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## Book Part

# The German report

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## **The German Report**

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## THE GERMAN REPORT



*Note: Germany is a federal republic consisting of 16 Länder or federal states. “State” in this context therefore refers to the regional level. For the national level, “federal republic” is used. Tübingen is located in Baden-Württemberg, which is why this state is sometimes referred to specifically.*

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## Abstract

This chapter presents an overview of the social housing system in Germany. Unlike in many other contexts, social housing in Germany is conceived as a temporary, market-correcting policy; therefore, the social housing function is limited in time. While partially provided by the state, it is primarily supplied by the private sector. Due to privatisation efforts since the 1990s, the number of social housing units has decreased significantly. Moreover, although social housing rents must be below market level, they are becoming unaffordable due to general market price increases. In addition to social housing, Germany provides a housing allowance to low-income households to help cover rental costs or mortgage repayments. Tübingen, a growing secondary city in south-west Germany, faces similar housing challenges. However, initiatives such as the ‘Tübingen Model’ and strict regulations requiring developers to provide long-term affordable housing, have increased the social housing stock.

## Keywords

Social housing – privatization – affordability – housing allowance – Tübingen – Germany

## 1 Characterisation of “social housing” in Germany

### 1.1 What are the goals of social housing?

In Germany, social housing subsidies were initially conceived as a programme to ease the dramatic housing shortage after WWII by incentivising private investment into the housing sector. This underlying rationale has not changed to this day. Social housing is still considered as a temporary correction of a failing market that will eventually, through market mechanisms of supply and demand, provide affordable housing for everyone. This is why the development of social housing is set up as a time-restricted public subsidy programme. Unlike other European countries, where social housing stock is usually provided and managed by either the government, government agencies or housing corporations, in Germany, anyone, including public and private developers, cooperatives or individuals can apply for a subsidy or preferential loan to build social housing. Interest-free loans or grants can constitute up to 50% of the investment. As Germany is a federal state, social housing funds are distributed at state level, where each state has established its own framework for subsidy allocation. As a consequence, the amounts of and criteria for accessing funding vary considerably between states. The subsidy programmes encompass both subsidies for the construction of social rental housing and subsidies for owner-occupation.

In the social rental housing programmes, the social housing function is limited in time. This means that in return for receiving subsidised loans, landlords have to rent out their properties at below-market rates and to entitled households during the social housing period only. Before 2001, the social housing function generally lasted only until loans were repaid. Since 2001, this has changed to a predefined duration. In Baden-Württemberg, for example, the length of time that housing is considered social housing will be 10, 15, 25, 30 or 40 years depending on which funding option the landlord selects (Landeswohnraumförderungsgesetz - LWoFG, 2008). After this period, the housing ceases to be considered social housing and the landlord is free to rent to anyone. Moreover, social rents during the social housing period are not guaranteed to be low or affordable. The rent cap that landlords need to observe is only vaguely defined in the federal legislation as “maximum permissible rents below local comparative rents” (§7, WoFG, 2001) and is to be determined further in the subsidy programmes of the states. The percentage below the market rent that landlords must comply with depends on several parameters, such as municipal regulations and the amount of subsidy requested. The social rent usually corresponds to 66% of local comparative (market) rents. With market rents currently rising largely independent from incomes, new-built social housing is becoming increasingly unaffordable for the lowest income groups, especially in larger urban areas (Statistisches Bundesamt, 2023a, 2024a). Since the rents for these units are set in reference to the existing market rent, this leads to the paradoxical situation that social

housing rents are often higher than older housing units that are no longer social housing (Lechevalier Hurard, 2008). This is because rental price increases of older housing units with existing rental contracts are often below the general market rent rise.

The social housing programme targeted at first-time owners is subsidising land acquisition, housing construction and housing acquisition for family households within a defined income range. Income ranges vary according to the differing state subsidy programmes. The maximum income limit for access to this type of funding is generally higher than the income limits to access social rental housing, while households must also have a minimum income to demonstrate bankability. Household wealth is no part of the eligibility assessment. Given the rising construction costs, land prices and interest rates on market loans (Statistisches Bundesamt, 2024b), social housing subsidies targeted at owner-occupiers are increasingly limited to wealthier households due to their available further disposable inherited wealth

## 1.2 What is the proportion of social housing in relation to the total housing stock? What does this measure include?

Due to the time restriction that a dwelling is considered social housing, the stock of social housing is constantly changing. At its height, around 1987, there were more than 4 million social rental dwellings, representing more than 15% of the total housing stock in what was then West Germany (Kofner, 2017). In 2022, this is down to less than 1.1 million units or 2.5% of the housing stock for Germany as a whole (Bundes-

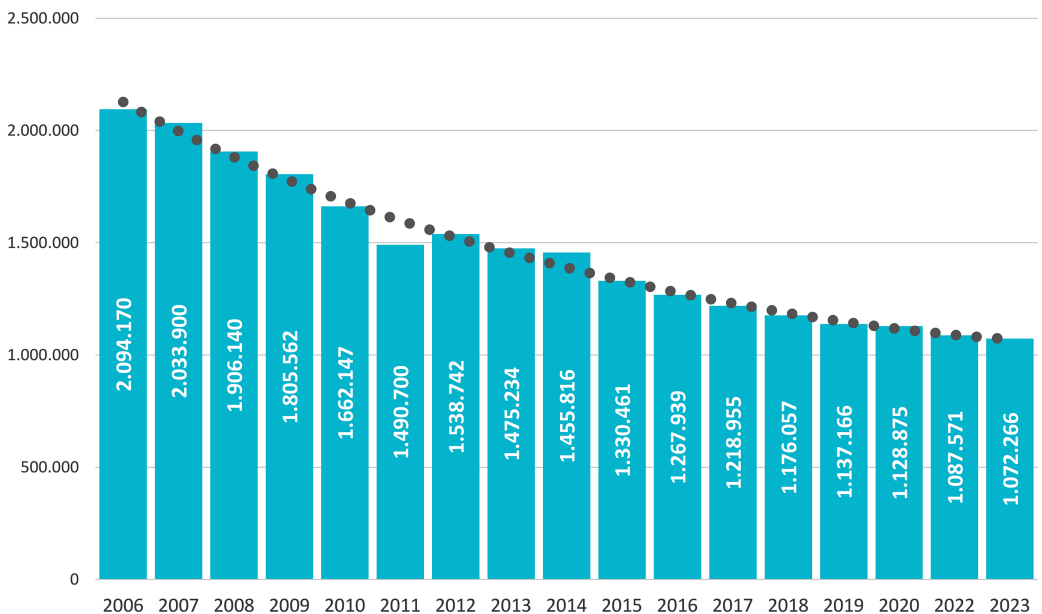


Figure 1: Decline of number of social housing units in Germany /Source: Compiled by authors, based on data from the German Bundestag, 2018, 2019, 2023

ministerium für Wohnen, Stadtentwicklung und Bauwesen, 2023). The underlying reason is that more housing units are removed from the social housing stock than are being added each year, resulting in a clear downward trend over the years (figure 1).

Since social housing is a matter at federal state level, there are substantial differences in the number of social housing between the different states, as shown in figure 2.

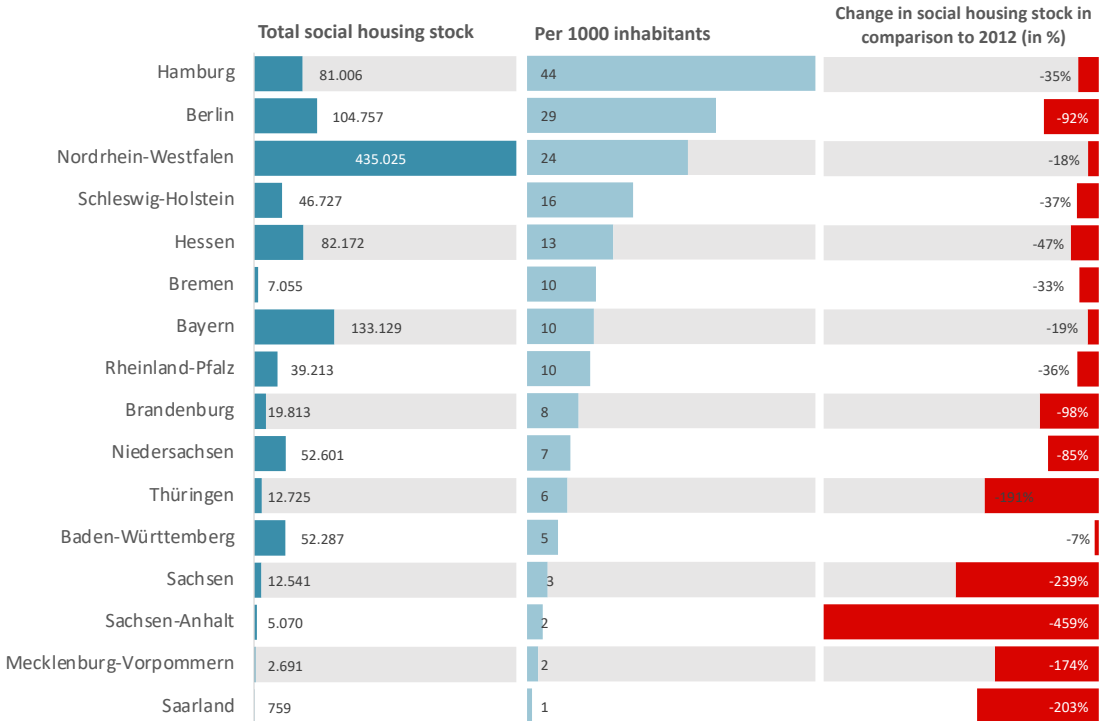


Figure 2: The social housing stock in Germany in 2022, disaggregated by state / Source: Compiled by authors, based on Deutscher Bundestag, 2018, 2023

### 1.3 Who can get access to social housing, and by which procedure and criteria?

Since 2001, the Housing Promotion Act (WoFG, 2001, §1) specifies that subsidised housing is aimed at “households that are unable to provide themselves with suitable housing on the market”, “particularly [for] low-income households and families and other households with children, single parents, pregnant women, elderly, disabled, homeless and other people in need of help”.

Someone is eligible for social housing if they can present a housing entitlement certificate (*Wohnberechtigungsschein* or *WBS*). This certificate is issued by the

municipalities based on income criteria set out in the housing programmes by the states. Furthermore, the size of the household determines the maximum size of the housing unit that can be accessed (WoFG, 2001, §10). The WBS certificate in itself does not guarantee access to social housing; rather, it is the responsibility of the certificate holder to secure accommodation from the existing stock of social housing units (Sozialplattform, 2021). As the supply of social housing is insufficient to meet the demand, especially in the larger urban areas, it may be difficult to find a social housing unit. Depending on the urgency, certain groups could be given priority to be housed in units where the municipalities have allocation rights. However, unless the households are considered homeless and therefore have the right to be accommodated by the municipalities (generally without lease or tenancy rights), even cases that are considered urgent do not necessarily receive a rental unit.

The WBS certificate is valid for one year. Should the household not have found housing within this period, they will need to reapply for the certificate. However, once the household has found housing, they only need to show the certificate at the start of their tenancy and can thereafter stay indefinitely, even if their income exceeds the maximum threshold. In theory, states could request the payment of a compensation from households who exceed the maximum threshold (WoFG, 2001, §34-37); however, in practice this is only applied by very few states. One reason is that there is a significant bureaucratic burden involved in checking households' incomes. Moreover, governments value that higher income households who decide to stay contribute to the social mix in poorer neighbourhoods.

Generally, landlords providing social housing are free to select their tenants among the entitled households (those in possession of a WBS). An exception is when the municipality draws up a contractual agreement (referred to as *städtebaulicher Vertrag*) which stipulates certain requirements that the investor needs to fulfil. Such agreements often exist between municipalities and municipally-owned housing companies or have been negotiated in the privatisation processes of former municipal or state-owned housing. Requirements may include providing a certain percentage of social housing and/or granting allocation rights for part of the social housing to the municipality. The municipality can then specify either exactly which households these units should be given to – or, more common, gives the landlord a choice of three households, one of which the unit must be allocated to. However, rental units with allocation rights comprise only a fraction of the social rental housing stock. Where no allocation rights exist, landlords often tend to favour households that are on the higher end of the WBS income range.

#### **1.4 What is the socio-economic composition of the population living in social housing projects?**

There is no information on the socio-economic composition of the population living in social housing. Eligibility is based on income, but is only assessed during the process of issuing the WBS certificate (see above). Generally, people tend to have lower incomes, but as the income assessment is only done at the time of signing the rental contract, some people might have much higher incomes later on. There are special

programmes and projects for people with particular socio-economic circumstances, such as people with refugee status, former prisoners or former homeless people. These make up a very small percentage of the total social housing stock.

### **1.5 Who owns the social housing stock?**

As elaborated above, social housing subsidies are available to a wide range of housing market actors, ranging from municipal housing companies to private housing companies to financialized housing actors. Over the last decades, significant shifts in the ownership of the social housing stock have occurred, mostly in the direction of privatisation (see policy trajectory section below). According to Kofner (2017, p. 65), “approximately 300,000 social rental dwellings are in the hands of listed housing companies and another 600,000 are owned by private individuals and non-listed private housing companies”, meaning that “three-fifths of the German social housing stock belong to private landlords”. This, together with the shift towards for-profit of social housing provision at the turn of the millennium, demonstrates the market orientation of Germany’s social housing policy over the last decades. Thus, the majority of housing actors consider housing as a commodity. There are, however, a few exceptions to this, namely municipal housing companies and cooperatives, which typically operate under a not-for-profit objective.

Paradoxically, existent municipal and cooperative housing, although not necessarily built with social housing subsidies, tends to be more affordable than newly built social housing. Due to their not-for-profit seeking nature, their rents are often lower than those provided through privatised actors putting social housing on the market at below-market rents. According to data from the 2011 census, 5.8% of residential dwellings were owned by municipalities or municipal housing companies, and a further 0.7% by the states or federal republic. Another 5.2% of the housing stock were owned by housing cooperatives (Statistische Ämter des Bundes und der Länder, 2015). In 2022, residential dwellings owned by municipalities or municipal housing companies have increased to 6.2% of the total housing stock; however, units owned by cooperatives and the states or federal republic have gone down to 5.0% and 0.4% respectively (Statistisches Bundesamt, 2022b).

### **1.6 Who pays for the construction and maintenance of social housing?**

As for the construction of social rental housing, the system of subsidised loans has been elaborated on above. General maintenance is the responsibility of the landlords, with minor repairs to be covered by the tenants.

Social housing in Germany is a funding system accessible to all, which means that there are private owner-occupiers paying for their own housing as well as a very large range of housing providers paying for construction and maintenance of their rental social housing. A large percentage of the rental social housing stock belongs to public or publicly controlled housing companies.

## 2 Characterisation of “affordability”

### 2.1 How is “affordability” defined in conceptual and operational terms in the country’s social housing system?

Germany collects data regarding the housing cost overburden as defined by the European Union through the yearly micro-census, which includes the standardised questions of the European Union Statistics on Income and Living Conditions (EU-SILC). In this definition, the housing cost overburden rate is “the percentage of the population living in households where the total housing costs (‘net’ of housing allowances) represent more than 40% of disposable income (‘net’ of housing allowances)” (Eurostat, 2021).

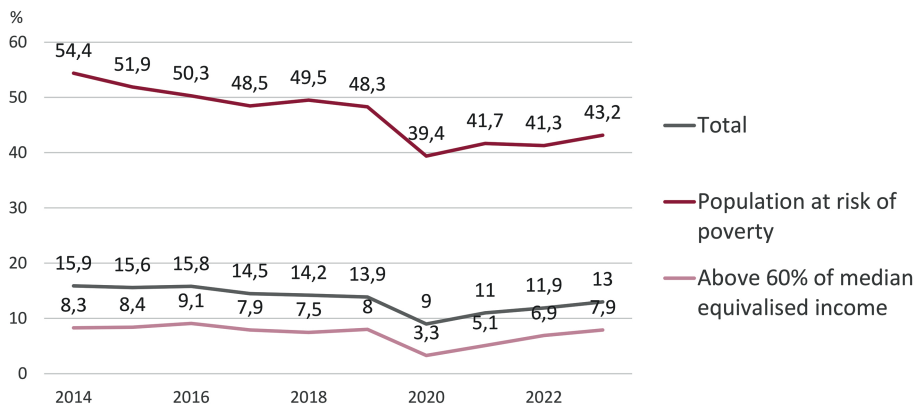


Figure 3: Housing cost overburden rate by poverty status in Germany, EU-SILC survey / Source: Eurostat, 2024

Between 2014 and 2020, the housing cost overburden for the population at risk of poverty decreased slowly, with a noticeable drop in 2020, although it has been rising since then (figure 3, Eurostat, 2024). Housing costs as proportion of disposable household income have also gone up from 21.5% in 2020 to 25.2% in 2023 among the total population and from 42.7% to 43.7% among the population at risk of poverty (Statistisches Bundesamt, 2023f).

The *Bündnis für Wohnen im Land Brandenburg* (Alliance for Housing in the State of Brandenburg) further notes that “a lack of affordability of housing can be assumed especially if, after deducting the rent, there is not a defined absolute minimum amount left as the monthly household budget for living” (Verband Berlin-Brandenburgischer Wohnungsunternehmen e.V. (BBU), 2019). What the Alliance proposes is to consider that after housing costs have been deducted, a minimum amount should be remaining for other household costs, ranging from € 670 for a one-person household to € 1,463 for a four-person household.

## 2.2 What mechanisms guarantee that social housing is affordable for households?

The main mechanism of making social housing assistance affordable in Germany, as discussed above, is the rent cap (fixing maximum rents) on social housing. However, rent caps are defined at local level in function of average rental prices for the area. Especially in the larger urban areas and more affluent parts of Germany, where rents are increasing rapidly due to population inflows and decreasing housing sizes (OECD, 2018), the rent caps are not necessarily affordable. This is exacerbated due to a shortage of social housing.

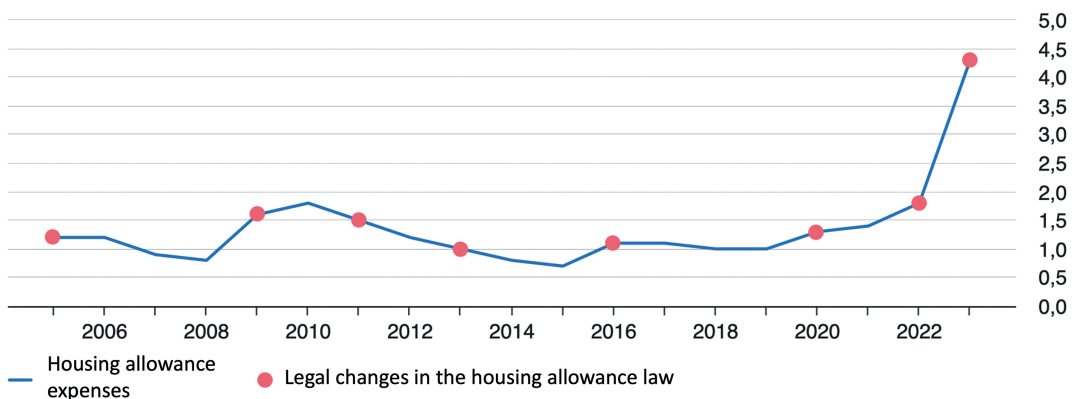
Further measures to control rent increases apply to the entire rental sector, thus also to social rental housing. One measure is a limit imposed on how much landlords can increase rents of existing rental contracts, amounting to maximum 15% over the course of 3 years (Bürgerliches Gesetzbuch (BGB), 2002, § 558). Another is a limit on how much rents can be increased upon re-letting to new tenants: landlords may not charge rents that exceed the local comparative rent by more than 10% (BGB, 2002, § 556d). The caveat for this latter measure, referred to as the *Mietpreisbremse*, is that it only applies if the previous tenant's rent was not already above local comparative rent. The burden of the proof for this is with the new tenant, who would need to sue the landlord. This renders the measure ineffective in practice, since tenants are hesitant to jeopardise the relationship with their landlord.

Another mechanism to assist low-income groups in their housing costs is the housing allowance or *Wohngeld*. This allowance “aims to support those households which would otherwise not be able to find appropriate accommodation on the housing market” (Federal Ministry of the Interior and Community (BMI) [Germany], n.d.). This allowance is available regardless of whether or not the household has access to social housing (Kofner, 2017). It is accessible to tenants, in which case it is called a rent subsidy (*Mietzuschuss*) and to homeowners, to support mortgage repayment and other housing related costs (called *Lastenzuschuss*). This mechanism aligns with the vision of a free housing market, with limited interference by the state.

The local housing allowance authorities (*Wohngeldstelle*) of the municipal, city, district or county administration are responsible for distributing the housing allowance, which is partially funded by the federal government and partially by the federal state. Eligibility for housing allowance is calculated based on the number of household members, the rent or mortgage to be paid and the total income of the household members. Rents should not be above a certain threshold set according to location types. This threshold generally compares to average rental prices. Furthermore, there is a limit in the eligible size of the housing. Those on social assistance are not eligible for the housing allowance as they receive housing benefit through the social welfare system. The application for housing allowance should only take a few weeks, but is complicated. If approved, the allowance is valid for one year

and must be reapplied for each year as long as the household continues to meet the eligibility criteria. This results in a considerable bureaucratic burden, both for the applicant and the responsible authorities.

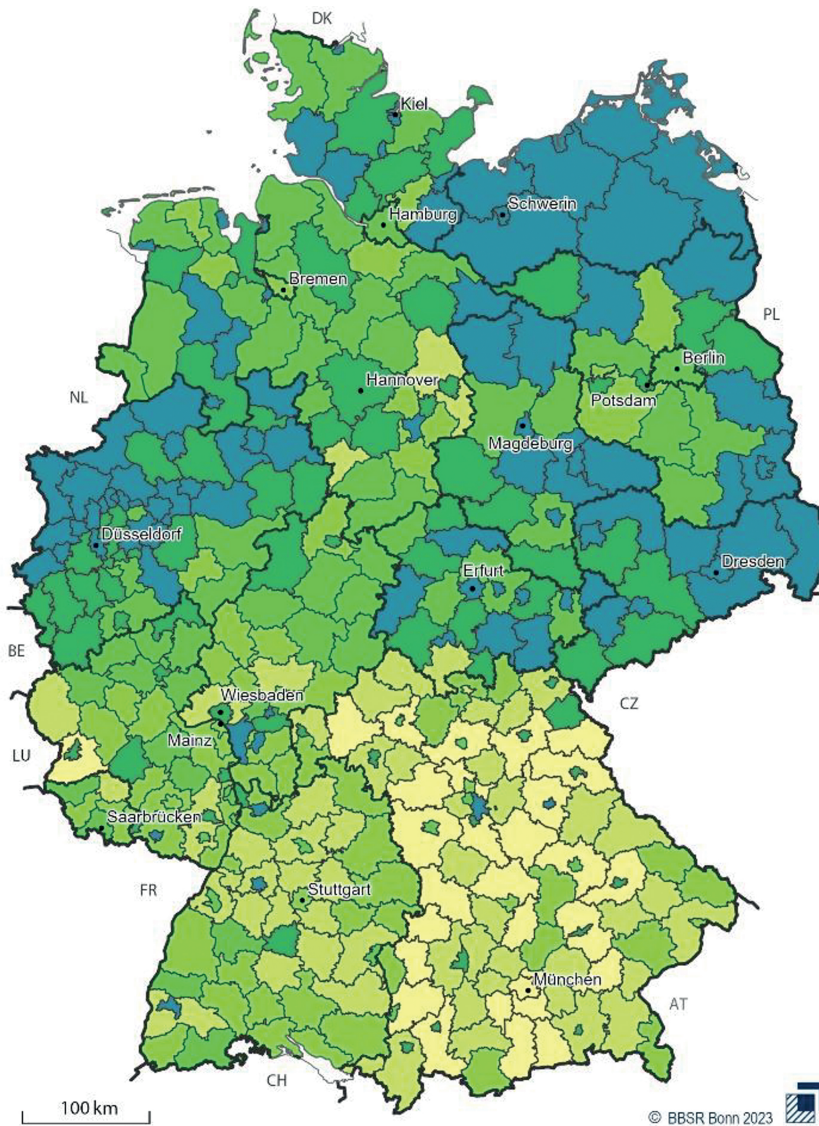
At the end of 2021, around 595,300 households, representing about 1.5% of all households in Germany, received a housing allowance (Statistisches Bundesamt, 2023c). New legislation that came into effect on 1 January 2023 reformed the housing allowance, resulting in a significant increase in the number of households that benefit (1.1 million) (Statistisches Bundesamt, 2023e), and about a doubling in the average amount received, from 180 EUR to 370 EUR. What also changed is that the allowance includes a component for covering the increasing costs of heating and may also cover a climate component, reducing potential rent increases resulting from renovations aimed to make buildings more energy efficient (Presse- und Informationsamt der Bundesregierung, 2023). Due to this reform, the housing allowance expenses by the Federal Republic have increased steeply (figure 4).



2022 and 2023: This includes the heating cost subsidy, which was fully borne by the federal government in accordance with the Heating Cost Subsidy Act of 29 April 2022 (BGBl. I S. 698)

Figure 4: Housing allowance expenses (in billions of EUR) / Source: Statistisches Bundesamt (Destatis), 2024, translated by authors

For those receiving a housing allowance, average income unsurprisingly is low compared to the average salary in Germany, as this is one of the eligibility criteria. Housing allowance beneficiaries' monthly salary is on average 1,057 € against 4,100 € on average for Germany. More than half of the beneficiaries (55%) are single households and more than a quarter (27%) live in Nordrhein-Westfalen. This can be partially explained as it is Germany's most populous state, housing 21% of the total households; yet the amount of housing allowance beneficiaries is also higher than average. Apart from Nordrhein-Westfalen, on average more housing allowance beneficiaries live in former East Germany (a difference of 6% compared to the total



### Proportion of households receiving housing allowance in 2021 in %.



Datenbasis: BBSR-Wohnungsmarktbeobachtung;  
 Statistisches Bundesamt: Wohngeldstatistik 2021,  
 reine Wohngeldhaushalte ohne Heimbewohner;  
 Nexiga GmbH: Private Haushalte 2020

Geometrische Grundlage: VG5000 (Kreise),  
 Stand 31.12.2021 © GeoBasis-DE/BKG  
 Bearbeitung: M.Haake

Figure 5: Proportion of households receiving housing allowance in 2021 in % / Source: Bundesministerium für Wohnen, Stadtentwicklung und Bauwesen, 2023, translated by authors

number of households). Baden-Württemberg, as one of the more affluent states of Germany, has about 3% less beneficiaries than the German average (figure 5) (data of the entire paragraph based on Statistisches Bundesamt, 2023d).

Compared to access to social housing, the housing allowance is more accessible and more people are eligible for it. However, it needs to be controlled through complex systems of rent control to avoid a spiral of rental increases. This can be caused when tenants receiving housing allowance can afford higher rents, leading to landlords increasing the rents further, resulting in the need for higher housing allowances, etc. This control is only partially successful. In Baden-Württemberg, for example, average rents have increased from 7.5 €/m<sup>2</sup> in 2018 to 8.13 €/m<sup>2</sup> in 2022 (Statistisches Bundesamt, 2022b). Moreover, these averages hide large differences between rural and urban areas. Rental prices per square meter in Baden-Württemberg are currently highest in Konstanz (15.78 €/m<sup>2</sup>) and lowest in Sankt Georgen in Schwarzwald (8.01 €/m<sup>2</sup>) (Miet-check.de, 2024).

### 3 Policy trajectory

#### 3.1 What have been the main developments in the recent past (30 years)?

In order to understand the recent past, it is helpful to briefly present the rise of the cooperative movement at the turn of the 20<sup>th</sup> century. During the time of rapid urban expansion and industrial revolution, the first precursors to “social” housing were often built and provided by private factory owners for their workers, or built for state employees such as railway or post office workers. With the rise of worker self-organisation in the 19<sup>th</sup> and early 20<sup>th</sup> century, the cooperative movement gained traction and housing cooperatives were first set up by industrial workers associations and state employees. These cooperatives were characterised by collective ownership and a strictly democratic management structure, with one vote per owner of cooperative shares. The German cooperative law enshrining these principles dates back to 1889. It provided both the legal basis for housing cooperative lending and secured specific tax exemptions. In particular, cooperatives profited from the so-called Non-Profit Housing Act (*Wohnungsgemeinnützigkeitsgesetz, WGG*), which secured specific tax exemptions for non-profit housing actors. However, workers associations were disbanded during the Third Reich (1933–1945) and cooperative housing management bodies were replaced with national socialist party officials. Existing associations of cooperatives were merged into large regional monopolies with huge administrative bodies.

During the reconstruction period after WWII, East and West Germany set off on vastly different housing policy trajectories. In West Germany, most of the former regional Nazi-run cooperatives called *Neue Heimat* were merged into a cooperative body of the same name. With a revised Non-Profit Housing Act still in operation, the *Neue Heimat* became the main beneficiary of the newly devised social housing subsidy and produced mass housing on a large scale, with over 400,000 new units built until

the 1980s. Policies started to shift after that, largely fuelled by a massive management scandal centred around the Neue Heimat. This contributed to the perception of cooperatives as outdated management structures in charge of huge and undesirable housing blocks. Coupled with a decrease in housing demand, this negative image led to the cancellation of the Non-Profit Housing Act and its tax exemptions for housing cooperatives. As a result of the management scandal, the Neue Heimat was disbanded and large parts of its housing stock privatised. The wave of privatisation of social housing stock continued even more vigorously in the 1990s. Most of the former state or municipal owned social housing units were sold to private companies and eventually re-sold to financialized housing actors.

Post-war East Germany (GDR), on the other hand, set up an extensive state-run housing development programme, effectively making almost all of the new-built housing stock state-owned “social housing”, to be accessed by all citizens of the GDR, according to need and merit. In 1998, 3 million housing units were in state ownership, with an additional 1.1 million owned by housing cooperatives. Rents were set at an average of 90 pfennig per m<sup>2</sup> (equivalent to about 0.75 €/m<sup>2</sup> today). During the reunification process, former state-owned housing initially came into municipal ownership, but due to the way in which former fictitious debts were converted into real debt as part of the reunification process, most municipalities were forced to sell off their housing stock to private companies. In addition, new legislation termed ‘Old Debt Relief Act’ (*Altschuldenhilfegesetz*) forced all housing companies, including cooperatives, to sell 15% of their housing stock.

From 1997-2005, the acquisition of private housing property – basically the opposite of the socialist model – became heavily subsidised through the home ownership allowance (*Eigenheimzulage*). It was not until 2006 that social housing subsidies were revived with the cancellation of the home ownership allowance.

The Federalism Reform of 2006 transferred decision-making competencies on social housing from the national government to the states and municipalities, making the federal republic powerless in the matter. However, this was partially reversed through a 2019 addition in the Constitution which stipulates that “The federal government can grant the States financial aid for investments in the area of social housing by the states and municipalities (municipal associations) that are significant for the state as a whole” (Grundgesetz Für Die Bundesrepublik Deutschland, 2022 art. 104d).

There has been a growing recognition of the difficulties that households face due to the steadily rising cost of living and the tight housing market. The current federal government has therefore established that 400,000 housing units should be built in Germany every year, of which 100,000 would be financed through the social housing subsidised loans. Funding will be increased to “a record 14.5 billion euros” by 2026 and in order to speed up construction, “once housing type approvals have been granted, they will be valid throughout the country, which will ensure the wider use of serial and modular construction” (The Federal Government, 2022). However, the government fell well short of its target in 2022. Only 295,000 units were completed,

among which only 25,000 for social housing (Deutschlandfunk, 2023). Despite social housing subsidies reaching an all-time high today, the social housing stock is in constant decline. The inefficiencies of this system are not currently addressed.

### **3.2 What are the current main challenges and developments in the sector?**

Land is an increasingly scarce commodity. On top of that, one of the measures of Germany's sustainability strategy is to reduce land consumption to a maximum of 30 ha/day by 2030 and 'no net land take' by 2050, further limiting the availability of land (Federal Ministry for the Environment, Nature Conservation and Nuclear Safety, 2020). The rise in land prices has led to sharp increases in property prices and rents. The proportion of land costs in the cost price of an apartment already exceeds 50% in attractive locations (Bunzel et al., 2017). Especially in growing urban areas, where housing is in high demand because of migration, the increase of single households and the increase of floor space per person, land and housing are becoming an attractive investment for international financial investors, leading to the financialisation of the housing market and encouraging speculation. Even if at the moment the national state seeks to provide more funding for the construction sector to relieve the increasing construction costs, these conditions will continue to make the provision of affordable housing in these areas very challenging. A revision of the social housing subsidy programme in Baden Württemberg in 2015 is aimed at contributing to making investment in social housing economically viable again.

Because the current system of subsidised loans limits the time that housing is considered social housing, there is no durable build-up of a social housing stock. Therefore, social housing continuously needs to be developed to keep up the stock. This is a policy choice, with the underlying idea that the subsidy should only be a temporary correction of the market provision of housing. However, the recent recognition of the need for social housing for low-income and other vulnerable groups shows that this idea does not hold. Higher financing costs due to rising land prices and construction costs result in fewer housing units, making this a very expensive system of social housing provision. The expansion of households eligible for housing allowance and the increase in the allowance itself since the beginning of 2023 (see above) further increase the government's expenses towards making housing more affordable. This increase in spending will have to be balanced through income increasing or spending reduction measures.

Germany has the highest proportion of households renting in the EU, with 53.5% of the population renting their housing unit (Statistisches Bundesamt, 2022a), a number which has been increasing rather than declining in the recent years. Typical for the German housing market is also the large amount of people living in shared accommodation (*Wohngemeinschaft* or *WG*). Mostly comprising of students and young adults, their amount is estimated at around 1.4 million people in 2020, an increase of 18% in comparison to 2010 (WG Match UG, n.d.).

In general, tenants are well protected in the German system. Rental contracts do not have an end date, ending a tenancy agreement by the landlord is only possible when they have good reason to, and rent increases are controlled by law. Thus, the longer a tenant is in a property, the less they pay in comparison to average rental market prices, thereby incentivising them to stay rather than move. Indeed, Kemp and Kofner (2010, p. 394) observe that “residential mobility is relatively low in Germany, something that is both a cause and an effect of the long leases and strong security of tenure”. Turner et al. (2017) refer to research based on the German Socio-Economic Panel Study which found out that “as of 2010, the mean tenancy in Germany is 11 years, and the median tenancy length since 2006 has been approximately six years” (p.13), concluding that “on the one hand, this is evidence of greater stability, on the other, it may reduce labour market flexibility, by making it more difficult for tenants relocating for work to find accommodation” (p.15). With regard to social housing, the moment that social housing ceases to be social, rents can be adjusted to market prices, leading to sometimes hefty rent hikes, although regulations are in place to cushion these increases for existing tenants.

Demographically, Germany’s population is ageing. More than one in four people are aged 60 and over (Statistisches Bundesamt, 2016). Around half of them are owner-occupiers, who are mostly living in one or two-family houses (78%). Elderly tenants, on the contrary, mostly live in an apartment building (79%). Nevertheless, average living space per person among the elderly is almost 1.5 times that of younger households: 60 m<sup>2</sup> compared to 40 m<sup>2</sup>. This difference is especially apparent among single-person households, who on average have 78 m<sup>2</sup> of living space compared to 65 m<sup>2</sup> for younger singles. It is likely that this is an effect of the low residential mobility in Germany, with the Statistical Office noting that “it is relatively rare for older people in Germany to move house: in 2014, almost four million moves beyond municipal boundaries were registered nationwide, of which only 242,000 could be attributed to the generation 65+. Whilst 6% of under 65-year-olds moved to a new place, this rate was just 1% for older people.” (Statistisches Bundesamt, 2016, p. 13). The tightness of the housing market is therefore not necessarily due to a shortage of housing but also to an asymmetry in housing space consumption.

In the social housing sector, the energy transition illustrates the tension between environmental targets and affordability. In order to combat climate change and to reduce dependence on fossil fuels for geopolitical reasons, Germany is increasingly resorting to renewable energy. In 2024, newly installed energy systems should run on at least 65% renewable energy and Germany aims to be fully climate neutral by 2045 (Federal Government, 2023). The costs for this transition will be subsidised and can only partially be recovered through rent increases. As mentioned above, the housing allowance now includes a climate component to offset these costs. While the transition itself is expected to be costly, in the long term, renewable energy sources and energy saving measures could potentially reduce energy costs. In the short run, however, increased energy efficiency standards add to the cost of social housing construction, thereby making it less affordable.

### 3.3 How do you see the future development of the sector?

Germany's population is stagnating and becoming more diverse. If not for the large influx of migrants, especially from Syria in 2015 and Ukraine in 2022, it would already be reducing (Statistisches Bundesamt, 2023b). This trend is already visible in the eastern and in the more rural parts of Germany, whereas the population of urban areas and in western Germany is still increasing. This also has an age component: it is mostly the youth who are moving from East to West and from the village to the city. Demand for housing is therefore reducing in these shrinking areas while still increasing in areas of population growth. While the demand for housing is likely to stagnate, investments will remain necessary to keep the housing stock adapted to future needs, especially in terms of accessibility, inclusivity and sustainability.

The current housing deficit cannot be solved only by new construction, since affordability due to price inflation is decreasing. This is why the call for reintroducing not-for-profit housing has been growing since 2010. The current government's coalition agreement of 2022 includes this measure, but no law has been drafted yet. Unsurprisingly, this proposal is not supported by the privatised housing companies and there has been little response from the municipal or state-owned companies either. It thus remains to be seen if and when this measure will be reintroduced and what its impact will be.

## 4 Social housing in Tübingen

*Note: data provided below are from Tübingen municipality, unless otherwise specified.*

### 4.1 How does the local situation compare with the national characterisation presented above?

Tübingen is a secondary city located in the State of Baden-Württemberg, in the southwest of Germany. Tübingen's population has been steadily rising, from 83,317 in 2011 to 92,170 in 2021 (figure 6), with a small dip in 2020. This can be explained by a reduced number of students settling in Tübingen due to COVID-19. As a university city, a large share of its population is student – the student population at Tübingen University is 28,000, though not all are resident in the municipality. Most people (around 60%) rent, against around 40% owner-occupiers. Parallel to population growth, the housing stock has equally been increasing. Between 2011 and 2022, almost 4,000 new units have been added to the housing stock, amounting to a total of 43,650 housing units in Tübingen. Of Tübingen's total housing stock in 2022, 1,345 units or about 3.1% are social housing. This is above the national average of 2.5%. Contrary to Germany overall, the majority of these units, about 900 of them, are owned by the municipal housing company, while the rest is owned by a variety of actors.

## Demographic development

### Demographic development 2011-2021

Number of residents

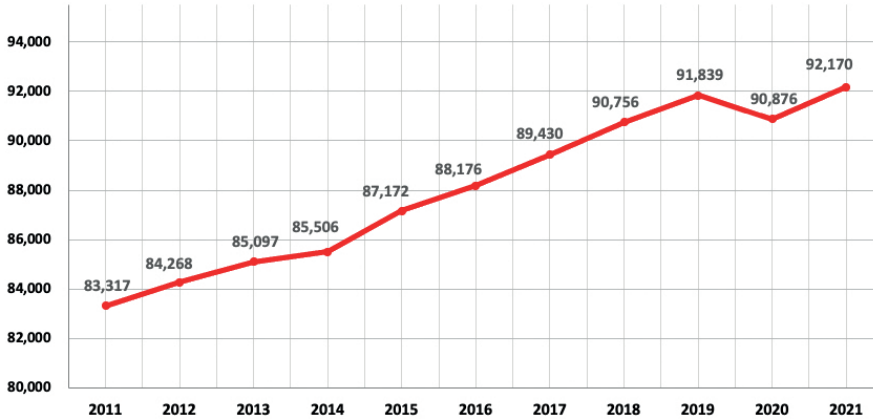


Figure 6: Population growth of Tübingen Universitätsstadt from 2011 to 2021 /Source: Tübingen Universitätsstadt, 2023. Translated by authors

In line with national trends, rental prices are growing sharply, especially in the city centre and newly developed areas in close proximity to the city centre. Average prices have increased from 9.44 €/m<sup>2</sup> for existing housing units and 11.47 €/m<sup>2</sup> for new housing units in 2012 to 13.25 €/m<sup>2</sup> and 15.47 €/m<sup>2</sup> respectively in 2023, way above the state average. The constant addition of new built units has done little to curb that rise, with rental prices for existing units following the rise in rental prices for new built units. Thus, the local comparative rent index, used to determine maximum rental prices for social housing, has gone from 7.95 €/m<sup>2</sup> in 2010 to 10.67 €/m<sup>2</sup> in 2022, an increase of 34% (figures 7 and 8). Therefore, although ever more households need access to social or affordable housing, it is increasingly difficult for the municipality to facilitate its provision.

## Rental price development

Development of the average net rents 2010-2018  
Net rent in Euro per m<sup>2</sup>

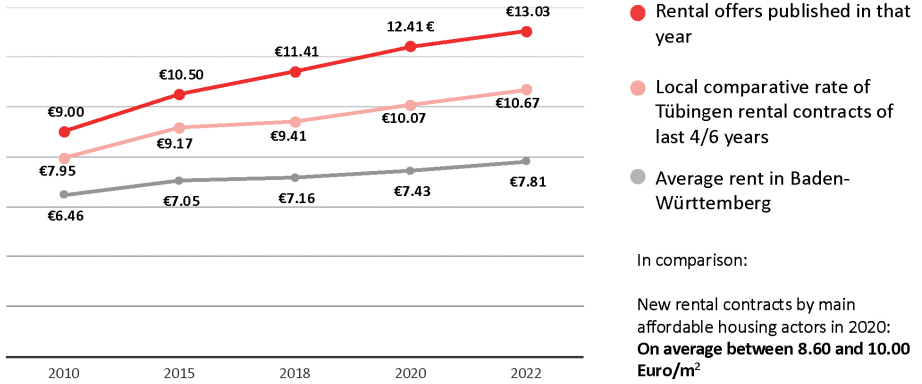


Figure 7: Rental price development: Development of the average net rents 2010-2018. Net rent in Euro per square meter /Source: Universitätsstadt Tübingen, 2023. Translated by authors

## Rental price development

Comparison of published rental offers in new builds and existing housing 2012 – 30/06/2023  
Net rental price in Euro per m<sup>2</sup>

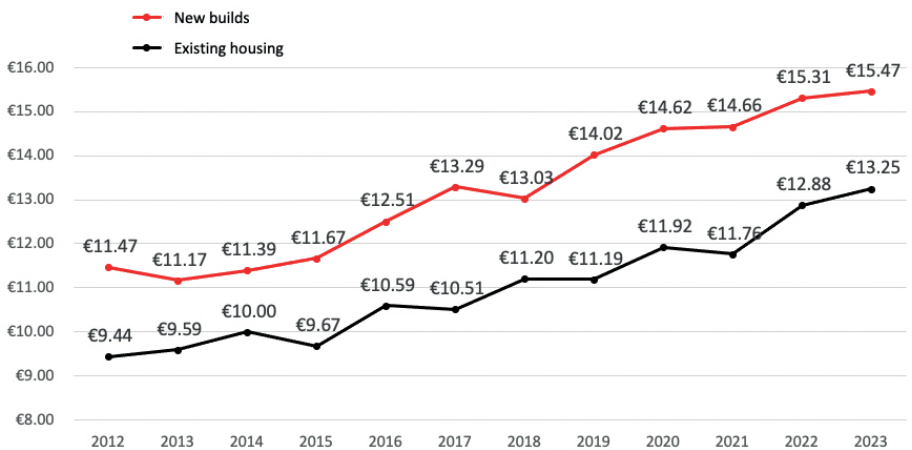


Figure 8: Rental price development: comparison between rents in new and existing buildings 2012–2023. Net rental price in Euro per square meter /Source: Universitätsstadt Tübingen, 2023. Translated by authors

## 4.2 What have been the main developments in the recent past (30 years)?

In the aftermath of Germany's reunification, French troops withdrew from Tübingen, leaving behind several military barracks. Moreover, several manufacturing companies such as a textile mill were no longer in use. The municipality therefore decided to halt greenfield development and focus on brownfield development. For the redevelopment of these areas, they held on to several development principles: small-scale mixed-use development, high urban density, the integration of old buildings, the inclusion of public and private spaces such as neighbourhood living rooms, and a variable division of plots developed by a variety of actors. This became known as the 'Tübingen Model', in which the municipality acts as developer: it acquires brownfield sites; develops the concept, urban form and development plan; provides the social and technical infrastructure as well as public spaces; manages decontamination and infrastructure development; manages overall development; and finances it by planning gains/plot sales. Plots have fixed prices and projects are chosen using qualitative criteria instead of price competition. These criteria include social and functional diversity, innovative housing concepts, the creation of added value for the neighbourhood and secure financing mechanisms. Private co-housing groups are encouraged to act as owner-builders. They have creative freedom within the development guidelines, are responsible for planning and building, get support from architects and project managers, and are responsible for shared spaces (green courtyards, underground car parks), thereby making them active players in the development of their neighbourhood. This has led to very individual and creative solutions, usually at a cost of 25 to 30% less than buying from a developer. Overall, up to 3000 housing units have been developed in this way.

However, land prices as well as house and apartment prices have risen sharply, making the housing market almost impossible to access for first-time buyers and increasingly difficult for renters even with higher-than average incomes. The municipality has taken measures to ensure a rising percentage of new-built rental housing will remain below market level. It has issued new regulations for developing land. In future housing projects, when municipal land is sold to housing developers, at least one third of the flats will be rental social housing with a social housing duration of at least 30 years, while another third will be rented below market rent as long as it is not owner-occupied. The remaining part cannot be rented out above market rent, as long as it is not owner-occupied. Should the owner-occupied housing be turned into rental housing within a thirty-year period, rent caps of 15% below local comparative rents apply. This way, the municipality guarantees that 90% of flats on former municipal land will have long-term fixed rents. An important criteria for municipal land sales is if developers offer permanently low rents by means of their statutes (such as housing cooperatives and other similar actors). For developers seeking to be granted municipal building rights on private land (i.e. the issuing of a new local development plan), one third of the newly developed housing will have to be social housing with a minimum duration of 30 years. In addition, the municipality is supporting non-profit housing developers such as cooperatives with an intrinsic interest in keeping rents permanently low.

## Social housing

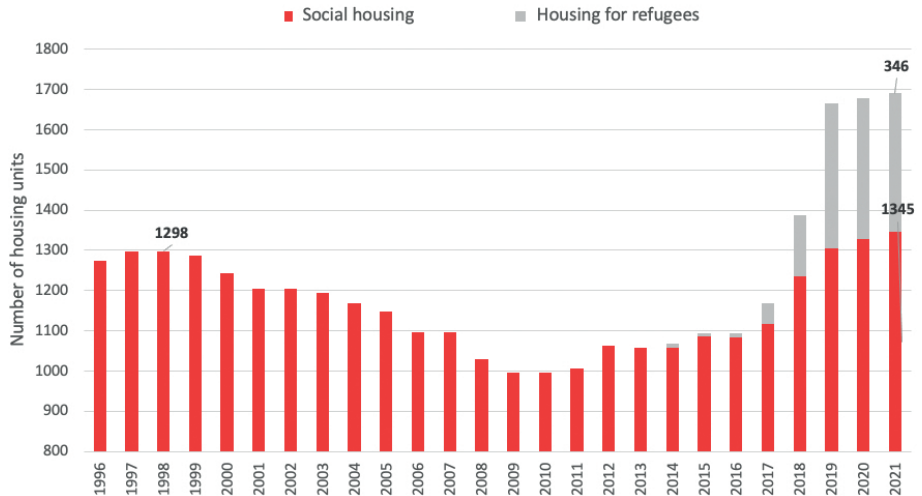


Figure 9: Social housing in Tübingen /Source: Universitätsstadt Tübingen, 2023. Translated by authors

The 2015 revision of the social housing subsidy programme of Baden Württemberg helped to make investment in social housing economically viable again. Since then, the municipal housing company has stepped up its efforts to provide new social housing, having realised more than 220 social housing units by the end of 2023. Spurred by the new municipal regulations, other actors, including some co-housing projects, have also started to develop new social housing, raising the number of social housing - against the national downward trend - from below 1000 units in 2010 to 1345 units in 2021 (figure 9). In addition, a 2015 subsidy programme for refugee housing has been used to construct an additional 346 rent-capped units used for accommodating refugees. Another measure that has been introduced makes it illegal to leave housing vacant for more than 6 months or to rent it out on a short-term (daily) basis, with fines as high as 50.000 euros.

### 4.3 What are the current main challenges and developments in the secto?

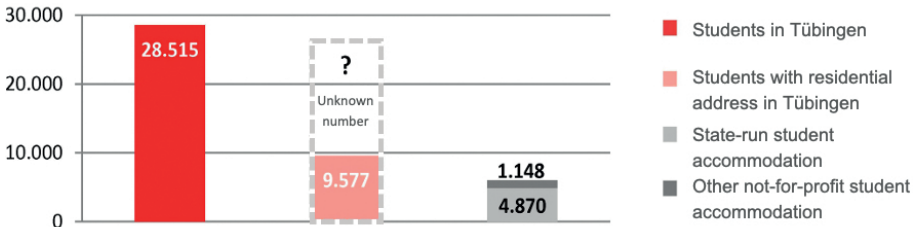
Overall, the cost of living has gone up, which reduces households' purchasing power and increases their risk of having housing cost overburden. Housing demand in Tübingen has not slowed down, with about 7000 new jobs predicted to be eventually created in the growing AI and biotechnology sector. The demand of highly mobile and mostly well-paid employees in this sector contributes to the continuous rise in rental and sales prices within the existing private housing stock.

In addition, the rising number of students also exerts further pressure on the private rental market. When comparing the number of higher education students to the

official student accommodation available (figure 10), it is clear that many students resort to the private market for their accommodation. As it is way more profitable for private landlords to split up larger rental units into individually rented rooms, students on individual rental contracts are outcompeting families in need of housing.

#### Students vs. Housing units in Tübingen 2017

Number of people and units



Sources: Eberhard Karls-Universität Tübingen, Studierendenwerk Tübingen 2017

Figure 10: Students vs. Housing units in Tübingen in 2017 / Source: Wohnraumbericht 2018, Universitätsstadt Tübingen, 2019. Translated by authors

As shown in figure 11, demand for affordable housing still is considerably higher than supply. The grey bars in figure 11 are the amount of housing entitlement certificates that the municipality has issued each year, allowing the holder to access social housing (see the section on mechanisms of housing affordability above). The red bars represent the number of new rental contracts in social or affordable housing by the main affordable housing actors. While the gap between the two has varied, the shortage of supply has been structural throughout the time period.

As the municipality continues to focus on facilitating the provision of social housing as well as other permanently affordable rental housing units, the rising cost of land, sharp rises in the cost of building materials and construction and especially the high interest rates for building loans severely curtail the possibilities not only for non-profit actors, but also for the municipal housing company to develop new units. As of recently, the municipality has therefore taken to develop its own housing units aimed mainly at young professionals such as kindergarten teachers and carers for the elderly, who have increasing difficulties finding affordable housing. Moreover, municipally owned land is finite, with the remaining parcels of municipal land expected to be fully developed within the next 10–15 years. The options to acquire more land for development are severely limited by both the municipal budget and current legislation stipulating the acquisition of land by municipalities at market prices.

At the same time, like the rest of Germany, Tübingen's population is ageing. The share of elderly people (65+) in Tübingen district (comprising of Tübingen municipality and 14 smaller municipalities) is projected to increase from 18% in 2020 to 24.1% in 2040 (Statistisches Landesamt Baden-Württemberg, 2020). Often, they prefer to stay in

their housing, even after their children have moved out, thereby occupying units that could house a larger family. Place attachment, the costs of moving and an increase of rental price per m2 might influence their decision. At the same time, the amount of single person households has been increasing disproportionately (by 5% between 2010 and 2017 as compared to by 1% for couples and by 0.5% for families with children), putting pressure on the housing market for smaller housing units.

## Housing need and supply

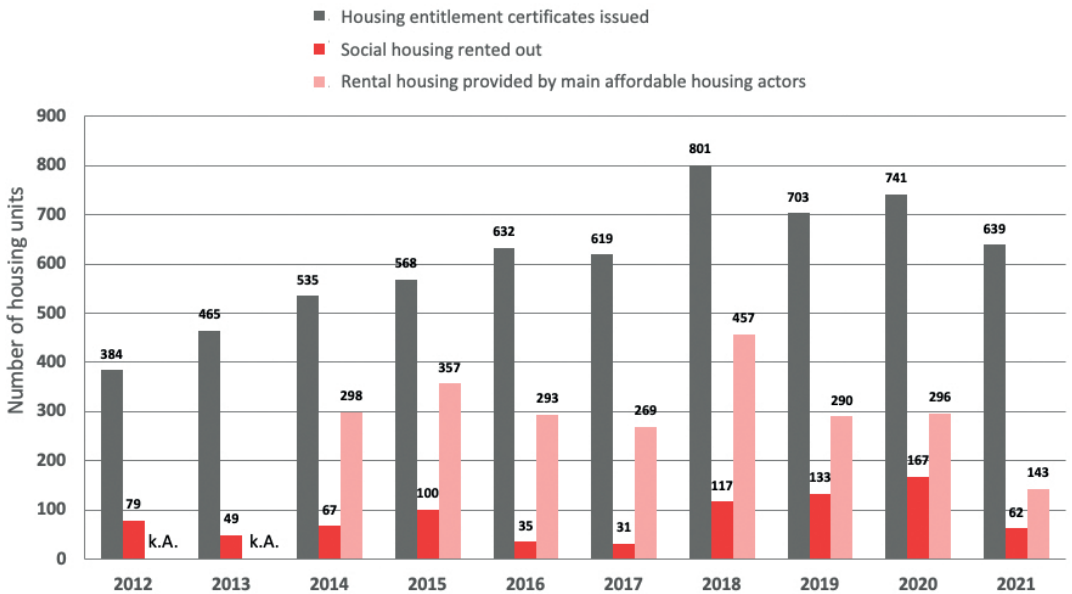


Figure 11: Housing need and supply in Tübingen /Source: Universitätsstadt Tübingen. 2023. Translated by authors

### 4.4 How do you see the future development of the sector?

The remaining parcels of municipal land are currently either in development or will be developed in the near future, with the current regulations leading to a further sizable amount of new social and affordable housing units expected to be completed each year. The main share of these units is expected to be developed by the municipal housing company, housing cooperatives and other non-profit actors. However, due to the rising costs of construction mentioned above, current projections might be at risk.

Therefore, the municipality is developing strategies to address affordability in the existing housing stock. With national rent regulation legislation lacking in effectiveness, one strategy is to incentivise private owners to turn their units into social housing

units by facilitating access to an existing, but rarely used, state social rental housing subsidy for existing housing stock. So far, about 50 private housing units have been converted in this way. However, with much more profitable letting options, such as student housing and temporary letting available to private landlords, the overall outcome of this effort remains to be seen.

Another strategy is reducing the need for new-built units and increasing the amount of available family housing by incentivising the older population to move to smaller housing units. New age-adapted housing projects with barrier-free access, as well as elderly care and community components are being facilitated by the municipality in most neighbourhoods and outlying villages. This strategy is expected to also help relieve the current crisis in elderly care, which is projected to become more severe as the population is aging. Other strategies to capture the potentials of the current housing stock are being promoted as well, such as looking into possibilities of sharing, paying reduced rent in exchange for providing assistance to an elderly home owner, and splitting existing larger units into smaller units so the elderly residents can remain in their private home while creating additional affordable units at the same time.

The continued provision of social and long-term affordable housing both in new-built and existing units will certainly help to alleviate some of the most urgent housing needs. Overall though, as long as Tübingen's population continues to grow and housing demand remains high, these measures will not deliver a sufficient amount of social and affordable housing. Generally, the policy measures available at a municipal level are unsuitable to curb the overall trend in rising rents, land and property prices in growing second-tier cities such as Tübingen.

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