison within the federal state shows also that city revenues are quite high. The comparison of different kinds of revenues shows that total tax revenue and business tax are also average compared to the other cases and similar to the average in the federal state (Figure 5). Furthermore, there are challenges on the spending side. Spending for staff is comparatively low compared to other independent cities in North Rhine-Westphalia. Indeed, the spending for staff is higher than in the other city case studies, but this could be explainable by the higher amount of local government tasks in North Rhine-Westphalia. Thus, Oberhausen managed to have lower expenses than the average in NRW. By contrast, the level of social spending is higher than in the other cases (except Offenbach) and also higher than in other independent cities in North Rhine-Westphalia, reflecting the socio-economic difficulties of the city (see chapter 2). Another major challenge is the very low investment spending in the year 2012 – only Wuppertal performs worse – that is caused by the restricted scope of action (see above) and suggests that the fiscal policy is unsustainable in the long run (Figure 6).

Figure 2: Primary deficit/surplus and ordinary result in Euro per capita



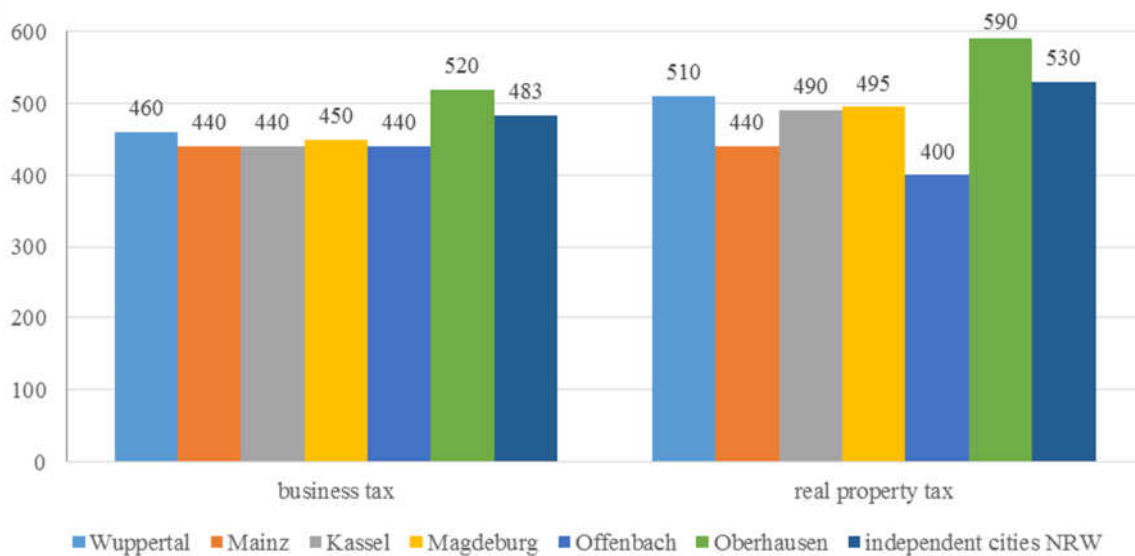
Source: Bertelsmann Stiftung 2013

Figure 3: A comparison of total and short-term debt in local government in Oberhausen in comparison in euro per capita in 2012



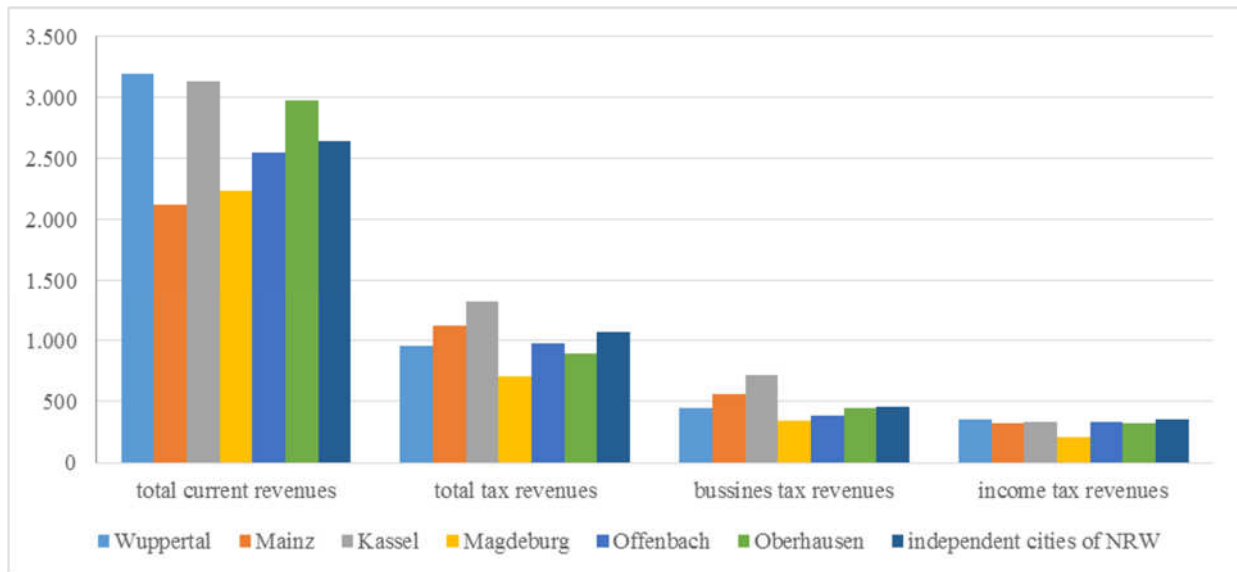
*average of independent cities in North Rhine-Westphalia with up to 500,000 inhabitants. Source: (Bertelsmann Stiftung 2013)

Figure 4: A comparison of collection rates of local government taxes in Oberhausen in 2012



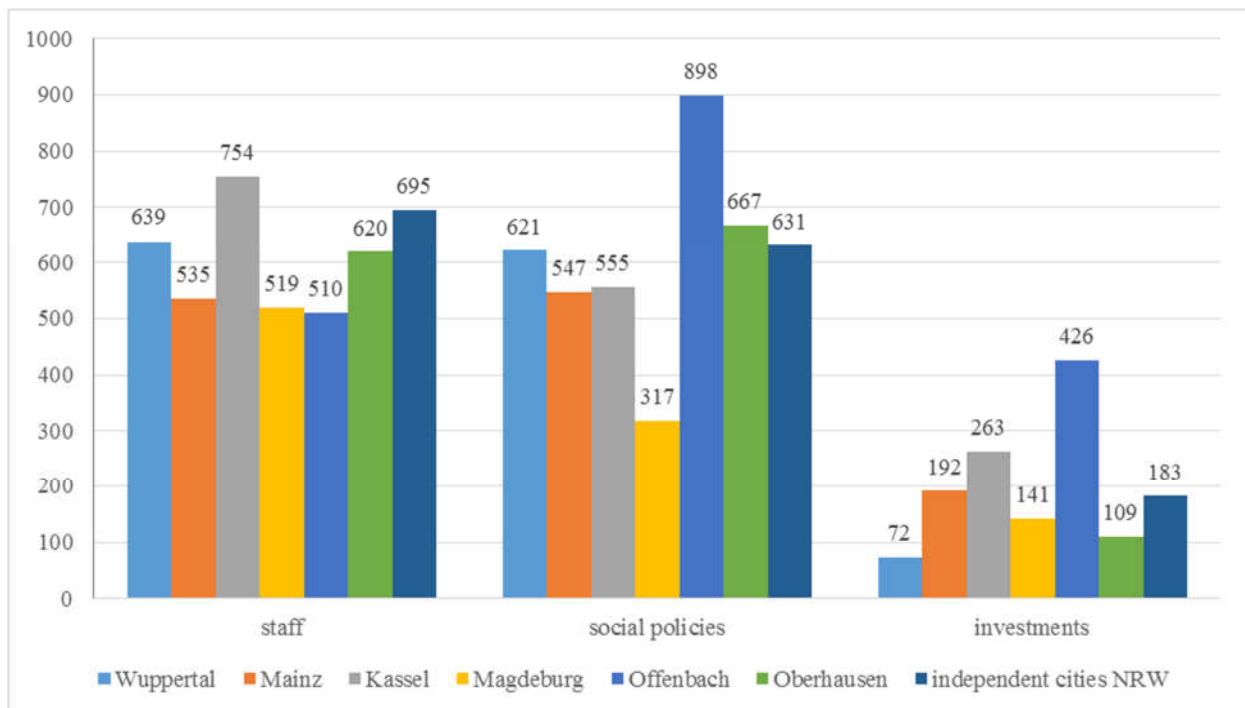
Source: (Bertelsmann Stiftung 2013)

Figure 5: A comparison revenues of local government revenues in Wuppertal in euro per capita in 2012



*average of independent cities in North-Rhine-Westphalia with up to 500,000 inhabitants. Source: Bertelsmann Stiftung 2013

Figure 6: A comparison of local government spending in Oberhausen in euro per capita in 2012



*average of independent cities in North Rhine-Westphalia with up to 500,000 inhabitants. Source: (Bertelsmann Stiftung 2013)

4. Problem Perceptions and Causes

Table 2 and 3 shows how often different actors speak about exogenous and endogenous causes for the fiscal crisis. Documents that can be assigned to one specific actor (budget speeches, press releases, manifestos, coalition treaties) are listed in table 2 **Σφάλμα! Το αρχείο προέλευσης της αναφοράς δεν βρέθηκε..** In documents with several quoted or paraphrased statements by different actors, such as local press articles, segments were coded

with the actor name and the content of the statement. Thus, table 5 displays segments with an actor code that overlaps with the corresponding content codes, endogenous reasons or exogenous reasons.

Table 2 shows the exact coding of reasons of the fiscal reasons with different subcodes. Deductive codes are highlighted in yellow and inductive codes in green. We found some endogenous causes that could be labelled with a more specific term but this set of reasons is discussed on a generally quite abstract level. Table 5 is part of the exogenous causes and deals with economic restructuring. Because the economic restructuring is of major importance for this case, we show the citation in an extra table.

Table 2: Different types of endogenous and exogenous reasons

Code	Subcode 1	Subcode 2	Subcode 3	
Endogenous causes				6
	OGM			28
	Real property tax			9
	Buisnes tax			8
	Administration/personel			10
	Theatre			4
	Mall Centro			2
	STOAG			2
	RWE stock			2
	BFO			1
Exogenous causes				1
	Upper-level government			2
		Cutbacks		2
		Social spending		25
		European level		1
		National/federal level		14
		Solidarity pact		6
		Business tax law		1
		Federal state level		17
			Bail out founds	49
	Socio-economic conditions			3
		Migration		6
		Lack of training positions		1
		Loans		2
		Level of incomes		2
		Unemployment		14
		Financial crisis		2
		Economic restructuring		28

Table 3 shows some quotations on the endogenous causes including the different subcodes of fiscal problems. It is obvious that the opposition in the council underlines the endogenous causes for the fiscal problems.

Table 3: Endogenous causes

Actor	Segment	Document group
I1	If we look at the social sector or youth welfare services, we can see to some extend a self-inflicted problem. There are costs that a municipality like Oberhausen cannot afford. [...] With such an insight in the past, debates were probably shifted in another direction. It was a black box. Furthermore, we have a rate of business tax of 550. By far the highest in North Rhine-Westphalia. [...] It makes no sense for Oberhausen to have high taxes with other wealthier cities far below it. If somebody wants to help Oberhausen then you have to make sure the	Interviews

	trade tax is reduced.	
I2	Twenty-three years ago, there was already an emergency budget. [...] Nevertheless, projects were implemented and debts increased. [...] We have asked for so many advisory opinions, like BBDO, Ernst and Young. How to change structures, merge corporations, how to boost the economy in a new direction. My stance is the truth lies in between the different opinions. I do not want to say that Oberhausen has done this or that right or better than Essen. Looking at the structure of the innovation index for major Ruhr city centres, it is hard to compare the different locations statistically.	Interviews
D1	A high trade tax also jeopardizes jobs.	Council minutes
D2	The incredibly steep rise in real property tax appears to be scaring away all the people who want to live in Oberhausen on their own money.	Council minutes
D3	This city has constantly lived beyond its means.	Parties and lists
D4	The treasurer, Mr. Tsalastras, proposed a massive increase in property and real property tax for 2012 which poses the danger of Oberhausen becoming unattractive for companies and families. "Or should we soon start to refer to ourselves as retirement home Oberhausen?" said Heiden.	Press and media
D5	In addition, the municipal company OGM implemented only 50 percent of the 2008 austerity package.	Press and media

Table 5 shows some quotations on the exogenous causes including the different subcodes for fiscal problems.

Table 4: Exogenous causes

Actor	Segment	Document group
I3	We still have huge industrial sites that we cannot use for small business or medium-sized enterprises at all, because either they do not belong to us or we cannot afford to make them usable. We should have demanded from the industrial firms to clean up any contamination. However, this never really happened. They raked in the profit and remediation was the municipality's or federal state's duty.	Interviews
D6	With the business tax reform of 2001 the vanity started. [...] Over the years, the federal government <i>Land</i> showed no solidarity towards the municipalities. The national government and the <i>Land</i> have transferred duties to the cities without giving more money. [...] Over the years, we were excluded from assistance measures, because we were not allowed to fund our stake, not even with financial aid from others. At the same time, some measures were introduced especially to give assistance to cities such as Oberhausen with a big deficit when it comes to economics or the social sector.	Council minutes
D7	Given the huge financial plight of the Ruhr area cities, major Klaus Wehling (Social Democratic Party) called for a concerted action to help cities with high social costs.	Press and media
D8	Indeed the national government promises Oberhausen annual financial subsidies of about €50 million, but the rest of the annual deficit of €160 million is to be saved by the city itself. The subsidies acceptance will be legally compulsory. [...] André auf der Heiden: "This is a poison pill from the <i>Land</i> . Our city will be economized to death. It is about all of Oberhausen's infrastructure."	Press and media
D9	We have to agree, "that structural aid is not only sent to the east because of the geographical direction but in accordance with needs," Wolfgang Große Brömer stresses. In this regard, the Ruhr region has top priority.	Press and media
D10	"The savings target is demanding, but we have no choice. Otherwise the hatchet man (<i>Sparkommissar</i>) is coming," says the head of the Free Democratic Party parliamentary group, Hans-Otto Runkler. "However we try to soften the actual economic consequences locally. If in the coming ten years the state assumes more social costs, then we don't have to save that much or we can reduce the increase in	Press and media

	taxes.”	
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Despite the socioeconomic restructuring which falls under the exogenous causes, this category of arguments will be presented separately because they represent a separate and intense discussion in Oberhausen – as was the case in Offenbach – that refers to specific challenge of economic restructuring. The transformation of the former mining city is half-hearted. For example, the Centro is partly a success story of the transformation from an industrial area into a center for the service and retail shopping industry. It is a bold planning effort, but has its shortcomings (Mader 2016).

Table 5: Exogenous causes: the socio-economic conditions

Actor	Segment	Document Group
I4	The social situation is the major cause for the inability to get the structural changes right in Oberhausen and the whole region and to create an economic basis for coming to grips with the social situation, regaining control, and exercising governance. This has not been achieved in a fully satisfactory way. [...] Now the costs for refugees are looming, which is again creating a huge challenge because these costs are something which could not be mapped out in advance. Furthermore, the additional costs are in the double digit millions.	Interviews
I5	Although it is the negative figurehead, Oberhausen exemplifies the Ruhr region's problems.	Interviews
I3	Altogether, we lost around 40,000 to 50,000 jobs as a result of the structural changes.	Interviews
I1	Just pleading that the structural changes caused this situation does not hold water. Moreover, if you rely on this, additional problems will emerge that will in turn be blamed on the structural changes. You are then in the situation Oberhausen finds itself in.	Interviews
D11	The gap between rich and poor cities is widening.	Council Minutes
D12	Compared with other cities you have to note that the structural low income is not just an Oberhausen phenomenon, but is a characteristic of all cities experiencing structural changes.	Council Minutes
D14	Oberhausen is a poor city, not only because of its huge budget deficit. In addition, at €16,640 the disposable income of the citizens is quite low.	Press and media
D15	The largest single item of expenditure is the social costs. This is because Oberhausen has an unemployment rate of 11.5 percent, another negative record. “Even compared with other municipalities in a difficult budgetary position this is high,” says Tsalastras. “This is even more telling because the current economic upturn is not reducing unemployment”	Press and Media

5. Scope and means of Actions: Evaluation, performance, impact

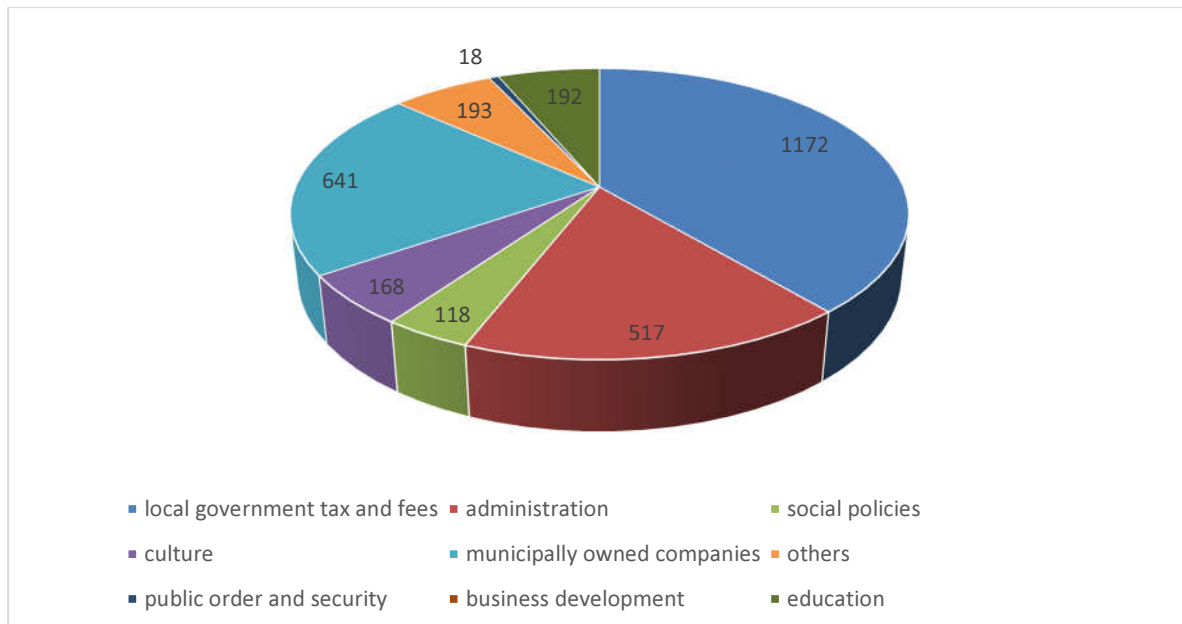
The following statements (Table 6) illustrate the perception of the change in the local scope of action attributable to the bailout fund. In the view of the Lord Mayor, the administration and the council majority the bailout fund underlines the necessity of consolidation measures, whereas special interest group strongly disagree with this view. The public debate is split into two different positions: on the one hand the bailout funds as necessary and a recognition of the specific challenges of the municipalities, and on the other austerity as "torture" (see Keim 2016).

Table 6: scope of action – selected quotations

Actor	Segment	Document group
I4	If one takes into account in how many areas we put things forward, we submitted a budget consolidation plan (2/2012) with 200 specific measures. In doing this we covered all societal fields, either through the departments submitting proposals or with our central working groups supporting the plan. However, the latter were not positively received by the administration or the public either. Such a bailout fund again helps to ensure the approvability of a budget in this region. It has been done like this five times already.	Interviews
D6	This bailout program for the city’s finances includes three important points. 1. A true capacity building. 2. A combination of promotion and demand and 3. A foreseeable end to the feeling of futility.	Council Minutes
D17	It is the principle “no saving to death”	Press and media

Figure 7 outlines the consolidation measures of the local government structured by different policies in our research period. These 209 measures are stated in the consolidation plan that is required to be eligible for federal funding, and this plan is approved by the supervisory body. The data show a high proportion of revenue-based consolidation measures and cutbacks in the administration. The municipally owned companies are the third largest element and are a specific feature of Oberhausen, as the municipality outsourced parts of administrative services. The municipality has some remarkable cutbacks and intended efficiency gains in social and cultural policy and education. Overall, the amount of consolidation funding is low compared with other cases, and reflects the long history of cutbacks (355 Euro per capita).

Figure 7: Consolidation measures implemented in Euro per capita 2012-2021



Source: Stadt Oberhausen 2012

Most actors referred to this general mixture of measures in explaining their point of view such as in the case of sports clubs (Table 7). The administration and its leadership, but also the major opposition party, support the opinion that raising taxes is inevitable and unavoidable.

Table 8 gives a brief overview of the means discussed which we identified in our MAXQDA-Analysis. The raised taxes and the cutbacks are at the centre of attention of the measures. In particular, administration personnel are the issue most intensely discussed. Moreover, there is general "grumbling" about higher taxes, but without questioning their necessity.

Table 7: Means implemented – general statements

Actor	Segment	Document Group
I3	We have issued a program for reducing the number of sports fields by forcing the clubs to change their locations for matches and to join with other clubs, with the incentive that existing sports fields will be renovated and restructured. A large sports field has been marketed quite well. We could convert them into plots and ideally this would be a measure through which we could obtain some revenue. However, this has required a great deal of effort to persuade the clubs. At the end of the day, it was a very successful project.	Interviews
I4	The tax increases was not desirable. In the end they were accepted by some parts of the council in order to create the bail out fund. However, tax increases are still undesirable as they always have been and will continue to be, because you suffer in attractiveness.	Interviews

Table 8: Measures mentioned in the documents – codes and number of codes

management reforms		4
	Sport grounds	1
	Employment promotion	2
	day off	2
	Public transport	7
	Energy saving measures	3
	"Intelligent savings"	4
revenues increase		14
	Raising taxes for trade fair	1
	Parking fees	1
	Culture tax	4
	Real property tax	8
	Amusement tax	3
	Business tax	8
Cutbacks		6
	Zoo	2
	Libraries	7
	Budget freeze	1
	Theatre	5
	Public swimming pools	10
	Schools	4
	Municipal companies	4
	Public buildings	1
	Personnel	17
	Social policy	6

As the pure number of codings in the press analysis does not necessarily reflect the whole local debate we also included the subjective perception of the actors of the controversial measures mentioned above, such as cutbacks in personnel.

Table 9: Controversial measures in the local debate

Actor	Segment	Document
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		Group
D18	“We will not close down schools, because we want to save money. They just had too few pupils [...],” says Wolfgang Große Brömer, head of the Social democratic faction in the council [...]. “There is not much potential for savings” said the head of the school.	Press and media
D19	The trade union (GEW) is worried about the measures. „It is a list of cruel acts against the youth of Oberhausen,” said Comelia Schiemanowski from the GEW. Even now prospects for the younger generation are poor. “Overcoming these unfair conditions should be the focus of local politics.”	Press and media
D20	Even the municipal personnel were affected by the cutbacks. Employees had to take their days off. The harsh cutbacks were visible everywhere.	Press and media

The perceptions of the fiscal consolidation are shown in Table 10. Surprisingly, the views on the success of the effort are closely balanced and the negative opinions are not the majority. Even criticisms are balanced and formulated against the background of the difficult economic, social and fiscal situation.

Table 10: perceptions of performance

Actor	Segment	Document Group
I5	From this perspective, you can judge this measure as being successful for Oberhausen. [...] We had many years without any of this, so I think the implementation was fruitful. [...] If the bailout fund had not been issued, we would not have had a chance.	Interviews

6. Public debate

In this chapter we will illustrate our interpretation of the public debate, e.g. the dominating actors and some visible cleavages. Table 11 shows the most relevant actors in terms of the number of press articles quoting or paraphrasing statements made by them. The data suggest that the treasurer followed by the Lord Mayor and the heads of the council faction are the most important actors in the local debate. Furthermore, the group of experts is small in number as in the other cities in the sample. In contrast to most other cases, interest groups are visible in the local debate on fiscal policies especially trade unions and the worker council. This corresponds with the nationwide attention in the media, as Oberhausen is the German Detroit (Handelsblatt, 20. August 2013).

Our empirical findings described in chapter 4 and in chapter 5 suggest that the different actor types have no distinct problem perceptions and explanations. The challenge of economic restructuring is viewed and shared among different actor groups and is a common narrative. Higher taxes and the administration's personnel are strongly discussed but both with the feeling of "this is not desirable but necessary". Another interesting feature is references to reports by experts such as Ernst & Young. Independent of party origin, such references seem to be necessary to underline own argumentation.

Overall, the public debate is oriented towards the council and the town hall and the actors representing the municipality. They try to achieve consensus and to navigate Oberhausen out of misery. However, a remarkable and noisy opposition is visible complaining about the general trend and less about concrete measures. The measures discussed are comparable to the other German cases like tax raises and so on. Oberhausen is less optimistic than Wuppertal

where the narrative of a successful turnaround is gaining ground. Nonetheless, Oberhausen has some remarkable success stories like the balanced budget for next year. This target seemed to be beyond imagination a few years ago.

Table 11: Actors with the most press articles quoting or paraphrasing their statements⁶

Actor	Codings	Codings in %	Documents	Actor Group	Position	Opposition /Majority	Party
Apostolos Tsalastras	42	19.72	35	Administration	Treasurer	Majority	Social Democratic
Wolfgang Große Brömer	37	17.37	35	Local politicians	Councillor, Head of the faction	Majority	Social Democratic
Klaus Wehling	29	13.62	28	Local politicians	Former mayor Lord	Majority	Social Democratic
Daniel Schranz	27	12.68	22	Local politicians	Lord Major	Opposition	Christian Democratic
André auf der Heide	14	6,57	13	Administration	Head of work council		
Hans-Otto Runkler	11	5.16	11	Local politicians	Councillor, Head of faction	Majority	Free Democratic
Trade Unions	9	4.23	9	Societal actors			
Bernhard Elsemann	7	3.29	5	administration	Former treasurer	Majority	Social Democratic
Regina Wittmann	7	3.29	7	Local politicians	Councillor, Head of faction	Majority	Green Party
Hartmut Schmidt	5	2.35	5	Societal actors	CEO OMG Oberhausen		
Others	25	11.8	25				

7. Political system: Legitimacy and transparency, political culture, policy style, knowledge, leadership

The prevailing policy style is top down and based on the special knowledge possessed by the administration, but relevant veto players are included as the main parties are part of the coalition or the Lord mayor's party. Fiscal policies were discussed in closed circles within the administration. Special interest groups or backbenchers were not included in the phase of agenda formulation or priority setting. Nevertheless, the parliamentary process worked with relatively little noticeable controversy and the council majority "executed" the consolidation plan, although the major discussion took place within the city council (and not via the media). However, the top-down policy style prevails, whereas the political and administrative leadership is aware of the importance of communication with the population, but the inter-

⁶ The grey lines are the people interviewed.

administrative opposition is quite remarkable. The Christian Democratic Union as the biggest opposition party is the most active in formulating criticisms of the fiscal plans.

The policy style described results in a focus on output legitimacy. Councillors are only involved when there is a political or legal need. Participation/input legitimacy is used within the administrative structure (working group on that issue that prepare the measures) and by participatory budgeting. This participation is compared to other cases remarkable. Besides this feature, the political culture is characterized by party discipline and majority-based decision making within the council but with cooperation in devolving the measures. This party politics is partly opposed by a consensual political culture. Oberhausen is still a social democratic stronghold and has a conservative Lord Mayor “by accident”. The years of one-party dominance produced a preference for consensual decision making. Although the administrative leadership highlights the financial scope of action, they also define implicit or explicit priorities as guidelines for consolidation policies. Policies are declared important or less important, and funding is allocated on the basis of these priorities, often with argumentative support from expert’s reports. In terms of leadership styles, we would therefore characterize the leadership as strategic and partly authoritarian.

Table 12: Political culture and leadership – selected quotation

Actor	Segment	Document Group
I1	Oberhausen has to set itself targets. However, you cannot expect to argue away two billion.	Interviews
I4	Just through the consolidation targets we again have the ability to develop strategic targets and to aim for them. This means we can now participate again in the assistance program. [...] It is difficult to change the framework conditions but has had the chance of enhancing some aspects of the framework conditions. We are again obtaining a perspective on what it is possible to carry out.	Interviews
I2	The current mayor is economically oriented; first, he has visited all firms. Thus, he has a different emphasis compared with his predecessor.	Interviews
D1	With the unbroken hope for reason and good will, the Free Democratic Party caucus will consent to the 2013 budget and restructuring plan.	Council Minutes
D21	It will be no surprise that the Christian Democratic Union caucus will oppose the 2013 budget as we did in 2012. In addition, the budget consolidation plan 2013 and following years cannot obtain our approval.	Parties and Lists
D17	Christian Democratic Union parliamentary leader Daniel Schranz [and current Lord Mayor, G.T.] harshly attacked the Social Democratic Party in his budgetary speech. He blamed the reigning party for their “arrogance and loss of the sense of reality.” Pointing to other cities with comparable problems “Oberhausen still is the very last in the whole country, and responsible for this is the Oberhausen Social Democratic Party alone.” For this reason the Christian Democratic Union cannot consent to the budget.”	Press and Media

8. New actions

Metropolitan and urban areas were always seen as a nucleus of innovative practices referring either to economic growth or social integration (e.g. Komninos 2002). By readjusting their fiscal situation cities are trying to find new ways of addressing specific problems such as the ones mentioned above, and the data and discourses advise all actors that fiscal consolidation is not enough but has to be complemented by policy innovation focused on economic development (ibidem) as well as social cohesion by local initiatives (Bakker et al 2012). To achieve this kind of policy innovation the formation of new local initiatives aimed at mobilising endogenous locally embedded potentials in these two fields seems to be crucial.

The German cities addressed social cohesion a long time ago, and it has been highly institutionalized since the 1970s (Blanke et al. 1987: 421). It seems that this constellation has been slightly challenging in recent years. Nevertheless, the general impression is that municipalities are following this path in dealing with social cohesion. This is in particular the case in the field of local economic development, a well-developed policy field. Municipal economic agencies are working in an institutionalized and professional way with close ties to local companies and local business networks in order to apply municipal strategies for local economic development (Haus et al. 2005: 132ff. and 210 ff.). Insofar, and in contrast to the Greek cases, these two fields are well developed and innovations are moderate.

a. Social cohesion (and social policy): New actions, innovation

“Oberhausen is the only city where Christo conducted an event twice” (Wehling, budget speech 2012). This remarkable fact is misleading for two reasons: first, Oberhausen is a well-known place for exhibitions such as the Gasometer. Second, Oberhausen is not a central place for global cultural events. Nevertheless, Oberhausen is the home of several cultural initiatives that are new and innovative initiatives replacing or, better, flanking the traditional social policies which are well established in Oberhausen. It is more a hipster scene of urban artists well connected all over the Ruhr area (see for example <http://www.urbanekuensteruhr.de/>). Although the cultural activities are innovative, the actions in the field of social cohesion are traditional. Regarding new initiatives dealing with social cohesion, Oberhausen is not a front runner. The traditional scene of worker unions is still dominant and active in the city. Another feature is the “Soziale Stadt” projects, an initiative founded by the federal government which supports neighbourhood activities. It is a mixture of infrastructure measures and citizen involvement. In Oberhausen several of these projects are taking place in the city centre and Knappenviertel, while there are newly developed plans for linking the city center to Lirich (a nearby neighbourhood). These initiatives are municipal driven.

Overall, Oberhausen is a traditional Social Democratic stronghold and blue-collar city with highly institutionalized structures of social cohesion. The cultural activities are new and innovative features within the network in the wider region, and even attract international artists.

b. Economic development: New actions, innovation

Economic development is of central importance for the city of Oberhausen, a city founded to develop a healthy setting for industry. Economic restructuring destroyed the old industrial basis of the city, although the actively productive branches of industry are still remarkable. In the 1990s a shift to service delivery and consumption took place. The Centro became the symbol of these new policies and the attempt to modernize the city. This change has been partly successful, but cannot compensate for the loss of thousands of jobs in industry. Moreover, the new jobs are attracting an unskilled workforce and increasing the fiscal challenges faced by the municipality.

Another remarkable change has occurred in recent years, especially with the election of the new Lord Mayor. In order to stimulate new initiatives, he merged the economic development municipal company and the municipal tourist company (OWT: Oberhausener Wirtschafts- und Tourismusförderung GmbH). The idea is twofold: first, it is a symbolic upgrading of the two companies, especially as Oberhausen is not considered to be a first class tourist destination. Second and more important, the merger was carried out in order to develop municipal areas and bring them to the market. As in the founding year, land use is the key to developing Oberhausen. These structural changes within the municipality create new hopes and perspectives in developing Oberhausen, across the party affiliation. In line with the historical development of the city focusing on infrastructure, Oberhausen invests in the development new digital infrastructure like the broadband rollout.

The following citations should illustrate the analysis:

Table 13: economic innovation

Actor	Segment	Document Group
I1	I think that the foundation of this municipal company is innovative. From my perspective, the OWT is an innovation as such [...] Because the Lord major has made the economy his personal domain/Chefsache. If you look at this, I think this is the new approach to tackling problems with the chance of changing things that formerly got stuck and of giving them new momentum.	Interview
I4	[...] But rather to think in value added chains, to look at what is given emphasis and to link firms which fit into this value added chain to Oberhausen to highlight this to boost attractivity. [...] These are all things that others are also doing, we didn't invent them. Innovation is just an approach for gaining from new potentials and leaving old structures behind. At this point it's really important to come out targeted at these structural issues. What we have done is to reset the promotion of the economy. For us it's innovative because in the past it was not practiced. I think it is really important to provide specific services to firms and to be exceptionally striking when it comes to economic promotion if you can't change the location factors positively.	Interview

9. Conclusions

Oberhausen is trapped in a “feeling of futility” (in German: *Vergeblichkeitsfalle*) like Wuppertal and many other cities in the Ruhr area. Nevertheless, Oberhausen is a municipality with one of the highest levels of debt in Germany and the object of many reports in the national mass media. Exceptionally seriously affected by the economic restructuring, Oberhausen is a shrinking city with just a few glimmers of hope like the Centro. It is a great success that the treasurer is targeting a balanced budget for 2017, the first balanced budget in the past 25 years (Schlüter 2016). This is indeed an impressive outcome after 20 years of fiscal efforts. This success can be explained partly by the bailout funds and the long experience of the administration in finding new source for cutbacks and efficiency gains. The new political constellation – the Lord Mayor from the Christian Democratic Union and a council majority consisting of the Social democratic Party, Greens and Free Democratic Party – is challenging, and the actors partly condemn it. Thus, this constellation leads to discipline on fiscal issues and is one aspect leading to balanced budgets. Excuses are not an option for the political actors. On the other hand, all actors have to rethink their position. For example, the Lord Mayor cannot quite deliver on what he promised before the election, such as tax cuts.

Thus, there is a visible resistance to bailout measures especially by the organized employees. They are breaking the cycle of inter-council and town hall discussions and shifting the discussion into the public domain shifting the discourse about the city (Tsalastras/Scholz: 2015).

Although there are signs of success, Oberhausen is a challenged municipality. The carrot and stick tactic of the bailout program (take the money for measures or accept a "Sparkommissar") is arousing opposition and leading to more blame being directed at the actors formerly in charge. It is introducing tensions into the local debate although almost all actors agree on the necessity of measures (worker unions and the Left party are strictly against it). Nevertheless, most of the local actors explain the fiscal problem as resulting from exogenous factors and especially economic restructuring. The concrete means are mostly revenue-based which can be explained by longstanding austerity policies making more cutbacks impossible. The administration is affected, too. As mentioned before, there is a no visible local debate about the performance of consolidation measures, which include discussions on concrete impacts of older and newer consolidation means and restrictions of the local scope of action. Most actors are opting for resistance to the measures. Overall, fiscal policies are characterized by strategic and authoritarian leadership of steering politicians and administration who focus on output-legitimacy and have access to exclusive knowledge. The case of Oberhausen shows that the bailout fund was able to introduce some significant incentives. Despite the fiscal relevance of the program, staying on track in achieving fiscal consolidation seemed to have an important psychological impact on the administrative leadership and the council majority.

Despite these positive signs, Oberhausen is still in a difficult situation. This is obvious when considering the new approaches being taken. For example, the low volume of investments by the municipality shows that new approaches are rare. Thus, new initiatives in the area of social cohesion are in traditional form, which is remarkable for a challenged city like Oberhausen (in comparison to the Greek case studies). Economic development is partly innovative as the new Lord Mayor set this priority in this field. Whether this change will be sustained is questionable. The basic structural problems seem to be too great. The need for extra assistance is obvious, and all actors are arguing in this direction. Or to put it in other words: Oberhausen must bleed so that Jena can blossom ("Damit Jena blühen kann, muss Oberhausen bluten," *Die Zeit*, March 8, 2012).

10. Policy recommendations

Recommendations for local level actors (micro level)

Input legitimacy: Leaders in fiscal policies must be actively engaged in and enforce public debates to gain acceptance for consolidation measures.

Throughput legitimacy: Talk about the process of decision taking. The complex involvement of different actors should be acknowledged in a brought local discourse.

Output legitimacy: Consolidation policies and the mixture of revenue and spending-based consolidation measures must reflect the specific challenges and history of consolidation of the cities and their administrations.

Policy style/
leadership: Policy makers should make strategic choices in consolidation policy. They must define which policy fields are important and which are of secondary importance.

Political culture: Consensus orientation should not cover dissent opinions. Different perspectives could be helpful to check certain patterns.

Use the innovative potential of cultural activities. They might cultivate a specific dynamic of new fields of development – besides the service sector.

Recommendations for federal and state-level actors (macro level)

Upper level governments should use the instrument of conditional bailout funds to strengthen local government incentives to consolidate their budgets.

Strengthening the local scope of action in consolidation is necessary to attenuate negative impacts of consolidation policies.

Hierarchical steering must be limited to long-term measurable goals without detailed restrictions on contents and priorities of consolidation policies.

Upper level governments must promote economic development policies, administrative reforms, preventive social policies and human resources to combat the causes and not just the symptoms of fiscal crisis.

Structural changes cannot be achieved through short-term programs. Challenged cities such as Oberhausen need a long-term perspective in order to reform local finances.

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List of interviews

	Actor	Function	Party
I1	Simone-Tatjana Stehr and Frank Lamers	Head of caucus; general secretary of the parliamentary group	Christian Democratic Union
I2	Frank Lichtenheld	CEO of the municipal business development agency Oberhausen	
I3	Wolfgang Große-Brömer	Head of caucus, council City of Oberhausen	Social democratic Party
I4	Apostolos Tsalastras and Jürgen Schmidt	Treasurer of the City of Oberhausen, head of the department for administrative leadership	
I5	Andrea Stöhr	Director of the department of finance, City of Oberhausen	
I6	Desbina Kallinikidou	City of Oberhausen, Office for intercultural affairs	

List of Documents

	Actor	Group of Documents
D1	Hans-Otto Runkler, FDP head of caucus budget speech 2013	Council minutes
D2	Hans-Otto Runkler, FDP head of caucus budget speech 2012	Council minutes

D3	CDU head of caucus speech state of Oberhausen. In: CDU KLARTEXT 2011 (7) p.8	Parties and lists
D4	Peter Szymaniak: Rathaus Personal hält Sparpaket für viel zu groß. In: Neue Rhur Zeitung. November 11. 2011	Press and media
D5	Peter Szymaniak: Rat will den Spareifer der Verwaltung kontrollieren. In: Westdeutsche Allgemeine Zeitung. June 9. 2012	Press and media
D6	Klaus Wehling, lord mayor budget speech. December 12. 2011	Council minutes
D7	Peter Szymaniak and Andrea Rickers: OB Wehling fordert Hilfen von Bund und Land. In: Westdeutsche Allgemeine Zeitung. January 26. 2011	Press and media
D8	Peter Szymaniak: Man will unsere Stadt tot sparen. In: Westdeutsche Allgemeine Zeitung. September 14. 2011	Press and media
D9	Peter Szymaniak: Stabilität ist eine Chance. In: Westdeutsche Allgemeine Zeitung. February 25. 2012	Press and media
D10	Peter Szymaniak: Stadt wird doch nicht zur Wüste. In: Neue Rhur Zeitung. June 22. 2012	Press and media
D11	Apostolos Tsalastras, Treasurer of the City, speech on the budget proposal 2014: Perspektiven auf dem Weg der Konsolidierung. July 15. 2013. p. 6	Council minutes
D12	Apostolos Tsalastras, Treasurer of the City, speech on the budget proposal 2014: Oberhausen vor besonderen Herausforderungen. 12.12.2011. p. 5	Council minutes
D13	Regina Boos, FDP general secretary budget speech. Mai 23. 2011	Council minutes
D14	Westdeutsche Allgemeine Zeitung: Bürger haben wenig Geld zum Ausgeben. August 30. 2011	Press and media
D15	Peter Szymaniak: Kaum Steuerkraft, hohe Sozillast. In: Westdeutsche Allgemeine Zeitung. December 14. 2011	Press and media
D16	Peter Szymaniak: Neue Kredite für Pleitestädte. In: Westdeutsche Allgemeine Zeitung. June 14. 2012	Press and media
D17	Andrea Rickers: Rat verabschiedet Haushalt für 2011. In: Westdeutsche Allgemeine Zeitung. Mai. 24. 2011	Press and media
D18	Neue Rhur Zeitung: SPD hält an Plänen für Schulschließung fest. May 28. 2011	Press and media
D19	Neue Rhur Zeitung: Nicht an Bildung sparen. May 19. 2012 (2)	Press and media
D20	Neue Rhur Zeitung: Kürzungen sind schon jetzt unzumutbar. September 16. 2013.	Press and media
D21	Werner Nakot, CDU councilor speech on the budget for 2013. In: KLARTEXT 2013 (4) p.8	Parties and lists