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## Book Part

## Introduction

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## **Introduction**

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Alves, Sónia; Andersen, Hans Thor; Keunen, Els; Vuksanović-Macura, Zlata (Eds.) (2026): Social Housing Opportunities and Challenges – Perspectives from Denmark, Germany, Portugal and Serbia. Hanover, 2-7. = Arbeitsberichte der ARL 40.

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## INTRODUCTION

Housing is a crucial part of citizens' lives. The home is more than a physical setting for daily life, and in many ways materializes people's ontological security. The availability of appropriate housing at an affordable price is therefore of major importance if citizens are to achieve higher standards of living and make the most of opportunities in life. Meanwhile, living in sub-standard housing and/or in difficult environments leads to inferior opportunities in life. Thus, housing policies that promote inclusive, affordable and sustainable housing are critical to contribute to a more resilient society, promoting equality and shared prosperity

In the last few decades, however, national housing systems have been challenged in a number of ways: by increasing social inequalities; by changing demographic trends; by changes in lifestyle preferences; and by the retrenchment of welfare policy and the direct provision of public housing. Furthermore – and despite significant local and regional differences – in recent years, many European cities have experienced significant housing crises due to rising prices on the real estate market.

Against this backdrop, the DASH project, conducted by a consortium of 12 beneficiaries and two associated partner organizations from four European countries: Denmark, Germany, Portugal, and Serbia, has defined three primary goals. First, to develop a better understanding of local culture and traditions in housing provision (in administrative, institutional, and financial terms). Second, to produce knowledge about the specific housing regimes of each national and 2nd-tier city (legal frameworks, housing tenure structure, prices and affordability, ownership structures, recent developments, etc.) (figure 1). Third, to promote a discussion within the DASH's network on the transfer of practices across different places, through thematic learning hubs and individual secondments, to generate new ideas about how to promote more sustainable and safer housing.

The main achievements of the project so far have been the integration of knowledge from various disciplines (geography, architecture, sociology, engineering, urban planning, etc.), and between the academic and non-academic sectors (namely researchers, housing authorities, housing associations, private stakeholders, etc.) across four European countries.

This book, entitled *Social Housing Opportunities and Challenges: Perspectives from Denmark, Germany, Portugal and Serbia* is a compilation of the analyses of housing markets in each of the four countries, at both national and local levels. It brings together four country reports, and each follows the same structure, composed of four components, in which the same set of questions is answered:

- > Component 1. Social housing: What are the goals of social housing? What proportion of the total housing stock is social housing? Who can get access to

social housing, and by which procedures and criteria? What is the socio-economic composition of the population living in social housing? Who owns the social housing stock? Who pays for the construction and maintenance of social housing?

- > Component 2. Affordability: How is “affordability” defined in conceptual and operational terms in the country’s social housing system? What mechanisms guarantee that social housing is affordable for households?
- > Component 3. Policy trajectory: What have been the main developments in the recent past (30 years)? What are the current main challenges and developments in the sector? How do you see the future development of the sector?
- > Component 4. Social housing in the selected secondary city: How does the local situation compare with the national characterisation presented above? What have been the main developments in the recent past? What are the current main challenges and developments in the sector, and how do you see the future development of the sector? How do you see the future development of the sector?



Figure 1: The DASH project participating countries and analysed middle-sized cities. Source: DASH

	Denmark		Aalborg	
	1 January 2025	Change since 2011	1 January 2025	Change since 2011
Population (n. °)	5,992,734	7.8%	224,612	12.8%
Households (n. °)	2,857,302	10.6%	115,895	18.5%
Housing stock (n. °)*	2,852,000	10.8%	115,616	18.9%
Housing tenure composition (% of dwellings used as main residence)				
Owner occupancy	47.6%	-7.85%	39.6%	-13.0%
Private rental	21.1%	37.02	27.3%	32.6%
Non-profit or social rental	19.9%	-3.56%	25.4%	0.0%
Other (e.g. cooperatives)	11.4%	2.51%	7.6%	2.5%
Average rent per m <sup>2</sup> (in euros) **	10.7	37.2%	9.33	38.2%

\* Dwellings with registered residents (equivalent to main residence);

\*\*Rent per month, nominal prices, non-profit sector. Sources: Statistikbanken ([www.statistikbanken.dk](http://www.statistikbanken.dk): FOLK1A, FAM55N. Bol 101, BOL201) and Landsbyggefondens Huslejestatistik 2025 pba. Landsbyggefondens Huslejeregister.

Table 1: Housing and Demographic Indicators: Denmark and Aalborg

	Germany		Tübingen	
	2022 census	Change since 2011	2022 census	Change since 2011
Population (n. °)	82,798,794	3.1%	90,499	9.7%
Households (n. °)	40,236,008	1.8%	44,059	18.3%
Housing stock (n. °)	43,106,589	3.4%	45,896	16.9%
Housing tenure composition (% of dwellings used as main residence)				
Owner occupancy	43.6%	-3.0%	31.9%	-17.5%
Private rental	56.4%	2.4%	68.1%	11.1%
Average rent per m <sup>2</sup> (in euros) *	7.28	18.4%	10.3	N.A.
% of social housing as part of total stock	2.5%	-33.1%	3.1%	N.A.

N.A.: not available; \*Average rent exclusive of heating expenses (Kaltmiete). Sources: Statistische Ämter des Bundes und der Länder, 2011; Statistisches Bundesamt, 2024; Statistisches Landesamt Baden-Württemberg, 2011

Table 2: Housing and Demographic Indicators: Germany and Tübingen

	Portugal		Braga	
	2021 census	Change since 2011	2021 census	Change since 2011
Population (n. °)	10,343,066	-2.1%	193,324	6.5%
Households (n. °)	4,149,096	2.6%	72,012	12.5%
Housing stock (n. °)	5,970,677	1.90%	88,623	4.9%
Housing tenure composition (% of dwellings used as main residence)				
Owner occupancy	70.0%	-4.4%	66.8%	-4.5%
Private rental	22.3%	11.9%	26.1%	11.7%
Other	7.7%	12.7%	7.1%	6.6%
Average rent (in euros) *	334.2	42.2%	341.6	56.8%
% of public housing as part of total stock	3.0%	-3.23%	1.2%	-19%

\*Rent per month, nominal prices. Source: INE, Census data, 2011 and 2021.

Table 3: Housing and Demographic Indicators: Portugal and Braga

	Serbia		Čačak	
	2022 census	Change since 2011	2022 census	Change since 2011
Population (n. °)	6,647,003	-7.5%	105,612	-8.4%
Households (n. °)	2,589,344	4.1%	40,081	1.7%
Housing stock (n. °)	3,613,352	11.8%	55,028	6.9%
Housing tenure composition (% of dwellings used as main residence)				
Owner occupancy	87.3%	-0.3%	88.1%	-0.6%
Rental (private and public)	6.4%	-4.7%	5.9%	0.4%
Other	6.3%	8.7%	5.9%	5.7%
Average rent per m2 (in euros)	N.A	N.A	N.A	N.A
% of social housing as part of total stock	0.4%	-39.8%	0.4%	-29.4%

N.A.: not available. Source: SORS, Census data ([https://data.stat.gov.rs/?caller=SDB:2022Census/Population/Households and Families/Dwellings and Buildings](https://data.stat.gov.rs/?caller=SDB:2022Census/Population/HouseholdsandFamilies/DwellingsandBuildings); 2011 Census/Population/Households and Families/Dwellings and Buildings), SORS, 2022; 2023.

Table 4: Housing and Demographic Indicators: Serbia and Čačak

The analyses presented in the reports are based on three premises. First, there is significant variation in housing systems and models of provision across countries, and these have changed over time. Change has occurred across multiple dimensions, including the goals pursued, the instruments employed (e.g. regulation, governance) the outcomes achieved, and impacts on costs and the quality of housing. The selection of these four countries was intended to capture the diversity of housing systems and housing regimes that exist in Europe, allowing for a nuanced understanding of how different social, economic, and political structures and circumstances, as well as of ideologies regarding the role of de-commodification in housing access, have shaped policy approaches, housing systems and outcomes between countries and cities. By choosing countries that are at two ends of a spectrum when it comes to the organizing of housing system (Serbia/Portugal and Denmark/Germany), this publication aims to unravel divergence in approaches to social and/or non-profit housing provision and its relative weight within the housing stock. While the political and financial systems have prioritised owner-occupation in Portugal and Serbia, more diverse tenure systems can be seen in Denmark and Germany, where approaches to housing provision aim to tackle tenure segmentation and housing affordability. An overview of tenure structure and demographic data in each country and analysed cities is shown in Tables 1–4.

Second, not only have housing systems/markets changed substantially over time (in terms of tenure and ownership structures, prices and affordability) but housing policy's target population has also become more differentiated (in terms of age, demographics, sources of funding, key providers, etc.). Government intervention in the selected countries varies not only in terms of volume among the above-mentioned needs (e.g. education, health care, social protection, housing, etc.) but also in terms of the purposes and forms that investment takes and the division of responsibilities between the three pillars of the welfare triangle (government, families, and markets). Portugal and Serbia typically represent highly commodified systems that treat housing as a private asset, mortgage-driven homeownership, and minimal social housing. Denmark represent more de-commodified systems, featuring a more resilient public/social rental sector.

Third, most urban growth will take place in middle-sized cities in the next decade, even though much research and attention has focused on large urban agglomerations. The dynamics of these second-tier cities and their local housing markets are less well known, and the need to provide sustainable and affordable housing in these locations is bound to increase. The selection of the four middle-sized cities of Aalborg, Braga, Tübingen and Čačak is justified on multiple grounds, including their economic and demographic significance at the regional level, and the governance opportunities and challenges related to relevant contextual factors, such as growth trends, housing market pressures, exposure to climate risks or resilient strategies. As for methodology, the research employs a mixed-methods approach, combining qualitative and quantitative techniques to provide a comprehensive analysis of the trajectory of housing policy in each country/city. It uses a wide range of literature, legislation, policy documents, statistical data, focus groups, workshops and fieldwork. The local components of the report have been developed in close cooperation with the project's municipal partners, enabling them to provide data and insights that come directly

from the stakeholders involved. In an iterative approach, draft versions of the report were further refined through discussions, comments and feedback from other DASH project members.

The reports, which were completed between November 2023 and November 2024, are the result of a co-creation process involving all DASH members. Apart from drafting the reports, members contributed by providing data, discussing the reports and giving comments and feedback. Contributing organisations are: Institute of Social Sciences, University of Lisbon; Department of the built environment, Aalborg University; Department of International Urbanism and Design at the University of Stuttgart; Geographical Institute “Jovan Cvijić” of the Serbian Academy of Sciences and Arts; Aalborg Municipality; Himmerland Housing Association; Universitätsstadt Tübingen; INWOLE; Braga Municipality; Cooperativa Integral Minga; Domus Social; Gaiurb; City Housing Agency Čačak; and Serbian Urban Planners Association.

These reports are novel in a number of ways. Firstly, with the aim of creating new knowledge, they offer a comprehensive reflection, supported by empirical evidence, on past and emerging innovative approaches to tackle the housing crisis. They provide information on organizational frameworks, ways of working, rules, service processes and practices, and coordination in a sphere of public intervention that has undergone considerable change over time.

By critically analysing these transformations, legacies, recent developments, and challenges, the reports provide a unique multidisciplinary perspective on the evolution and importance of housing policy and implementation. The approach is also novel in its use of an epistemological approach grounded in co-production. This approach fosters a deeper understanding of the historical development of housing systems in each country and their impact on social groups and territories.

Each following a similar structure, the reports offer a simple, accessible and yet informed and comprehensive account of contemporary reality, of the policies that are needed to address current and future housing needs, and of the challenges as well as the measures needed to counteract them. The housing market analyses are presented for each country in alphabetical order, starting with Denmark, followed by Germany, Portugal and Serbia.