

## PH4.2. SOCIAL RENTAL HOUSING STOCK

### Definitions and methodology

Social housing includes different forms of housing support across OECD countries, with considerable cross-national differences in terms of tenure, size and type of providers. For the purpose of this indicator, “social rental housing” refers to *residential rental accommodation provided at sub-market prices and allocated according to specific rules rather than market mechanisms* (Salvi Del Pero et al., 2016). Data used in this indicator are mainly taken from information provided by governments of OECD and EU countries in the OECD Questionnaire on Affordable and Social Housing (QuASH), as well as from National Statistical Institutes (NSIs). Additional details on social housing in the OECD and EU are summarised in the OECD Policy Brief (2020), “[Social housing: A key part of past and future housing policy.](#)”

### Key findings

#### ***The relative size of the social housing stock varies widely across countries.***

Social housing represents close to 28 million dwellings and accounts on average for 7% of the total housing stock in the OECD (8% in the EU). Most, but not all, countries have a social housing sector, though the definition of social housing, as well as the size of the sector, varies considerably across countries (Figure PH4.2.1). Accounting for over 20% of the total housing stock, the sector is largest in Austria, Denmark, and the Netherlands. Finland, France, Iceland, Ireland, and the United Kingdom have a moderately-sized social rental housing sector (between 10 and 19% of the stock). By contrast, the sector is relatively small (between 2 and 10% of the total stock) in Australia, Belgium, Canada, Czechia, Germany, Hungary, Italy, Japan, Korea, New Zealand, Norway, Poland, Slovak Republic, Slovenia, Switzerland, and the United States. The social housing stock is smallest in Colombia, Estonia, Israel, Latvia, Lithuania, Portugal, and Spain, where it accounts for less than 2% of the total housing stock (data on the number of dwellings in absolute terms are available in the online Annex, PH4.2.A1).

Several OECD and EU countries do not have a social rental housing stock as per the definition in this indicator. Chile has virtually no social rental sector, and in Mexico, public rental housing is only offered to armed-forces personnel. In Türkiye, social housing refers to owner-occupied housing sold below market rates to low-income populations. In Sweden, municipal housing associations provide dwellings and estates to a large share of low-income households, but rents are not set at below-market levels and are thus not considered as social housing in this indicator. These countries are thus not included in this indicator.

Further, in some countries, it can be difficult to distinguish between social housing and other types of housing tenure. For instance, in Ireland, traditional social housing is supplemented by dwellings that are publicly leased from private owners and allocated to recipients of housing allowances. Please refer

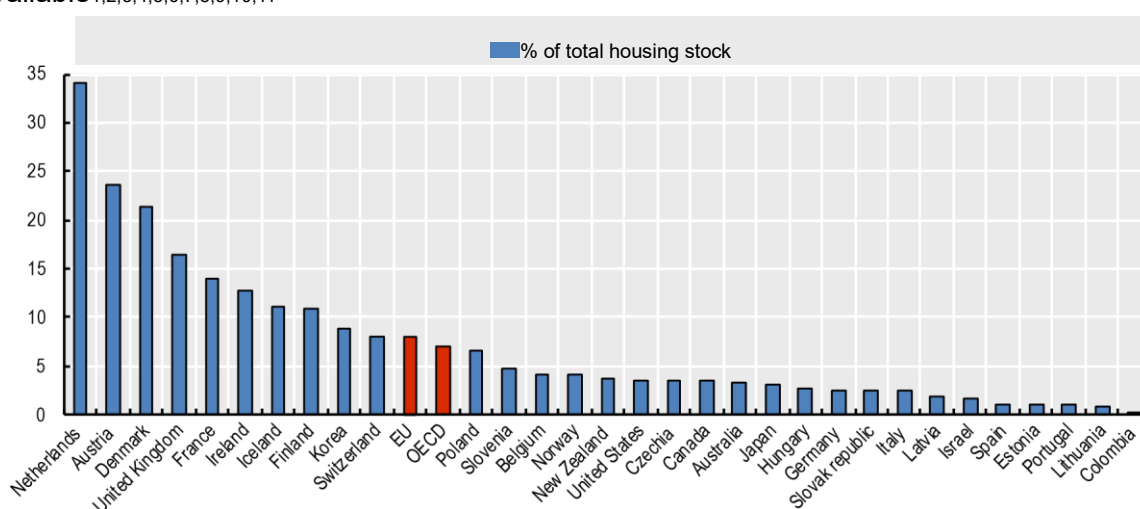
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to indicators PH 4.1 and PH 4.3, and the OECD Policy Brief, "[Social housing: A key part of past and future housing policy](#)," for further details.

## Figure PH4.2.1 Relative size of the social rental housing stock

Number of social rental dwellings as a share of the total number of dwellings, 2022 or latest year available<sup>1,2,3,4,5,6,7,8,9,10,11</sup>



Note: 1. For the Netherlands, the social dwelling stock is estimated based on rent levels charged by landlords as provided by the Ministry of the Interior and Kingdom Relations. These figures include units in private rentals provided below market rent and units provided by housing associations, excluding those provided at market-rate.

2. For Austria, data only refer to the main residence dwellings.

3. For Iceland, data might also include student housing rent from family members for free or at reduced rate.

4. For Australia, Estonia, Iceland, Latvia, and Spain, data are based on responses to previous QuASH rounds.

5. For Norway, data only contains dwellings provided by municipalities (about 75% of all social housing).

6. For New Zealand, data refer to the number of social housing places (public housing) that are funded through central government, and do not include social housing provided by local authorities.

7. For the United States, the social housing stock includes public housing, subsidised units developed through specific programmes targeting the elderly (section 202) and disabled people (section 811), as well as income-restricted units created through the Low-Income Housing Tax Credit (LIHTC) programme; the number of public housing units as well as section 202 and 811 dwellings financed through the LIHTC programme have been adjusted to avoid double-counting, following OECD correspondence with the U.S. Department of Housing and Urban Development. The data is preliminary.

8. For Canada, data do not include units managed by the Société d'habitation du Québec (SHQ) for the Province of Quebec.

9. For Spain, the figures may also contain other types of reduced rent housing, e.g. employer-provided dwellings.

10. For Lithuania, the share of social housing is calculated based on the previous years' total dwelling stock due to data limitations.

11. For Colombia, data only refers to social rental housing produced since 2019 in the semillero de propietarios programme.

Source: OECD Questionnaire on Social and Affordable Housing (QuASH) 2023, 2021, 2019 and 2016; Institut Bruxellois de Statistique et d'Analyse (2019); (Korea) Korean Statistical Information Service (2020); (New Zealand) Ministry of Housing and Urban Development New Zealand (2021); (Italy) data from Federcasa and the Tax Revenue Agency, based on OECD exchanges with the Bank of Italy, July 2023.

### **Social housing is typically provided by limited-profit NGOs and public authorities.**

There are different providers of social rental housing. Figure PH4.2.2 presents the relative size of the stock managed by the different types of providers as a share of the total social rental sector in each

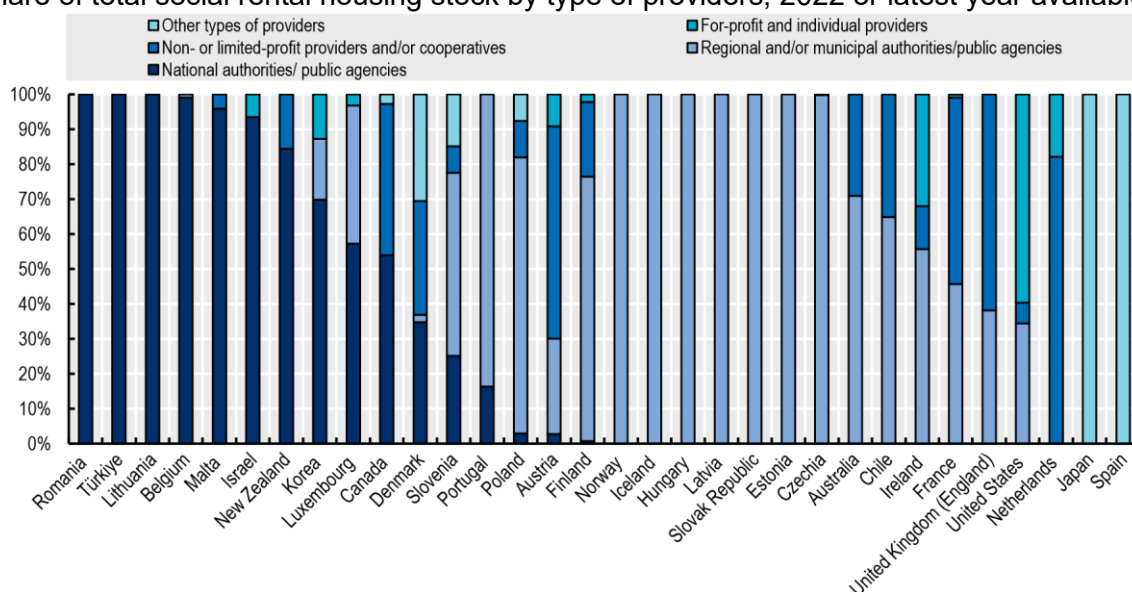
country. Regional and/or municipal authorities and agencies are responsible for providing at least half of the social housing sector in 14 countries. In some countries, central government agencies are involved in the direct provision of social housing, namely Belgium, Canada, Denmark, Korea, Luxembourg, Malta, New Zealand, Portugal, Romania, and Slovenia. With the exception of Iceland, sole provision of social rental housing by public authorities tends to be associated with a small social rental housing sector, as is the case in Hungary, Latvia, Lithuania, Norway, and the Slovak Republic.

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Meanwhile, in several countries with a large or moderate share of social rental housing, such as the Netherlands and Finland, there is a strong presence of non- or limited-profit housing associations. In the United Kingdom (England), as in Austria, a large non- and limited-profit sector coexists with a significant stock owned and managed by local authorities; however, local authorities in the United Kingdom (England) have sharply reduced their investment in the construction of new dwellings. Social housing in the HLM sector (*habitations à loyer modéré*) in France is primarily provided by regional and/or municipal authorities, and non-profit providers.

### Figure PH4.2.2 Providers of social rental housing in OECD countries

Share of total social rental housing stock by type of providers, 2022 or latest year available <sup>1,2</sup>



Note: 1. For Belgium, Canada, Denmark, France, Korea, Hungary, Iceland, Ireland, Japan, Latvia, Luxembourg, Malta, Norway, Portugal, Romania, Spain, Türkiye, and the United Kingdom (England), results are based on responses to previous QuASH rounds.

2. Data for Germany are not available, but in most states (*Länder*), the majority of social dwellings are provided by municipalities or other public institutions as well as housing cooperatives; in some states, private providers are responsible for a significant share of the social housing stock. 3. Data for Italy is currently being verified.

Source: OECD Questionnaire on Social and Affordable Housing (QuASH), 2023, 2021, 2019 and 2016.

### **The social housing stock has decreased in most countries over the past decade.**

The relative size of the social housing stock, measured as the share of social housing dwellings as a percentage of total dwellings, has decreased in 18 out of 25 OECD countries over the past decade. Finland, the Netherlands, and Poland experienced the most significant reduction in the relative size of the social housing sector (a decline of more than 2 percentage points). There was a small to moderate reduction (between 0.25 and 2 percentage points) in the size of the sector in Australia, Austria,

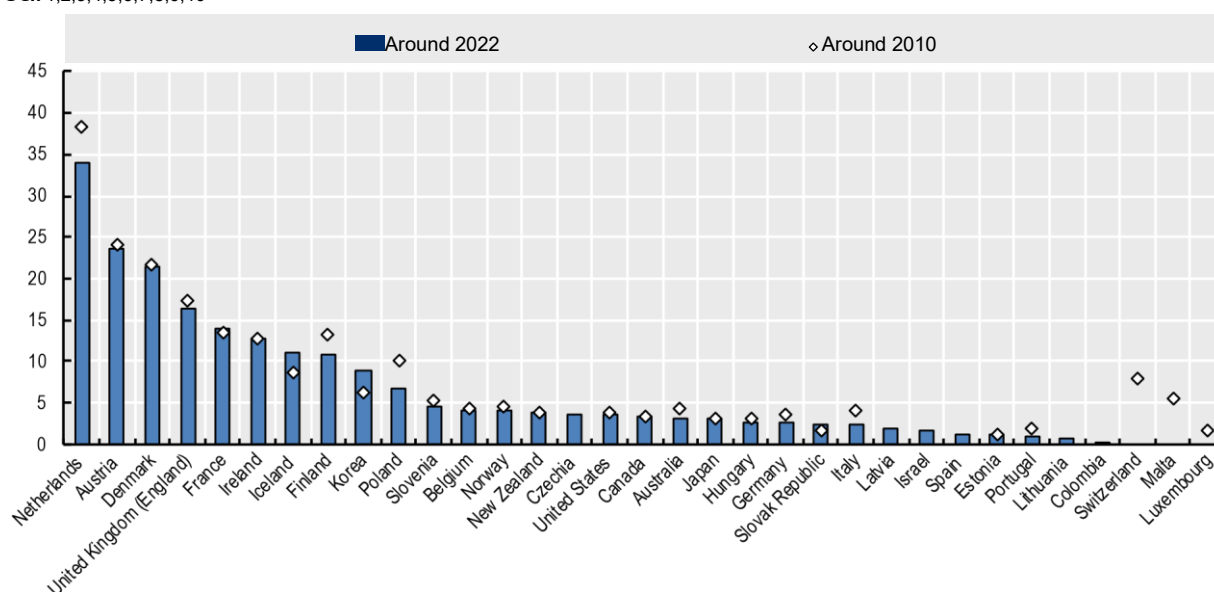
Denmark, Germany, Hungary, Italy, Norway, Portugal, Slovenia, and the United Kingdom (England), and a very small reduction (less than 0.25 percentage points) in Belgium, Estonia, Ireland, Japan, New Zealand, and the United States. The decline is partly related to a slowdown in new social housing construction, as well as the privatisation of the stock, whereby social dwellings are converted into market-rate rental housing (Germany), or are purchased by tenants and thus transition to the owneroccupied stock (the United Kingdom – England). By contrast, the relative size of the stock has increased by over 2.5 percentage points in Iceland and Korea since 2010 (Figure PH4.2.3).

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**Figure PH4.2.3 Social rental housing stock: trends over time**

Social rental dwellings, % of the total housing stock in selected years, around 2010 and 2022 or latest

year: 1,2,3,4,5,6,7,8,9,10



Note: 1. For the Netherlands, the social dwelling stock is estimated based on rent levels charged by landlords as provided by the Ministry of the Interior and Kingdom Relations. These figures include units in private rentals provided below market rent and units provided by housing associations, excluding those provided at market-rate.

2. For Austria, data only refer to the main residence dwellings.

3. For Iceland, data might also include student housing rent from family members for free or at reduced rate.

4. For Norway, data only contains dwellings provided by municipalities (about 75% of all social housing).

5. For New Zealand, data refer to the number of social housing places (public housing) that are funded through central government, and do not include social housing provided by local authorities.

6. For the United States, the social housing stock includes public housing, subsidised units developed through specific programmes targeting the elderly (section 202) and disabled people (section 811), as well as income-restricted units created through the Low-Income Housing Tax Credit (LIHTC) programme; the number of public housing units as well as section 202 and 811 dwellings financed through the LIHTC programme have been adjusted to avoid double-counting, following OECD correspondence with the U.S. Department of Housing and Urban Development. Data for 2019 is preliminary.

7. For Canada, data exclude units managed by the Société d'habitation du Québec (SHQ) for the Province of Quebec.

8. For Spain, the figures may also contain other types of reduced rent housing, e.g. employer-provided dwellings.

9. For Lithuania, the most recent share of social housing is calculated based on the previous years total dwelling stock.

10. For Czechia, data only contains dwellings provided by the central government.

11. For Colombia, data only refers to social rental housing produced since 2019 in the semillero de propietarios programme.

Source: OECD Questionnaire on Social and Affordable Housing (QuASH) 2023, 2021, 2019 and 2016; Institut Bruxellois de Statistique et d'Analyse (2019); (Korea) Korean Statistical Information Service (2020); (New Zealand)

Ministry of Housing and Urban Development New Zealand (2021); (Italy) data from Federcasa and the Tax Revenue Agency, based on OECD exchanges with the Bank of Italy, July 2023.

## Data and comparability issues

The relative size of the social rental sector was calculated on the basis of the overall number of dwellings in each tenure (owner-occupied dwellings, market-rented dwellings, co-operative dwellings, social rental dwellings, others), as collected from governments in the OECD 2023 Questionnaire on Affordable and Social Housing (QuASH 2023). There are significant gaps in the information gathered, which does not allow for inclusion of all countries. Differences in the years of reference for information across countries constitute an additional limitation.

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