The post-neoliberalization of the Dutch regional housing market

Have policy reforms in the 2020s led to a paradigm shift from neoliberal to post-neoliberal housing market in the Netherlands?

Jasper Blaauw, S7137508

Supervisor D. Bossuyt | June 2025 | Master Spatial Planning
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Utrecht University

Summary

Since 2022, after decades of neoliberalization, the national government of the Netherlands is trying to regain a more active role on the housing market, which is known as post-neoliberalization. However, despite the claims of the national government to be making a 'post-neoliberal' turn with new national and regional housing policy, earlier conducted research fail to answer the question whether these new instruments actually represent a shift away from the neoliberal markets steering logic of recent decades. In order to fill in the existing gap between the limited academic research and the current situation about the role and cooperation of (semi-)government bodies at a regional scale, this research investigates the extent to which the Dutch regional housing market, with a focus on the Metropolitan Region Eindhoven (MRE), has shifted in a post-neoliberal direction in the 2020s.

The main research question is: *To what extent has the Dutch regional housing market, with a focus on the Metropolitan Region Eindhoven, developed in a post-neoliberal direction during the 2020s?* To answer this question, three sub-questions were formulated that analyze: (1) how post-neoliberal housing policy can be defined, (2) how Dutch housing policy has changed in recent years, and (3) how these changes are reflected in regional housing outcomes. The research objectives were to examine recent national and regional housing policy developments and assess whether these represent a shift from neoliberal governance logics towards more publicly steered and socially oriented approaches.

The research applied a qualitative case study design, combining document analysis with nine semi-structured interviews with representatives of municipalities and housing corporations in the MRE. This empirical approach allowed for a detailed analysis of both policy discourse and implementation practices, as well as how actors perceive recent changes in housing governance. The document analysis showed that post-neoliberal housing policy is characterized by a renewed emphasis on affordability, decommodification and democratization (Kadi et al., 2021). Together with the paradigm-shift framework from Hall (1993), which provides a framework to identify a third order policy change, it formed the theoretical basis of this research.

The results show that the Dutch regional housing market, and specifically the MRE, is showing meaningful progress towards a post-neoliberal housing market. The combination of stronger national coordination, regional cooperation, and targeted efforts to improve affordability and democratization, highlights the effort of the (semi-)public sector to take a more active role on the housing market. However, the decades of neoliberalization prior to 2022 have led to several systematic barriers, such as legal constraints for housing corporations, limited municipal capacity, and the persistence of horizontal governance. Consequently, these barriers are hindering a full paradigm shift as described by Hall's (1993) third-order policy change.

As such, the national government should focus on solving the manifests of their neoliberal housing policy of the past decades, which should give municipalities and housing corporations more legal and financial possibilities to fulfill the quantitative and qualitative housing ambitions and to reach a full paradigm shift.

Table of Contents

1. Introduction

1.1. Background

Global research about demographic changes in relation to the housing market have been conducted for over 35 years (Mankiw & Weil, 1989). On a Dutch national scale this has also been a topic of interest, where research on the demographic changes has been conducted since the beginning of the 2000s. As a result, the main demographic trends have been clear for over two decades (Beets & Van Nimwegen, 2000; Wrr, 1993). These results state that the average age and number of households will increase, whereas simultaneously the average household size will decrease. As a result, the Dutch government was aware that the quantitative demand, which is based on the (growth) of the number of households, as well as the qualitative demand, which is based on the (change of) household characteristics, would significantly change over time.

Despite the importance of this finding, the Dutch government did not take its responsibility to implement this in national policy. In fact, the exact opposite played out. Since the 1980s, the national government slowly withdrew from spatial planning and the housing market, resulting in the decentralization and privatization of this sector (Roodbol-Mekkes & Van Den Brink, 2015).This process, which is defined as ‘neoliberalization’ of the housing market, even accelerated in 2008 as a result of the Dutch financial crisis (Van Gent & Hochstenbach, 2019).

Despite the good intentions behind the privatization of the housing sector, recent studies point out that the overall housing shortage in the Netherlands has increased over the last decades (ABF, 2021). According to the latest report of ABF (2021), the housing shortage is estimated to be 297.000. In combination with an estimated growth of 849.000 households, a total of 1.116.000 houses need to be added in the Netherlands until 2035 (ABF, 2021). In order to meet this target and solve the urgent housing shortage, the national government is attempting to regain a more active role in the Dutch housing market. In academic terms, this shift away from neoliberal practices is known as ‘post-neoliberalization (Kadi & Ronald, 2014). As a result, the national government launched the national housing and construction agenda, which provides six sub-agendas, among others the program housing construction (BZK, 2023). The main target of this sub-agenda is to build 900.000 houses in the period between 2022 and 2030 in the Netherlands.

On a regional scale, the national government of the Netherlands obliged every region in the Netherlands to agree on quantitative and qualitative ambitions for the relevant region, in order to meet this national housing target and to regain a more active role in the Dutch housing market. The document in which these agreements are formulated is known as the “regionale Woondeal”, which is freely translated and referred to as “housing deal”, and has been closed in every region of the Netherlands in 2023 (BZK, 2023). With these regional agreements, the national government attempts to improve the interconnectedness and cooperation of government bodies, which should lead to the acceleration of regional housing production, which is required to meet the national housing targets (BZK, 2023).

1.2. Problem statement

Over the last few decades, the national government of the Netherlands has slowly withdrawn from spatial planning and the housing market (Roodbol-Mekkes & Van Den Brink, 2015), resulting in the shortage of 297.000 houses in the Netherlands. In reaction to these negative developments in the Dutch housing market, the national government created the program housing construction (BZK, 2023), which obliged every region to formulate and agree on regional housing ambitions. With this program, the Dutch government tries to regain a more active role in the housing market, through improving the interconnectedness and cooperation of smaller scale government bodies, which eventually should lead to the development of 981.000 houses in the period between 2022 and 2030.

Although the national government claims to be making a 'post-neoliberal' turn with the Housing Deals, the question is whether these new instruments actually represent a shift away from the neoliberal markets steering logic of recent decades. Due to the fact that this regional policy has only been introduced in 2023, one year prior to the start of this research, prior academic researches fail to provide enough relevant data to answer this question.

1.3. Research questions and objectives

The main research goal of this research is to identify a possible policy shift, on national and regional level, since the recent housing policy reforms in the 2020s. In order to reach this goal, the following two research objectives have been formulated

1. **To identify to which extent national and regional housing policy shifted from neoliberal to post-neoliberal**
2. **To identify to which extent regional housing outcomes shifted from neoliberal to post-neoliberal**

To fulfil these research objectives, the following main research question is formulated:
To what extent did the Dutch regional housing market undergo a shift in post-neoliberal direction in the 2020s?

To answer this main research question, three additional research questions have been formulated:

1. What are the characteristics of a paradigm shift into post-neoliberal housing policy?

2. How did Dutch national and regional housing policy change in the 2020s?

3. How do recent policy reforms influence regional housing outcomes?

1.4. Operationalization

In order to understand the relation between the research objectives and research questions, this paragraph will provide an operationalization of these two components, in addition with the type of research question (theoretical or empirical), and the method used. A key feature of this research is the gradual shift from theory to practice in both the research objectives and research questions. In addition to that, the scale level progressively increases throughout the research, beginning on a national scale and ending on a regional scale.

Another key feature is the fact that research question one provides the theoretical basis for the rest of this research, consisting of research question two and three. Research objective one will be reached by answering theoretical question one and empirical research question two. While in both cases, the data will be collected using a document analysis. The data for research question one will be provided in the theory chapter, while the data for research question two will be provided in the results chapter. Research question three will be answered through interviews, which will be further explained in chapter 3.3.

Research objective	**Research question**	**Type**	**Method**
(1) Shift in national and regional policy	(1) What are characteristics of a paradigm shift into post-neoliberalization?	Theoretical	Document analysis
	(2) How did national and regional policy change in the 2020s?	Empirical	Document analysis
(2) Shift in regional housing outcomes	(3) How do recent policy reforms influence regional housing outcomes?	Empirical	Interviews

Table 1: Operationalization of the research objectives and questions (own table)

1.5. Societal relevance

As described in the background and problem statement of this research, the Netherlands is in desperate need for more and the right type of houses (BZK, 2023. In order to tackle this problem, the national government launched the national housing and construction agenda (BZK, 2023), which was translated at a regional scale in the regional Housing deals (BZK, 2023). Despite the positive intention of the national government, significant policy changes don't guarantee the desired physical outcomes. However, whether the Housing deal will result in the physical ambition of building 981.000 houses before 2030 is difficult to conclude at this moment in time. This is due to the fact that the effectiveness of housing policies, which include quantitative housing targets, depend on multiple factors (Buitelaar & de Kam, 2009). These include setting realistic goals, a local authority that acts accordingly and the governance structures (Buitelaar & de Kam, 2009).

By evaluating the short term effects on the regional housing outcomes, potential implications for the long term ambitions could become more clear. As a result, potential barriers and facilitators can be identified, which potentially helps identifying effective strategies to meet quantitative housing ambitions, as described in the research of Buitelaar & de Kam (2009). This directly impacts the quality of life of citizens living in this region.

1.6. Scientific relevance

The Dutch housing market, and in particular the governance structures, has been a topic of interest among multiple academic researchers (Buitelaar & de Kam, 2009; Jonkman et al., 2022, Tasan-Kok et al., 2019). Over the past few decades, these researches have contributed to new insights and a better understanding of the Dutch housing market. An example is the research conducted by Tasan-Kok et al. (2019), which stated that the governance strategies and public accountability among stakeholders have been constantly changing over the last three decades. This has led to entrepreneurial urban governance structures and market-oriented regulatory restructuring, depicting a significant deficit with respect to public accountability (Swyngedouw et al., 2002). As a result, there is less focus on mechanisms that prevent the sacrifice of public services, for the sake of private sector profits (Forrer et al., 2010).

These market changes and their implications have not remained unnoticed by the national policy makers. As a result, housing policies have reformed on a national and regional level, which includes ambitions on a physical and non-physical level (BZK, 2023). These new policy goals are reflected in the design of governance structures and public accountability arrangements (Skelcher et al., 2005). With the implementation of the regional Housing deal, policy makers desire to change the governance structures and public accountability arrangements from a market driven to a more government driven housing market. Because the housing deal has been implemented in 2023, limited academic research has been conducted on the corresponding change in governance structures and public accountability in the Netherlands.

In addition to the desired change in the role of government bodies, the Housing deal also obliges cooperation among these stakeholders in every single region of the Netherlands. Earlier conducted research indicates that regional cooperation is not a new concept in the Netherlands (Kang & Groetelaers, 2017; Altes, 2006; Shahab et al., 2020). However, the recent reforms of the scale and structure of regional cooperation, as result of the regional housing deal, are developments that have not been researched yet.

Based on the currently available data, this research aims to fill in the existing gap between the limited academic research and the current situation about the role and cooperation of (semi-)government bodies at a regional scale. This will result in a better understanding of the implications of national housing policy reforms, and in particular its effects on housing outcomes and the housing market.

1.7. Report structure

The report is structured in six chapters, which will be explained below.

The **first** chapter introduces the research problem by clarifying the research goal, research objectives, research questions, the case study selection, the societal and scientific relevance of the study. The first chapter ends with the report structure and an overview of the thesis outline.

In the **second** chapter a document analysis will be described, as well as the theoretical background and framework of this research.

In the **third** chapter the methodological approach of this research will be described. This consists of the data collection methods, processing methods and analysis methods.

In the **fourth** chapter the results from the empirical research will be presented.

The **fifth** chapter provides a discussion of the results.

The **sixth** chapter is the conclusion of this research, which aims to answer the main research question.

Finally, the research will end with a reflection.

2. Theory

2.1. (Post-)neoliberal housing policy

In the 1970s, *neoliberalism* became the dominant market-based policy structure, that can occur across various scales and in different contexts, like for instance economic, political or social context (cf. Peck, Theodore & Brenner, 2010). In the context of urban development, neoliberal housing policies are characterized by three general traits, which include the *commodification* of housing segments, the *reduced affordability* of housing and the *privatization* of governance structures (Kadi et al., 2021). Over the past few decades, this policy shift and in particular its effects, have been examined in multiple academic researches (Boelhouwer, 2019; Hochstenbach, 2022; Hochstenbach & Arundel, 2019; Jacobs, 2019). In general, these researches conclude that the liberalization of the housing market has led to more social-spatial implications, like an increase in social inequality. In reaction to this neoliberal movement and its (negative) effects, post-neoliberal housing policies represent a shift away from neoliberal practices, by proposing alternatives to market-based policies (Kadi & Ronald, 2014).

2.1.1. Paradigm shift framework

A general framework that can be used to identify a shift in policy paradigm on a national scale, is the framework which was created by Peter Hall in 1993. Within this framework, three ‘orders’ of policy change are distinguished, including first, second and third order policy change. All three ‘orders’ occur at different frequencies and have different impacts. Of the three orders, first order changes occur most frequently and have the least impact on society. In contrast to first order changes, third order changes occur the least amount of time and have the most radical impact on society. According to Hall (1993), paradigm shifts are characterized by third order changes, under the condition of an accompanied change in ‘hierarchy of goals behind policy’.

First order policy change

First order policy changes entail a change in ‘setting’ or ‘level’ of a basic instrument (Hall, 1993), like for instance a change in the amount of income tax. Compared to the other three orders of policy change, first order policy changes occur most frequently and have an relatively low impact (Hall, 1993).

Second order policy change

Second order policy change results in the introduction or change of the basic instruments, without radically changing the hierarchy of ambitions behind policy (Hall, 1993). This kind of change occurs less often than first order policy changes and more often than third policy changes (Hall, 1993).

In the context of the Dutch housing policy, second order policy change occurred multiple times in history, for instance in the period between 1989 and 2000 (Panneman, 2019). In this period, the Dutch government abolished rent controls for dwellings above the 'liberalization limit' and stopped granting subsidies to housing associations (Panneman, 2019).

Third order policy change

Third order policy change refers to a radical change in policy, which occurs least frequently out of the three orders of change (Hall, 1993). Only when a third order policy change is accompanied and based on a national change in the hierarchy of goals, one can speak of a 'paradigm shift' (Hall, 1993).

According to Panneman (2019), this paradigm shift with respect to housing policy, occurred in the Netherlands during the late 1980s and 1990s. This shift to a neoliberalized housing policy were based on the new goals and policy principles which were introduced in this period (Panneman, 2019).

2.1.2. Post-neoliberalization framework

In order to identify post-neoliberal housing policies, Kadi et al. (2021) developed an analytical framework which is based on three criteria, consisting of *affordability*, *democratization* and *decommodification* of housing. These three variables can operate interdependent and independent from each other (Kadi et al., 2021). However, in order for a policy paradigm to genuinely be considered as post-neoliberal, a shift in all variables need to occur (Kadi et al., 2021). All three variables will be further explained below.

Affordability

The reduced affordability of housing for low- and middle-income groups can be seen as an intentional goal or indirect effect of neo-liberal housing policies (Kadi & Ronald, 2016; Goetz, 2013). Consequently, a post-neoliberal approach intends to deepen housing affordability for lower- and middle-income groups, through additional public housing or instruments like rent regulation (Kadi et al., 2021).

Decommodification

Post-neoliberal housing policies are partly characterized by the decommodification of houses or housing segments. With decommodification, Kadi et al. (2021) refers to the process in which financialized or privatized housing actors are driven away by non-market actors. This can be achieved through the implementation of instruments like subsidy programs, re-municipalisation or state-led policies and initiatives or instruments (Kadi et al., 2021).

Democratization

The third and final characteristic of post-neoliberal housing policies is the democratization of housing markets and processes (Kadi et al., 2021). This specifically relates to the power

relations in planning procedures and housing predictions, which can be translated in to the governance structure. A democratized form of governance, includes a more powerful role for (public) organizations or groups that represent low- and middle-class groups, and a less powerful role for private organizations (Kadi et al., 2021).

2.2. Regional housing policy

Within the context of urban planning, housing policies and ambitions are often formulated on a regional scale (Skelcher, 2005; Walsh, 2012; Berisha & Cotella, 2021, Raynor & Whitzman, 2020). This is due to the fact that shared (regional) agenda's build up consensus, capacity and competency around shared definitions of needs and the mechanisms or instruments to meet those needs (Raynor & Whitzman 2020). Despite the existence of a shared agenda, the regional governance strategies are not always effective. This was concluded in the research from Walsh (2012), which shows that regional governance strategies can sometimes lack conformance, due to the absence of legal requirements for local authorities to consistently implement these strategies.

Before 2021, the Dutch national government had been somewhat reluctant to introduce regional housing policies, because of the belief that it complicates existing policy instruments and would lead to discussion about the borders (Boelhouwer, 2019). With the introduction of the program housing construction and the regional Housing deals, the national government shifted from this view (BZK, 2023).

Due to the recent implementation of mandatory regional housing policy in the Netherlands, limited research has been conducted on this topic. One such study is the academic paper authored by Mangnus (2021), which investigates the implications of the Housing deal in the Arnhem-Nijmegen region. An important finding of this paper is the observation that private companies are under the impression that short-term quantitative ambitions are negatively impacted by qualitative restrictions, like for instance the ladder for sustainable urbanization (Mangnus, 2021).

2.3. Public accountability and governance strategies

In order to better understand the variable 'democratization', this research will use two additional variables, which help us to identify and understand the form of governance. These two variables are 'public accountability' and 'governance strategies' and were previously used in a research by Kang and Groetelaers (2017). The term accountability, refers to the process in which diverse safeguarding mechanisms are created, to prevent the private sector from profiting at the expense of public services (Forrer et al., 2010). Governance strategies define public goals or interest and control other stakeholders, in order to achieve these goals (Savani, 2013). In general, three ideal types of 'governance strategies' can be distinguished, namely a hierarchical strategy, market strategy and relational or horizontal strategy (Buitelaar et al., 2006; Buitelaar & de Kam, 2009; Kang and Groetelaers, 2017). The

concept of accountability and the three governance strategies will be further explained in the paragraphs below.

2.3.1. Accountability

The concept of accountability has been defined and explained in multiple academic researches (Mulgan, 1997; Bovens et al., 2010; Kang & Groetelaars, 2017). One of these studies define this concept as “the ability to explain or give an account of one's actions to another interested party” (Kang & Groetelaers, 2017). This research will specifically focus on public accountability, which refers to the process where diverse safeguarding mechanisms are created, to prevent the private sector from profiting at the expense of public services (Forrer et al., 2010). Multiple researches describe public accountability as a ‘social relationship’ between an *accounter* and an *accountee* (Bovens, 2007). The term accounter is used for the actor that feels a responsibility and obligation to prevent a service to an accountee. Within the context of urban planning, the chain of social relationships between public and private sectors and citizens, are described by Tasan-Kok et al. (2019). Within this scientific paper, the researchers state that in an era of modern governance, the public sector operates as an accounter and accountee. This can be visualized in the figure below.

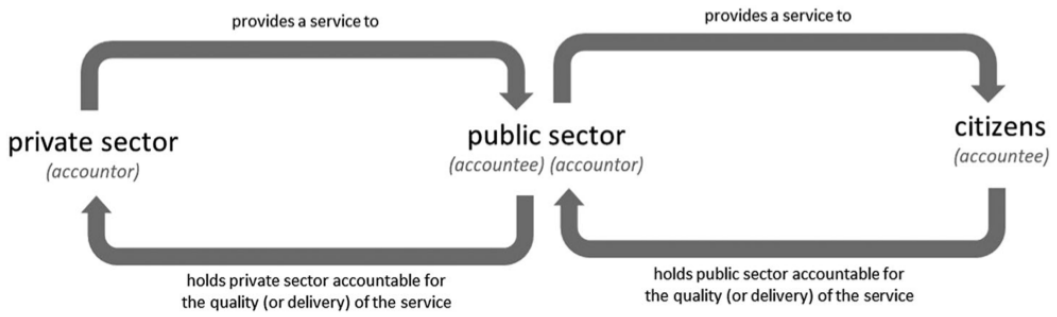

Figure 1: the relationship between the private sector, public sector and citizens (Tasan-Kok et al., 2019)

In the context of Dutch urban development, accountability mechanisms have been shifting over time, from a top-down to a bottom-up approach (Tasan-Kok et al., 2019). This is partly a result of the changing form of governance, which diminishes the accountability of the public sector and emphasizes an urban planning process based on contractual relations and negotiation. In modern governance the private sector is held accountable to deliver services or goods, which the public sector defines in contracts and subsequently tries to monitor and control (Dubnick & Frederickson, 2011). As a result this structure ensures that public sectors can more easily control their defined goals. However, due to the extensive tasks and duties, overall responsibilities and public goals are more difficult to comprehend, leading to a disordered situation for local governments (Tasan-Kok et al., 2019).
Accountability relationships do not only occur *between* individual sectors, but also *within* an individual sector. In the context of Dutch urban development, the accountability relationships between different government bodies play an important role (Tasan-Kok et al., 2019). Research by Kang and Groetelaers (2017), successfully describes the current state of the

Dutch intergovernmental accountability relationships between the province, regional intermunicipal cooperation body and the municipality. In this case, the municipality is accountable to the province, while the regional intermunicipal cooperation body is accountable to the municipality. All the relevant actors within this structure are visualized in the figure below.

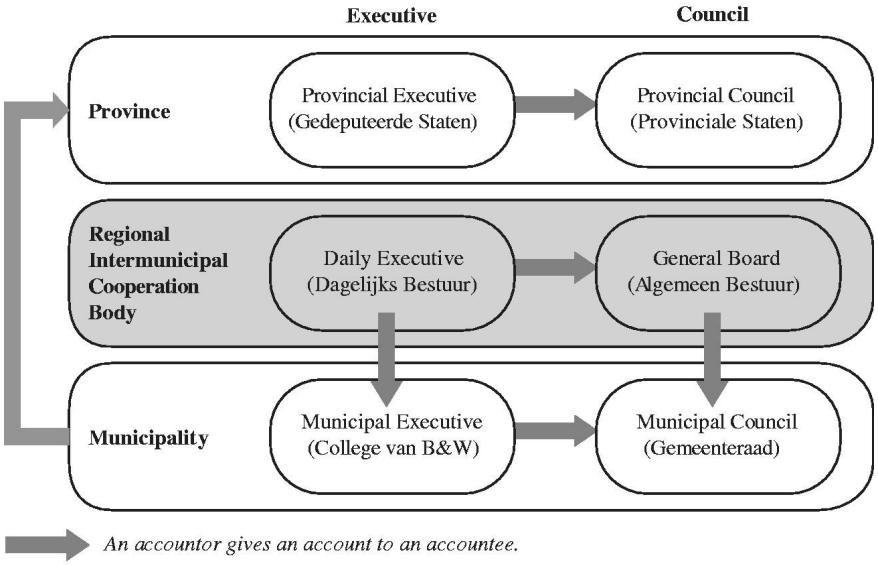

Figure 2: Intergovernmental accountability relationships in the Netherlands (Kang and Groetelaers, 2017)

2.3.2. Hierarchical governance strategies

With a hierarchical governance strategy, authority is used to influence organizations to act in a desired way (Buitelaar & de Kam, 2009). A distinguishing feature of hierarchies in general is the acceptance of restrictions by the resource owner, in order to use their resources in a desired way. In other words, participants in a hierarchical governance strategy accept the 'control' over their own resources by another stakeholder (Thompson, 1991). This governance strategy does not only occur between organizations, but also within organizations (Buitelaar & de Kam, 2009).

In the Dutch planning context, public organizations can use different instruments and tools within hierarchical governance structures. One of these instruments is a zoning plan. Within a zoning plan, all the planning rules and exceptions for a specific plot are described (Bouwmeester et al., 2023). If the owner of the plot envisions to deviate from the zoning plan, they need to require a permit from the municipality (Bouwmeester et al., 2023). In other words, by the use of zoning plans, the municipality 'controls' the resources of other stakeholders to a certain extent.

2.3.3. Market-oriented governance strategies

Many scientific articles describe the definition and functions of a market (Buitelaar & de Kam, 2009). A commonly used definition is the one from Hodgson (2002), which states that “a market is an institution in which a significant number of commodities of a particular, reasonably well-defined type are regularly exchanged.”

In the context of urban development, land is the ‘commodity’ which is exchanged. However, this term is not applied correctly, because of the fact that every plot of land has its own unique characteristics, resulting in the irreplaceability of the good (Buitelaar & de Kam, 2009). In addition to that, the amount of sellers and buyers is limited, which leads to a situation in which mechanisms like ‘trust’ play an important role (Needham & de Kam, 2004).

2.3.4. Horizontal governance strategies

According to scientists, hierarchical and market-oriented governance strategies do not cover the diversity of existing governance structures (Buitelaar et al., 2006). In order to do so (at least) a third governance strategy is needed. This third strategy, better known as a horizontal governance strategy, was first realized and appreciated by scientists in the 1980s (Buitelaar & de Kam, 2009). This strategy is characterized by the importance and use of ‘networks’ (Buitelaar & de Kam, 2009), which are arrangements between multiple organizations that are involved in a long-term relationship (Thorelli, 1986).

Network structures can be found in different agreements which are related to Dutch housing development (Buitelaar & de Kam, 2009). This is for instance the case with intention agreements that are reached between key stakeholders in the early stage of a development plan. But also the performance agreements, which are conducted on a yearly basis between the municipality and the housing association.

2.4 Conceptual framework

To visualize the influence of national and regional housing policy on the neoliberalization of the housing market, a conceptual framework has been developed, as shown in figure 3. This conceptual framework is based on the theoretical concepts that have been explained in this chapter. In summary, this framework shows that a paradigm shift on a national level affect housing policies on a regional level. Policies on both the regional and national level influence regional housing outcomes, which eventually results in the post-neoliberalization of the regional housing market. In the context of this research, the national housing and construction agenda (national policy), resulted in the development of the regional Housing deal Southeast-Brabant (regional policy). To investigate whether the development of both policy documents eventually led to the post-neoliberalization of the regional housing market of the MRE, three dimensions will be researched. These consist of affordability, decommodification and democratization.

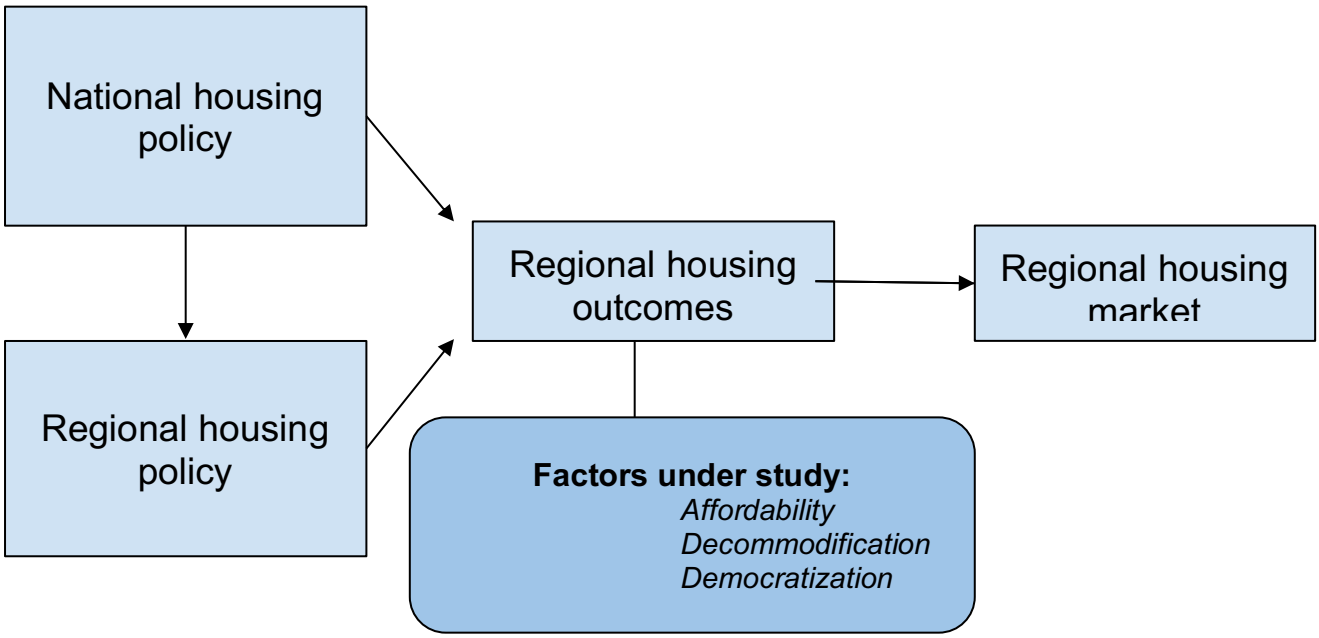

Figure 3: conceptual framework (own figure)

3. Methods

3.1. Case study

In order to answer the main research question “To what extent did the Dutch regional housing market undergo a shift in post-neoliberal direction in the 2020s?” and to fulfil the two research objectives, this research will apply a qualitative research method, which will be a case study research approach. According to Swanborn (2010) an intensive research approach, like a case study, helps to describe and explain possible changes and complex structures of phenomena. This matches the research goal of this research, which aims to identify to which extent housing policy (a complex phenomenon) has changed since the 2020s.

3.2. Case selection

A necessary process in a case study is the selection of a case. According to Gerring (2007) there are nine techniques to conduct this process, which all represent a case study type. Within this research, a typical-case approach has been selected, because of its ability to provide an insight of a complex and broader phenomenon, using a case that represents a typical set of values (Gerring, 2007). The typical case in this research is the Metropolitan Region Eindhoven (MRE), as it is one of the 35 regions of the Netherlands that developed and agreed on regional housing ambitions, in the form of the Housing deal Zuidoost-Brabant, in 2023 (“Regionale Housing deal Zuidoost-Brabant”, 2023).

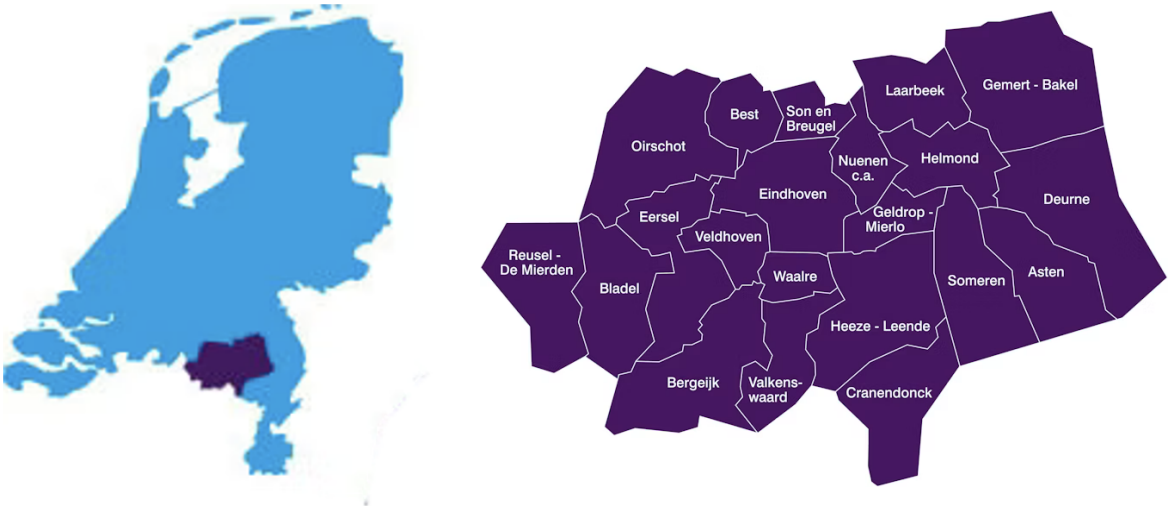

Figure 4: Metropolitan Region Eindhoven (MRE, 2024)

The MRE, which is otherwise known as Southeast-Brabant or the Brainport region, consists of 21 municipalities, which are divided among the four sub regions (SGE, A2-gemeenten, de Kempen, de Peel) (MRE, 2024). The region is considered to be an innovative region, due to its ecosystem of high tech companies that are located there (Brainport, n.d.). Due to the expected economic growth of the region, household trends forecast a steady growth over the next fifteen years (Provincie Noord-Brabant, 2023). This aligns with the national household expectations, which form the base for the national program housing construction (BZK, 2023). Expected household and economic growth have been translated into the ambitious quantitative housing target of 45.135 houses in the period between 2022 and 2030 ("Regionale Housing deal Zuidoost-Brabant", 2023). The yearly housing targets, spread across the housing segments, are displayed in the table below

Tabel 1b: Regionale opgave per jaar

Jaartal	Bruto nieuwbouw opgave	Netto toe te voegen aan de woning-voorraad	Beschikbare plancapaciteit (aantal woningen)	Aantal woningen in harde plancapaciteit	Opgave betaalbaarheid (netto)		
					Sociale huur 30%	Middenhuur 16%	Betaalbare koop 20%
2022	4.230	3.875	8.360	4.635	1.165	645	775
2023	3.515	3.160	8.360	4.635	950	525	630
2024	5.430	5.190	8.360	4.635	1.555	865	1.040
2025	5.435	5.190	8.360	4.635	1.555	865	1.040
2026	5.380	5.135	8.360	4.635	1.540	855	1.025
2027	5.220	4.985	4.015	625	1.495	830	995
2028	5.145	4.915	4.015	625	1.475	820	985
2029	4.980	4.750	4.015	620	1.425	790	950
2030	4.970	4.785	4.015	620	1.435	800	955
Totaal	**45.130**	**41.985**	**57.870**	**25.660**	**12.595**	**6.995**	**8.395**

NB: De aantallen zijn afgerond op vijftallen. Daardoor kunnen afrondingsverschillen ontstaan.

Table 2: Housing targets and segments MRE ("Regionale Housing deal Zuidoost-Brabant", 2023)

3.3. Data collection

3.3.1. Document analysis

The first qualitative method that has been used in this case study is document analysis. Document analysis is an appropriate method for qualitative case-studies (Stake, 1995), as relevant and available documents can be systematically evaluated or reviewed in order to provide necessary background information and context (Bowen, 2009). Advantages of this method are its efficiency and availability, as literature is often publicly available and less time-consuming to collect compared to other methods (Bowen, 2009).

In this (evaluative) research document analysis will firstly contribute by providing necessary background information and shaping the right context for the reader. Secondly, it aims to define indicators that enable this research to evaluate the theory of change, which are translated into key evaluation questions (KEQs) (Peersman, 2014). In this research, theoretical research question one “what are the characteristics of a paradigm shift into post-neoliberal housing policy?”, aims to identify these indicators, and has been answered through document analysis in the theory chapter of this research. In addition to that, empirical research question two “how did Dutch national and regional housing policy change in the 2020s?” will be primarily answered through the document analysis in the result chapter of this research. This document analysis will consist of a historical overview of the Dutch housing market and the analysis of a number of housing policy documents, including the national housing and construction agenda, the regional housing deal Southeast-Brabant and the development strategy Southeast-Brabant.

3.3.2. Semi-structured interviews

The second qualitative research method of this study is semi-structured interviews. According to Peersman (2014), interviews are a suitable data collection method for evaluative research as they allow the researcher to collect the necessary data to make judgements on a policy or program. Subsequently, the interviews will be semi-structured, as this technique allows the researcher to ask a number of predetermined questions without denying the possibility to ask additional questions (Boeije, 2009). As a result, this method leaves room to gain additional information and deeper insights in this topic (Boeije, 2009).

In this research, semi-structured interviews will be used to answer the KEQs that have been developed based on research question one and two in the executed document analysis. In this case, the three indicators that identify a shift from neoliberalization to post-neoliberalization consist of *affordability*, *decommodification* and *democratization* (Kadi et al, 2021). These indicators have been translated into KEQs, which constitute the basis of research question three “How do recent policy reforms influence the regional housing outcomes?”.

The interview guide of this research was developed based on the interview guide design from Hennink et al. (2020), consisting of an introduction, opening questions, key questions and closing question. The opening questions follow the introduction and aim to let the

interviewee feel comfortable. Subsequently, the key questions are used to collect core data to answer the research questions. Lastly, the closing questions of the interview aim to create distance between the interviewee and interviewer, before the interview is ended.

3.4. Data processing

Prior to the interviews, all interviewees were asked for their permission to record the interviews. All respondents gave their permission, which consequently led to the recording and transcribing of every interview. In order to analyse and clarify the extended amount of information that forms the transcripts, all transcripts were coded using Atlas.TI. By coding the transcripts, individuals or groups of words are systematically organized and labelled to identify meaningful information, themes or patterns (Baarda et al., 2020).

Subsequently to coding and analysing the interviews, quotes were selected and translated due to the fact that all interviews were conducted in Dutch. Interviewees that requested to receive the utilized quotes, which was asked prior to the interview, were sent the quotes by email. As a result, the misinterpretation of data is prevented as much as possible.

3.5. Interviewees

In total nine interviews have been conducted. These consist of six interviews with representatives of municipalities and three interviews with representatives of housing corporations that are active in the MRE.

Out of the nine interviews, six interviews will be conducted among municipalities that are located in the MRE. The selected number of interviews allows this research to conduct an interview with at least one municipality from every sub-region, and in two sub-regions even two interviews. From every sub-region, a random municipality has been selected to be interviewed and the sub-regions SGE and de Kempen have been selected to be interviewed twice. This choice has been made based on their characteristics. The SGE is considered to be an urban sub-region, whereas de Kempen is considered to be a rural sub-region. Until this point the data does not suggest any differences among the four sub-regions. However, by interviewing a municipality from every sub-region, and by looking at the SGE and de Kempen in more detail, this can be formally excluded. The participants are the municipalities of Helmond, Eindhoven, Heeze-Leende, Bergeijk, Deurne and Eersel. From these municipalities, the housing policy makers will be interviewed. These people are locally involved in the monitoring of housing projects and the development of housing policy. On a (sub)regional scale, these people are present at the subregional and regional consultations, in which housing policy is being aligned and monitored. Because of their presence at these consultations, their email addresses were registered, which made it possible to contact them.

The final three interviews will be conducted among housing corporations that are active in the MRE. Out of the 13 housing associations that have signed the Housing deal Zuidoost-

Brabant, three have been randomly selected. The selected housing corporations are WoCom, Woonpartners and Compaen. From every housing association, a real estate manager will be interviewed because of the practical experience that this person should have with the development of social houses in the region. In the context of this research, this person should be able to notice and mention the changes that have occurred over the last three years. Eventually, the interviews were all arranged by email.

All the organizations and municipalities, their position and the date and length of the interviews are listed in table 3. For privacy reasons, the names of the respondents will not be mentioned, instead they will be named after their organization or municipality. All the interviews have been conducted in digital meetings.

Organization/municipality	Position	Date	Length
Bergeijk	Housing policymaker	19-03-2025	45:47
Deurne	Housing policymaker	06-03-2025	33:58
Eindhoven	Housing policymaker	12-03-2025	36:21
Eersel	Housing policymaker	21-02-2025	42:12
Heeze Leende	Housing policymaker	06-03-2025	31:53
Helmond	Housing policymaker	05-03-2025	48:27
Woonbedrijf	Real estate manager	22-03-2025	30:59
Woonpartners	Real estate manager	05-03-2025	34:39
WoCom	Real estate manager	24-02-2025	43:53

Table 3: Overview interviewees and interviews

3.6. Reliability and validity

To ensure the quality of the data and subsequent results, the reliability and validity of a research are of significant importance (Quintão et al., 2020).

The reliability of a research is related to the ability to replicate the results of the study. A research is considered to be reliable, if a future investigator can follow the same procedures as described in the original research and the results match to each other (Boeije, 2009). To develop a reliable research, the data collection method should be designed and standardized to minimize its sensibility of errors and biases (Boeije, 2009). Within this research semi-structured interviews are the selected data method selection. This method contributes to the reliability of this research, as the main research questions have been developed in advance of the interviews and were integrated in the interview guide. The interview guide can be found in attachment A. Another aspect that is related to the interviews and contributes to the reliability of this research is the ability for the interviewees to receive the utilized quotes. As a result, the misinterpretation of data is prevented as much as possible.

The validity of a research is related to the interpretation of data and the prevention of systemic mistakes in the data collection process (Boeije, 2009). In other words, validity ensures that data measures what it intends to measure (Peersman, 2014). An important factor that potentially could influence the validity of a research is the researcher itself (Boeije, 2009). This results from the theoretical and personal perspective of the researcher that could potentially influence the interviews and subsequently the outcomes of a research. Consequently, to ensure the validity of this research, the researcher should continuously reflect on their personal role and minimize its influence on the interviewees. In addition to the position of the interviewer, the number of interviews also contributes to the validity (Boeije, 2009). Typically, a researcher should aim for data saturation, which is considered to be the point in which no new insights or information emerges from additional interviews (Boeije, 2009). Within this research, data saturation is reached after 10 interviews, including 6 interviews with municipalities, three interviews with housing corporations and one interview with the MRE.

In order to ensure both the validity and reliability, the triangulation of data collection methods has been applied in this research. Triangulation involves the process in which multiple data collection methods are applied (Boeije, 2009). In the context of this research, both a document analysis and semi-structured interviews were applied to collect data and subsequently answer the research questions. As explained in paragraph 3.3, the document analysis provided the theoretical background and context needed to formulate the KEQs. The KEQs subsequently formed the foundation of the interview guide and ensures that the collected data is sufficient to answer the main research question.

4. Results

In this chapter, the collected data from the document analyses and the interviews will be analysed and represented in a logical and precise way. The structure of this chapter is based on the two research goals and the unanswered (empirical) research questions two and three. Out of the two research questions, research question two will be answered through a document analysis, while research question three will primarily be answered through data that has been collected by the conducted interviews. The three dimensions that are used to answer research question three are affordability, decommodification and democratization. These dimensions were translated into individual KEQs, which will be answered and discussed using the collected data from municipalities and housing corporations.

4.1. National and regional housing policy

In order to reach research objective 1 and answer research question two “how did Dutch national and regional housing policy change in the 2020s?”, it is important to understand the historical context of the Dutch housing market and its policy. This paragraph will give a summary of the most important principles and developments in relation to the Dutch (public) housing policy, which occurred in the decades and centuries prior to this research. At the end of this chapter, relevant national and regional housing policies will be further analysed. These consist of the national housing and construction agenda, the regional housing deal Southeast-Brabant and the development strategy Southeast-Brabant.

4.1.1. The origin of public housing (before the 1980s)

The Dutch system of public housing originates from the 1840s, when growing concerns about the bad living conditions of the factory workers led to the development of ‘housing associations’ (Elsinga & Wassenberg, 2014). These housing associations were funded by the upper class with the goal to provide qualitative acceptable and affordable housing for the growing class of factory workers (Elsinga & Wassenberg, 2014). Apart from the altruistic concern for the factory workers, the upper class also acted out of self interest, because better living conditions resulted in less diseases and absence among the factory workers (Ekkers & Helderman, 2010).

In the beginning of the twentieth century, Dutch governments became a more prominent player in the housing market as a result of the Housing Act of 1901. This act authorized municipalities to provide financial support to non-profit housing associations. Despite this, the national government only played a marginal role in the housing market up until the 1940s (Elsinga & Wassenberg, 2014).

This changed after the Second World War, when building activities and the housing sector became centralized in an attempt to recover the national economy (Ekkers & Helderman, 2010). As a result, housing associations received extensive support from the national government, rent restrictions were introduced and the total supply of socially rented housing was expanding up until the 1980s (Ekkers & Helderman, 2010).

4.1.2. (Neo)liberalization of the housing market (1989-2000s)

In contrast to most other western European countries, which shifted to a more privatized housing market in the 1970s, the Netherlands started this movement in the late 1980s and 1990s as a result of the decline in economic growth (Boelhouwer, 2002). In 1989, these macroeconomic conditions eventually led to the publication of the white paper “Public Housing in the Nineties: From Building to Living", which would break the fundamental housing principles of the previous governments by introducing the view that citizens are responsible for their own housing without major government interventions (Boelhouwer, 2002). In 2000, the white paper “People, Wishes, Living: Living in the 21st Century” was published, which adopted the leading principle of ‘individual freedom of choice’, which was firstly introduced in the previous white paper (*Wonen in De 21ste Eeuw*, 2000). In addition to the first white paper, the second white paper admitted that the markets did not function perfectly, and therefore introduced the task for the Dutch government to correct these imperfections in the name of individual freedom of choice (*Wonen in De 21ste Eeuw*, 2000). As a result of these (neo)liberal housing policies, the supply of socially rented housing declined from 43% in 1985 to 37% in 2005 (Elsinga & Wassenberg, 2014).

In 2008 the process of neo-liberalisation further accelerated as a result of the financial crisis (Van Gent & Hochstenbach, 2019). This eventually led to abolishment of the ministry of Housing and Spatial Planning and the implementation of the 2015 Housing Act, which introduced income eligibility rules for the housing association stock (Van Gent & Hochstenbach, 2019). These rules restricted the access to social housing for all non-disadvantaged groups with a higher income than the ruled income limit and pushed yearly additions rent increases for existing tenants with an exceeding income (Van Gent & Hochstenbach, 2019). In the period between 2021 and 2021, these neoliberal policies stimulated housing associations to sell more of their housing stock (Hendriks, 2008).

4.1.3. The housing crises in the 2020s

The introduction of cabinet Rutte IV in 2021, marked a significant change in the role of the Dutch national government in the context of the national housing policy. This can be concluded based on the formulated agreements in the coalition agreement 2021-2025, between the VVD, D66, CDA and the ChristenUnie (“Omzien Naar Elkaar, Vooruitkijken Naar De Toekomst,” 2021). As a result of this agreement, the ministry of Housing and Spatial Planning was re-introduced and the state formulated the ambition of building 100.000 houses, including 66.000 affordable houses, each year (“Omzien Naar Elkaar, Vooruitkijken Naar De Toekomst,” 2021). Another component of this agreement is the ambition to renew the national housing and construction agenda, which was indeed renewed and published in 2022 (BZK, 2022).

4.1.4. National housing and construction agenda

In the introduction of the national housing and construction agenda the writers explain the cause for the occurred housing problems, and subsequently the development of this agenda, as a result of the neoliberalization of the housing market (BZK, 2022). The writers highlight the role of both the (national) government and the private sector by mentioning the following:

> *"'The promotion of adequate housing is a matter of concern for the government.' Provision 2 of Article 22 of the Constitution is clear: housing is a fundamental right and a core responsibility of the government.*
>
> *In recent years, the role of the national government in upholding this fundamental right has been diminished. There has been an overreliance on the assumption that the market would, by itself, provide a solution to the housing crisis. For too long, there has been faith that the sum of all decentralized decisions would lead to a resolution." (BZK, 2022)*

In addition to the problem statement mentioned above , the writers of this agenda conducted an integral analysis which identified three significant problems in relation to the housing market. They include the limited *availability*, *affordability* and *quality* of housing in the Netherlands. These problems are caused by a variety of factors including the demographic developments, lack of government steering, financial circumstances, limited employee capacity and the overflow of various ambitions. As a result, the national housing and construction agenda formulated three objectives that are each related to the earlier identified problems.

The first objective, which is related to *availability* and simultaneously can be considered as the core of this document, is to realise approximately 900,000 additional dwellings by 2030, of which two-thirds are intended to be classified as affordable. This target not only aims to stimulate quantitative expansion but also aspires to improve the qualitative aspects of housing through a more equitable distribution of social rental housing across municipalities. The second objective is to enhance *affordability* by ensuring that housing costs better align with household incomes. The agenda aims to reduce the number of households facing excessive housing expenses and improve access to affordable housing for first-time buyers, middle-income groups, and vulnerable populations. The third and final objective concerns improving housing *quality* with a focus on increasing suitable housing for target groups such as the elderly and low-income households, while enhancing liveability in deprived areas.

In the third chapter of the agenda the defined ambitions are operationalised through a set of interventions, which primarily outline a stronger role for the central government. These interventions are subsequently incorporated in a series of programs and action lines, which are introduced and explained in chapter four. In relation to this research, arguably the most important program is the program housing construction. This program obliges every region in the Netherlands to agree on quantitative and qualitative housing ambitions through the development of regional housing deals. In addition to that, interventions like enforceable performance agreements with housing corporations and financial incentives for affordable housing, reinforce vertical or hierarchical governance strategies as explained by Buitelaar & de Kam (2009) and consequently improve the steering capacity of governments.

Together, these components reflect a clear shift towards a more coordinated and interventionist housing policy. By addressing availability, affordability, and quality at the same time, and linking national goals to binding regional agreements, the National Housing and Construction Agenda marks a step towards post-neoliberal housing governance in the Netherlands. Viewed through Hall's (1993) policy paradigm framework, the agenda signals more than small, technical adjustments. The return of national steering, enforceable agreements, and a stronger focus on housing as a public good suggest changes in both policy tools and institutional arrangements, which align with second-order change. Moreover, the renewed idea that housing is a core government task rather than just a market issue, points to an emerging shift in policy goals and ideas. While it is too early to call this a full paradigm shift, the agenda lays important groundwork for a shift away from neoliberal thinking towards a more state-led and socially focused housing policy. How these plans are implemented in practice will determine whether major change follows.

4.1.5. Regional housing deal

In 2023, as a result of the program housing construction, the national government has made agreements with every housing deal region. The aim is to improve the cooperation between the national government, province, municipality, private sector and housing corporations. Components of these housing deals include a cooperation structure, specific housing development locations and quantitative and qualitative housing ambitions, which cumulatively consist of 936.349 additional dwellings by 2030 (MVRO, 2023). An overview of the 35 housing deal regions and the quantitative ambition per province, is shown in the figure below.

Figure 5: Housing deal regions of the Netherlands (MVRO, 2023)

In the housing region Southeast-Brabant, the regional housing deal was signed on March 9th 2023 by the 21 municipalities, 13 housing corporations, province of North-Brabant and the minister of Housing and Spatial Planning. It aims to address the substantial housing demand resulting from the rapid economic growth in the Brainport Eindhoven region ("Regionale Housing deal Zuidoost-Brabant", 2023). The deal acknowledges the region's need to facilitate a 'schaalsprong', which is freely translated and referred to as the 'scale-up', to support both housing needs and economic development. What this scale-up signifies will be explained and analysed in the next paragraph. Furthermore, the agreement is framed as a long-term partnership among the undersigned parties, which collectively commit to deliver a minimum of 45,130 new dwellings between 2022 and 2030 with an emphasis on steering both the pace and composition of housing production.

A notable aspect of the deal is the introduction of binding housing ambitions per municipality based on the household forecast of the province. In the document this is referred to as the principle of fair share. These regional targets ensure that the negative implications of housing are equitably distributed across urban and rural municipalities, limiting the risk of spatial inequalities. Furthermore, in the second chapter of this deal a list of regionally agreed on strategic large-scale projects are listed, covering 85% of the total housing ambition. This creates a clear implementation agenda, reflecting an increased level of regional coordination and a long-term strategic planning, aligning with the literature on regionalism (Raynor & Whitzman 2020). In the figure below, the strategic projects are visualized.

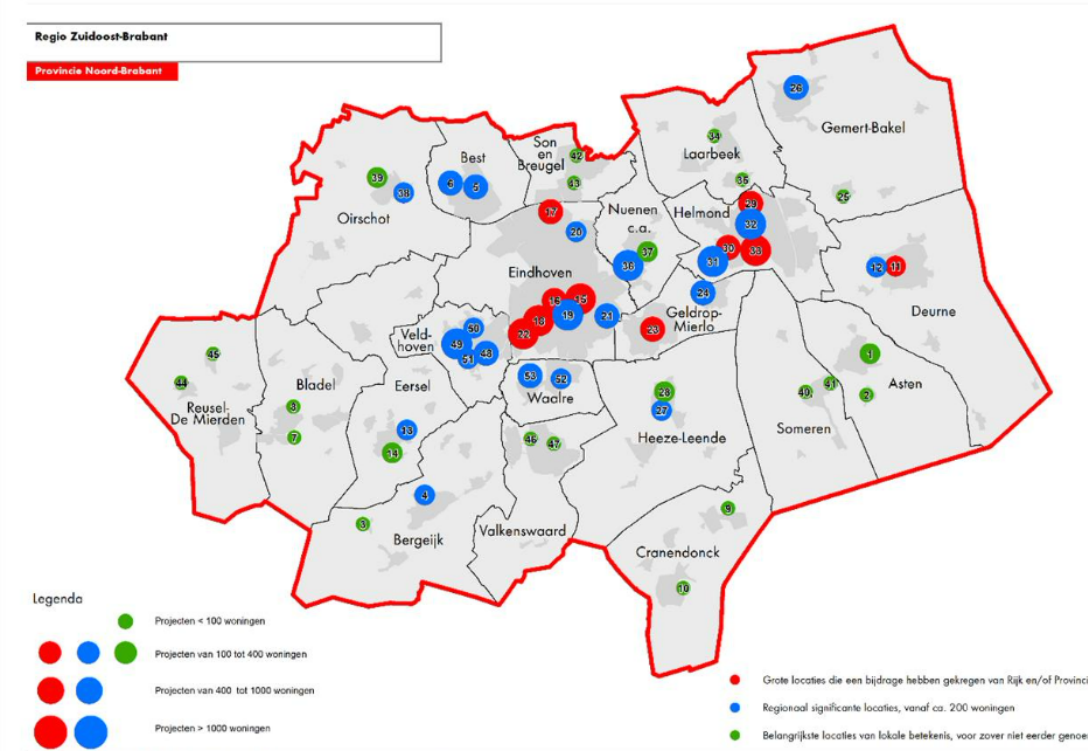

Figure 6: strategic projects housing deal ("Regionale Housing deal Zuidoost-Brabant", 2023)

Another key feature of the deal is the linkage between quantitative targets and affordability ambitions. All parties have committed to ensure that two-thirds of newly developed housing falls within the affordable segment. This includes a minimum of 30% of social rent dwellings and 36% in the middle segment, while the remaining 34% can be realized in the high (expensive) sector. In the housing deal the thirteen housing corporations are responsible to realize the 30% social rent, which accounts for 13.540 dwellings. In addition to that housing corporations expressed the ambition to realize 1.350 middle rent dwellings. Finally, the deal emphasises flexibility and innovation to address short-term housing pressures and long-term demographic change. Agreements on the realisation of temporary flex housing, housing for the elderly, and the application of sustainable building methods, illustrate a wide variety of housing policy objectives beyond quantitative production.

Taken together, the regional housing deal Southeast-Brabant illustrates how national ambitions are translated into a regional governance framework. A key feature of the deal, besides the implementation of vertical steering by the national government, is it also enforces a strong horizontal cooperation. The deal was developed through collaboration between municipalities, the province, housing corporations, rather than the national authorities setting all targets unilaterally. As a result, regional actors collectively agreed on housing goals, key projects, and other relevant aspects. This reflects the characteristics of horizontal governance strategies (Buitelaar & de Kam, 2009), as discussed earlier in this research. Viewed through Hall's (1993) policy paradigm framework, these arrangements suggest a gradual but meaningful second-order shift, in which new policy instruments and institutional arrangements enhance public steering in the housing market.

4.1.6. Development strategy Southeast-Brabant

Five months after signing the regional housing deal all 21 municipalities of the MRE, the province, water boards, and other regional partners, agreed on the "ontwikkelstrategie" Southeast-Brabant, which is freely translated and referred to as the development strategy Southeast-Brabant ("ontwikkelstrategie Zuidoost-Brabant", 2023). In contrast to the housing deal, which includes ambitions for the period between 2022 and 2030, this strategy sets out a long-term regional vision over the subsequent period between 2030 and 2040. Central to this strategy is the concept of the scale-up, which refers to the need for a major spatial, housing, and infrastructure expansion to sustain the region's international economic position. The ambition of this scale-up is to realise approximately 100,000 new dwellings, which accounts for a housing stock increase of 30%, 72,000 additional jobs, and significant improvements in regional mobility, spatial quality, and liveability ("ontwikkelstrategie Zuidoost-Brabant", 2023).

A key component of the strategy is its focus on integrating housing, working environments, and accessibility. In addition to that, the housing development is explicitly framed as "a lever to revitalise and future-proof existing urban and rural areas" ("ontwikkelstrategie Zuidoost-Brabant", 2023). The strategy emphasises urban development, neighbourhood renewal, and housing diversification to meet the needs of an ageing population and to stimulate household mobility. Another important aspect of the development strategy is the idea to specifically focus on development around key regional public transport nodes. The development of

these sub-regional hubs contribute to regional connectivity and reduce car dependence. Out of the interviewed municipalities, Eersel and Deurne were announced as ‘new’ sub-regional hubs, whereas the municipalities of Eindhoven and Helmond already obtained this status in earlier agreed on strategies in the SGE (“ontwikkelstrategie Zuidoost-Brabant”, 2023). A visual presentation of the sub-regional hubs and their interconnectedness is given in the figure below.

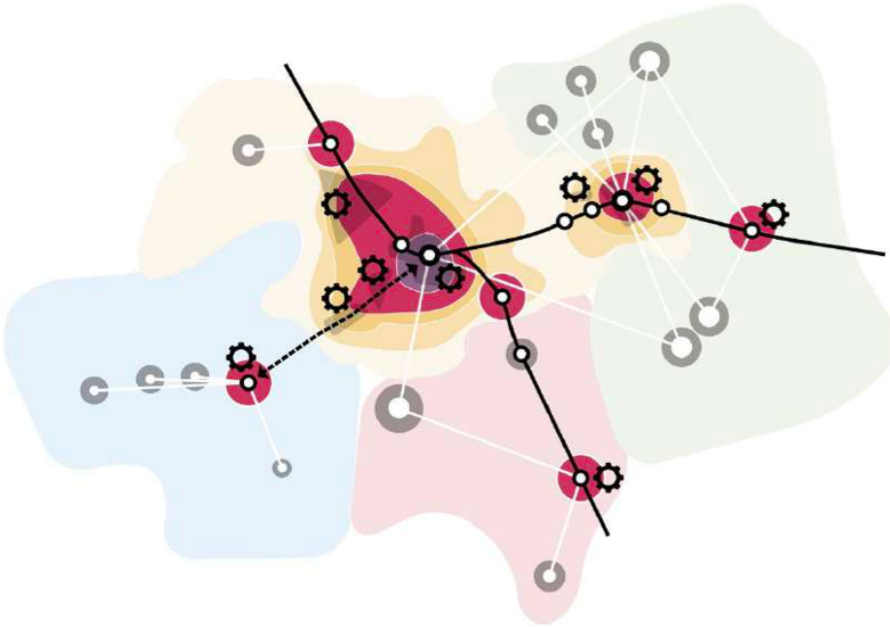

Figure 7: sub-regional hubs of the MRE (“ontwikkelstrategie Zuidoost-Brabant”, 2023).

Equivalent to the housing deal of the MRE, this policy document also demonstrates vertical and particularly horizontal governance strategies, as multiple regional actors share a collective responsibility for housing, economic development and mobility. In that regard, the development strategy Southeast-Brabant complements the regional housing deal by further improving regional spatial coordination and cooperation, after the period of the housing deal.

4.2 Regional housing outcomes

In order to reach research objective two and answer research question three “How do recent policy reforms influence regional housing outcomes?”, three dimensions and corresponding KEQs have been developed. This paragraph will present relevant and necessary data that has been obtained through interviews with municipalities and housing corporations, using the structure of the three dimensions affordability, decommodification and democratization.

4.2.1 Affordability

The first dimension that has been analysed is affordability. The KEQ that had been developed for this dimension is “to what extent have municipalities and corporations experienced a shift in terms of affordability since 2022?”.

Out of the six interviewed municipalities, three (Eersel, Heeze-Leende, and Helmond) reported a notable shift in affordability. In Eersel and Heeze-Leende, this was primarily due to a significant increase in the mandatory percentage of social rent housing in new projects, driven by the implementation of the Housing deal. Helmond, despite reducing its mandatory social rent share from 38% to 30%, also reported improvements, largely attributed to increased focus on the middle rent segment. The remaining municipalities, including Eindhoven, Bergeijk, and Deurne, did not experience a significant shift. In these cases, the lack of change is largely explained by their already high social rent requirements (30% or higher), meaning recent policy shifts had less impact.

With regard to the semi-public sector, all interviewed housing corporations experienced a substantial expansion of their project portfolios. For instance, Woonbedrijf nearly tripled its housing output, and WoCom more than doubled its project pipeline. These developments are largely attributed to regional policy alignment, the Housing deal and the scale-up, which improved collaboration with municipalities. Only Woonpartners cited internal restructuring as the primary cause of portfolio growth, rather than external policy change.

Additional factors influencing affordability include regional uniformity in social rent policy, which has increased predictability for developers, and challenges faced by smaller municipalities, particularly in implementing the 30% social rent mandate in small-scale projects. Furthermore, limited municipal employee capacity, especially in smaller municipalities like Heeze-Leende, emerged as limiting factors for the increase and acceleration of housing development.

In conclusion, municipal experiences with affordability vary based on policy shifts and local conditions, while housing corporations have uniformly scaled up development activity, contributing positively to affordability in the region. All of the above mentioned themes and factors will be further explained in the remainder of this paragraph.

4.2.2. Local rent policy

Despite the fact that distribution of municipalities that experienced a change in affordability was perfectly balanced, five out of the six municipalities related this change to the mandatory percentage of social rent that changed or did not change. Because of the importance of the social renting sector, the following table was developed in order to gain an insight on the social renting sector of all the interviewed municipalities. This table includes the current percentage of social rent stock (ABF, 2022), the mandatory percentage of social rent before 2022 and the mandatory percentage after 2022 (interviews, 2025).

Sub-region	Kempen		De Peel	A2	SGE	
Municipality	Eersel	Bergeijk	Deurne	Heeze-Leende	Helmond	Eindhoven
Stock %	16,5%	13,4%	24,4%	14,3%	36,8%	37%
Mandatory % prior to 2022	21%	30%	25%	15%	38%	30%
Mandatory % after 2022	30%	30%	30%	30%	30%	30%

Table 4: Overview social rent sector interviewed municipalities, (ABF, 2022; interviews municipalities, 2025)

Out of the six municipalities, three mentioned to experience a significant change in terms of affordability since 2022. From these three, the municipality of Eersel and Heeze-Leende primarily referred to the additional attention that the social rent sector has received on a local scale since 2022. Both mentioned that the mandatory percentage of social rent houses in housing projects significantly increased since the introduction of the Housing deal. For the municipality of Eersel this meant an increase from 21% to 30%. The municipality of Heeze-Leende saw an even bigger increase, their mandatory percentage of social rent houses doubled from 15% to 30%. In the interview with Heeze-Leende, the following was mentioned about the percentage of social rent houses in their housing policy.

> *So we did indeed have a percentage of social rent in our policy. However, this was only about 15 percent. This choice was made based on the fact that our social rental stock is about 15% of the total stock. So in line with that, we wanted to continue this percentage for the future.*
>
> *Only because of all kinds of developments, like the large waiting list at the housing corporations and the gap that has arisen between starters who simply cannot get a house, that has turned out to simply be far too little. (Policymaker, Heeze-Leende)*

In addition to the municipalities of Eersel and Heeze-Leende, the municipality of Helmond also mentioned to have experienced a change in terms of affordability (policymaker, Helmond). However, in contrast to the earlier mentioned municipalities, the mandatory percentage of social rent in housing projects did not increase in Helmond. In fact, Helmond even implemented a decrease of the mandatory percentage social rent from 38% to a minimum of 30%. Despite this politically-sensitive decrease, Helmond did mention experiencing positive changes in affordability since 2022. This primarily originates from the increased attention that the middle rent sector has received (Policymaker, Helmond).

In contrast to Helmond, Eersel and Heeze Leende, the other three interviewed municipalities did not mention having experienced a significant change in terms of affordability. The most important reason that was mentioned by all three municipalities is the fact that they already applied a relatively high mandatory percentage of social rent in housing projects. In fact, despite the big contradiction in the percentage of already existing social rent houses (15% in Bergeijk compared to 43% in Eindhoven), both the municipality of Bergeijk and Eindhoven already applied a minimum of 30% in their housing policy. The municipality of Deurne was the only municipality that did increase the mandatory percentage for social rent houses after 2022, and did not experience a significant change in terms of affordability. In the interview with Deurne, the policymaker explained this as follows: "*In the past we applied a minimum percentage of 25%, recently that has shifted to 30%... So there has been a slight shift in percentages perhaps, but not much else.*"

4.2.3. Regional uniformity

Another frequently mentioned factor that has positively influenced the affordability in the MRE, is the uniformity among the municipalities in the region. Seven out of nine interviewees mentioned that (nearly) all municipalities in the region have applied the same mandatory percentage of social rent in their housing policy. As a result of this regional uniformity, project developers know where they stand, which leads to smoother negotiations between project developers and municipalities (housing policy developer, Eersel). This view was confirmed by the municipalities of Bergeijk, Heeze-Leende, Helmond and Deurne. Lastly named municipality even mentioned the influence of the policy changes on a national scale:

What you do notice more clearly is that since 2022, because the central government has been so insistent on the 30% social rent, developers have become much more aware that they also need to do something in the social segment. That's not to say they're not trying to get away with it, but they do have it much more in their mind.

It's not just something I'm asked to do locally by a municipality, but this is also something a municipality has to do as part of the whole program of the central government. On the one hand, that makes it easier doesn't it? Because the conversation can just be held on a better basis. (housing policy developer, Deurne)

In line with the view of Deurne, the municipality of Heeze-Leende explained that as a result of the Housing deal, the discussions with project developers have decreased. This can be explained by the fact that smaller municipalities, like Heeze-Leende, can 'hide' themselves behind the Housing deal (housing policy developer, Heeze-Leende).

4.2.4. Increased project portfolio

In the conducted interviews, all housing corporations explained that their project portfolio, which consists out of all the newly built housing projects, did significantly increase since 2022. Despite this initially positive finding, the reason for this phenomenon differs between the corporations. During the interview with Woonbedrijf, the real estate manager explained that their yearly housing ambition increased from 250 to 665, because of the growing housing shortage in the social housing sector. In combination with the earlier described uniformity about the mandatory 30% social rent among the MRE-municipalities, their projects portfolio significantly increased over the last three years (real estate manager, Woonbedrijf).

In line with Woonbedrijf, WoCom did also partly explain their project portfolio increase with the national and regional policy developments of recent years. In addition to that, the housing deal was also mentioned as perhaps the biggest contributor to their portfolio increase. In the interview with WoCom, the real estate manager explained that as follows:

A few years ago we had a project portfolio of around 40% and now we are at 110%. I really dare say that on the one hand this is due to the effort we put in, on the other hand it is largely due to the Housing deal. (real estate manager, WoCom)

In contrast to both Woonbedrijf and WoCom, Woonpartners experienced the housing deal and other external policy changes to be less important compared to other factors. During the interview with Woonpartners, the manager real estate largely related their project portfolio increase to internal management changes that occurred approximately six years ago (real estate manager, Woonpartners). Before this change, the policy of Woonpartners consisted of neither growth nor shrinkage of their housing portfolio. In reaction to this self-drawn observation, the real estate manager of Woonpartners mentioned the following:

Well, If you are the largest corporation of Helmond and you have that motto, then you also know how bad it is with our project portfolio. It was almost non-existent at the time… So we did have to put ourselves back on the market (real estate manager, Woonpartners)

4.2.5. Implementation in small-sized projects and municipalities

Despite the positive and hopeful intentions with regard to the mandatory percentage of social rent, multiple interviewees also mentioned the practical difficulties of this policy. Heeze-Leende and Eersel explained that one of these practical difficulties is the implementation of this percentage in smaller sized projects. In general, smaller municipalities (population wise) tend to have relatively more small-scale projects and less large-scale projects, than highly populated municipalities (Housing policy developer, Heeze-Leende). In the interview with Heeze-Leende, the interviewee explained the struggles for a smaller sized municipality as follows:

It's not easy, of course. Especially in a small municipality to always get that housing deal all the way in. Because when you have small projects it's not easy. In a municipality like Eindhoven, or another municipality that often develops many larger sized projects, I think it's a little bit easier. (housing policy developer, Heeze-Leende).

As a result, low populated municipalities can potentially experience more difficulties with the ambition to develop 30% social rent houses among all newly built houses, compared to high populated municipalities. In the interview with Eersel, the policy developer endorsed this potential outcome by explaining the possibility that in practice not 30%, but 25% of all newly built houses will be developed in the social rent sector. The interviewee linked this potential outcome directly to the small-scale projects that cannot consist of 30% social rent houses, which decreases the overall percentage of newly built social rent houses in the municipality.

Despite this expectation, Bergeijk and Eersel, which are considered to be small-sized/rural municipalities from the Kempen region, acquiesced to this potential outcome. The most important reason for this, which was mentioned by both policy developers in the interviews, is the demand difference in social rent between small-sized municipalities and large-sized municipalities. The policy developer from Eersel underpinned this finding with a recently conducted housing market research. Based on the (expected) demand, this research concluded that a mandatory percentage of 25% social rent would be enough to meet the expected demand in the municipality of Eersel (housing policy developer, Eersel). After conversations with the province, the municipality of Eersel decided to implement the regionally aligned 30% and not the earlier described 25%.
The municipality of Bergeijk also referred to the local differences of social rent supply between small-sized municipalities and large-sized municipalities. In the interview with Bergeijk, the housing policy developer mentioned the following:

> *Differences do not need not be bad, does it? Because in a rural municipality, the local need for social renting may also be much less than in urban municipalities. For instance, why do Eindhoven and other cities or larger villages consist of 35% to 40% out of social rent houses and in a small municipality only 15 or 20%? That has to be related to something (housing policy developer, Bergeijk).*

4.2.6. Employee capacity

During the interviews, the constrained employee capacity of municipalities was identified as another limiting factor related to the development of affordable houses. Notable is the fact that all housing corporations mentioned this practical difficulty in the interviews, in contrast to only one out of the six municipalities.

In the interview with Woonpartners, the real estate manager explained that they desire to speed up a number of housing projects. However, this is not possible due to the constrained employee capacity of the municipality of Helmond, which is the result of the recent increase in workload, in combination with the working method of municipalities. According to the real estate manager from Woonpartners, *"municipalities need to assess way too much and work too much by themselves"*. In order to solve both problems, Woonpartners mentioned a change in working method by both national and local governments. On a national scale, the assessment of housing projects should be made more simplistic. On a local scale, municipalities should entrust housing corporations and other stakeholders more, to carry out more work and decrease their own workload (manager real estate, Woonpartners).

Out of the six municipalities, only the municipality of Heeze-Leende mentioned their current employee capacity to be a potential delaying factor. During the interview with Heeze-Leende, the housing policy developer explained that a smaller municipality like Heeze-Leende experiences difficulties on the labour market. As a result, there have been a lot of employee changes in the spatial planning department of Heeze-Leende, including the exchange of experienced employees for less experienced employees (housing policy developer, Heeze-Leende).

In addition to the municipalities of Eersel and Bergeijk, the municipalities of Helmond, Deurne and Eindhoven also did not mention significant capacity implications in relation to the housing ambition that has been defined in the Housing deal. However, lastly named three municipalities did mention that 'Beethoven' and the 'scale-up', that influence the housing ambitions between 2030 and 2040, already caused or will cause a reorganization. During the interview with the municipality of Eindhoven, the housing policy developer mentioned that *"the organization started to 'run' since the introduction of Beethoven"*.

4.3. Decommodification

The second dimension that has been analysed is ‘decommodification’. The KEQ that had been developed for this dimension is “to what extent have municipalities and corporations experienced a shift in terms of decommodification since 2022?”.

Since 2022, municipalities have shown a moderate but increasing shift toward decommodification, while housing corporations have faced more structural and legislative limitations that have hindered similar progress.

Four out of six municipalities reported becoming more proactive in their land policies, with Deurne, Helmond, Bergeijk, and Heeze-Leende citing the regional scale-up and Housing deal as key drivers. This proactive stance enables municipalities to exert greater control over land and project development, favouring affordability over market-driven prices. Heeze-Leende also highlighted the qualitative benefits of municipal-led development, noting that affordability targets are harder to meet when land is sold to private developers who prioritize market rates.

However, housing corporations have not adjusted their land policies due to restrictive legal frameworks. They are discouraged from purchasing strategic land positions because such investments must be realized quickly and carry high financial risks. Instead, their contribution to decommodification is limited to critical assessment of their existing housing stock, including selective demolition and rebuilding, often allowing for an increased number of affordable units per site.

In terms of real estate acquisitions, half of the municipalities (Heeze-Leende, Eersel, and Eindhoven) have bought existing properties to meet urgent housing needs, such as accommodating refugees. In contrast, housing corporations did not engage in purchasing existing real estate, again citing legal and financial limitations.

Regarding the middle rent segment, there is divergence between municipal demand and corporate ability. While urban municipalities such as Helmond and Eindhoven recognize growing demand and seek stronger corporate involvement, smaller municipalities like Deurne view this segment as less relevant. Corporations expressed a clear willingness to support this segment but are constrained by national and EU regulations and limited funding. Only Woonbedrijf, due to its size and financial capacity, has managed to formulate a substantial middle rent strategy.

In conclusion, municipalities have shown a moderate but increasing shift toward decommodification, through more active land and property policies. Housing corporations, while aligned in ambition, remain structurally limited due to national and EU regulations and their financial capabilities. All of the themes and factors mentioned above will be further explained in the remainder of this paragraph.

4.3.1. Proactive land policy

In the interviews, four out of the six municipalities explained that their local land policy became more proactive between 2022 and 2025. The remaining two municipalities, consisting of the municipality of Eindhoven and Eersel, already applied a proactive land policy before 2022, which was unchanged in the years after.

Out of the four municipalities that had changed their land policy, the municipalities of Deurne, Helmond and Bergeijk all mentioned the quantitative ambition of the scale-up as the most important contributor. In the interview with Helmond, the housing policy developer explained this by mentioning:

We didn't have an active land policy from 2017, until in 2024 the council expressed that they wanted to go back to an active land policy… What is influential are the agreements from the scale-up, those existed prior to the housing deal in our region (housing policy developer, Helmond).

The municipality of Heeze-Leende was the only municipality, out of the 4 that have changed their land policy since 2022, that also mentioned the qualitative ambition in addition to the quantitative ambition. During the interview, the housing policy developer explained that the development of affordable houses is more difficult in projects from project developers, compared to projects from the municipality itself. An important side note is the fact that municipalities do not have the possibility to pay as much for the land as a project developer, especially if the latter does not take the housing deal into consideration. As a result, land sellers are often disappointed with offers from the municipality. The housing policy developer from Heeze-Leende explained this as followed:

> *Earlier, developers bought land for 70 or even 80 euros. However, they could put all kinds of expensive houses on it. Now, with the current affordability requirements, it is financially impossible to develop for those prices. So yes, if they still have that in their heads, then it is disappointing what we come up with (housing policy developer, Heeze-Leende).*

Despite this positive change among the interviewed municipalities, results show the opposite for the interviewed housing corporations. As a matter of fact, not a single housing corporation mentioned actively acquiring any new strategic land positions in order to contribute to the regional housing ambitions. In addition to that, not a single housing corporation even considered changing their land policy. The most important reason that was endorsed by all interviewees is the current legal framework, which makes it unattractive and practically almost impossible for housing corporations to purchase and develop strategic land positions. During the interview with Woonpartners, the real estate manager explained that by mentioning that they are *“really facing a couple of problems and that is that if you purchase something, it just has to be realized within a couple of years”*.

Despite this legal framework and its limiting consequences, the interviews do suggest that housing corporations try to proactively contribute to the qualitative and quantitative ambitions. As a matter of fact, all three interviewed housing corporations mentioned to look (more) critically at their existing housing stock and the possibilities that this has to offer. In practice this often means a weighing between renovation or demolition and rebuilding the outdated houses. In case of the last option, housing corporations have the possibility to add more houses if the location can be designed more efficiently. This sounds positive, however, this is often considered as an unpopular choice by renters, because they have to leave their (outdated) house (Manager Real estate, Woonbedrijf). In the interview with Woonbedrijf, the real estate manager explained their choice to demolish and rebuild in specific cases as followed:

Sometimes our properties can be renovated and sometimes we make the unpopular choice to demolish and rebuild. But then we do it for a reason...This allows us to develop 3 or 4 times as many houses as the original amount of houses (real estate manager, Woonbedrijf).

Two of the interviewed municipalities, in this case the municipality of Eindhoven and Deurne, emphasized the importance of the efficient utilization of the existing housing stock. The municipality of Eindhoven explained this based on the absence of available and usable land in the highly urbanized municipality.

4.3.2. Real estate acquisitions

Besides the acquisition of land, half of the interviewed municipalities mentioned actively buying or having bought existing properties since 2022. All three municipalities, which include the municipality of Heeze-Leende, Eersel and Eindhoven, based their choice on the increased affordable housing demand of more vulnerable target groups. As an example, the municipality of Eersel recently purchased an existing property, in order to accommodate Ukrainians who have escaped the war in their country (housing policy developer, Eersel). Despite this effort, the municipality of Eindhoven mentioned that *"over the years, only more target groups came into the picture, all wanting the same affordable housing. In practice, we are experiencing that this is really difficult"* (housing policy developer, Eindhoven).

The remaining three municipalities that did not mention actively buying existing real estate, did not give an unequivocal reason for this. One of the interviewees mentioned he considered this more as a task for project developers and housing corporations rather than municipalities (housing policy developer, Bergeijk).

Out of the interviewed housing corporations, not a single one mentioned actively buying existing properties. In line with the earlier explanations with regard to the acquisition of new land, the legal framework and financial possibilities are considered to be important factors that make it unattractive for housing corporations to purchase already existing buildings (real estate manager, WoCom).

4.3.3. Middle rent segment

Because of recent developments with regard to the middle rent segment, including national tax regulations on the one hand and increased attention in the housing deal on the other hand, interviewees were asked about their experiences with this segment.

Despite the wide variety of experiences and opinions with regard to the middle rent segment, all interviewees did in fact confirm the importance of this segment. However, on a local scale the urge to actively develop more middle rent houses differed among the municipalities. Especially the smaller sized municipalities, like Bergeijk and Deurne, mentioned experiencing a limited demand for this price segment. In contrast to the smaller sized municipalities, both the highly urbanized municipalities of Eindhoven and Helmond mentioned experiencing a significant demand for middle rent houses.

During the interviews the focus was primarily put on newly built middle rent houses because of the potential steering possibilities of municipalities and housing corporations. In terms of the decommodification of this price segment, the findings varied among the interviewees. Out of the six municipalities, two municipalities did not mention any specific developments and one municipality mentioned to expect this segment to remain privatized. Most of these municipalities primarily based this on the limited demand for this price segment. In the interview with the municipality of Deurne, the housing policy developer mentioned that “in municipalities like Deurne, most people actually prefer to own their house and land”. As a result, the limited needed supply of newly built middle rent houses remains to be developed by local project developers (housing policy developer, Deurne).

Two municipalities that did recognize an increased demand for middle rent houses, which include the municipality of Heeze-Leende and Helmond, mentioned to investigate the role of housing corporations in this segment. Both municipalities desire a more prominent role of their local housing corporations, which in this case are the interviewed housing corporations WoCom and Woonparters.

During the interviews with the housing corporations, all interviewees mentioned the ambition to fulfil a more prominent role in the middle rent segment. The real estate manager of WoCom explained this by stating: “We see that the market has not picked up the middle segment, so there is a real problem there. As of last year we decided that we should also be there for those people”.

Despite this clear and uniform conclusion with regard to the development of middle rent houses, most interviewed housing corporations mentioned to be unable to fully fulfil this role. Both WoCom and Woonpartners explained this concerning finding based on the availability of financial resources. In line with the restrictive rules about land acquisition, interviewees explained that housing corporations are highly restricted to invest in the middle rent segment due to national and European legislation (real estate manager, Woonpartners). In the interview with Woonpartners, the real estate manager highlighted this problem as followed:

> *The next few years we are building 100 to 200 middle-rent houses. But we can't do more, even though there's a lot of demand for those houses. If we were able to get*

> *that financed, yes, we would do it immediately. But that's where the laws and regulations get in the way again. (real estate manager, Woonpartners).*

In comparison to Woonpartners and WoCom, housing corporation Woonbedrijf experienced less financial difficulties in relation to the development of middle rent houses. In the interview with Woonbedrijf, the real estate manager explained that their corporation recently formulated the ambition to develop 665 middle rent houses between 2025 and 2035. In a reaction to this statement, the interviewer asked the interviewee for an explanation with regard to the financial differences between housing corporations. The real estate manager from Woonbedrijf explained this by mentioning that:

> *However, realizing 65 houses a year, that involves a lot of money. We cannot keep that up for centuries, unfortunately. But because we are a large corporation, we do have the financial means to do more than other corporations (real estate manager, Woonbedrijf).*

4.4. Democratization

The third and final dimension that has been analysed is ‘democratization’. The KEQ that had been developed for this dimension is “to what extent have municipalities and corporations experienced a shift in terms of democratization since 2022?”.

Municipalities have notably taken greater responsibility for achieving qualitative and quantitative housing goals. This is facilitated by the implementation of governance instruments such as local housing visions (“woonvisies”), target group regulations (“doelgroepenverordening”), and compensation funds (“vereveningsfonds”), which strengthen their steering capacity. Four of the six municipalities developed new housing visions since 2022, using these tools to embed public goals and control private or semi-public actors, reflecting a strengthening of democratic oversight in local housing governance.

Accountability has also improved within and between sectors. Municipalities increasingly align with national objectives and regional collaborations, strengthening public sector coherence. Likewise, within the semi-public sector, cooperation among housing corporations has improved, though mainly in response to internal developments rather than external policy frameworks. More significantly, inter-sectoral accountability between municipalities and housing corporations has increased, driven by shared responsibilities under frameworks such as the Housing deal and the scale-up. This has led to improved collaboration, as seen in practices such as joint project teams, co-location of municipal and corporate staff, and informal trust-based agreements.

In terms of governance strategies, municipalities increasingly rely on hierarchical governance, using regulation and policy tools to enforce housing objectives. Simultaneously, horizontal strategies centred around networks and informal cooperation, have gained

traction, particularly between municipalities and housing corporations. In contrast, market-oriented strategies are largely absent, suggesting a shift away from commodified, market-driven models toward more state-led and collaborative approaches.

In conclusion, democratization has increased primarily through the empowerment of public actors and enhanced collaboration with semi-public organizations. While municipalities have taken concrete steps to regain control over housing outcomes, housing corporations, within the limits of their financial and legal capacities, have engaged more cooperatively. This evolving governance dynamic marks a significant but still developing shift toward democratization in Dutch housing policy since 2022. All of the themes and factors mentioned above will be further explained in the remainder of this paragraph.

4.4.1. Responsibility

Among the municipalities all interviewees mentioned taking (more) responsibility in order to reach the quantitative and qualitative affordable housing ambitions. An important factor that explains the accountability of municipalities is the implementation of instruments which increases the steering capacity of municipalities. An example of a frequently mentioned instrument is the local ‘woonvisie’ -freely translated into housing vision-, which allows municipalities to embed their housing ambitions on a local scale. Out of the six municipalities, four mentioned to have developed a new housing vision between 2022 and now. Other frequently mentioned instruments include the ‘verevingsfonds’, a fund that obliges housing developers to financially compensate for projects that do not meet the mandatory social rent percentage, and the ‘doelgroepenverordening’. Lastly named instrument obliges housing developers to rent or sell affordable houses to predetermined target groups for a predetermined period. One of the municipalities that primarily explained a change in democratization based on the implementation of the right instruments, was the municipality of Eersel. During the interview with the housing policy developer, the interviewee answered the question “Do you see that since 2022 public parties have been getting more power and steering capacity in the decision-making process of housing projects?” as followed:

> *Yes, but that's because of the policies we've implemented. For instance, target group regulation, compensation funds and active land policy… You really do need those. You have to be able to use your instruments in the right way and not just apply them in private agreements. You need to have the policy in order, I think (housing policy developer, Eersel).*

In addition to the municipalities, also housing corporation WoCom mentioned the importance of tools like the target group regulation. In line with WoCom, the real estate manager from Woonbedrijf also identified the risk of private social housing prematurely being sold, which potentially can be solved by target group regulation.

4.4.2. Accountability

During the interviews, the accountability relationship between and within the public and semi-public sector have been discussed extensively. In the following paragraphs developments with regard to both accountability relationships will be further explained.

Within sectors

During the interviews with the municipalities, multiple interviewees mentioned experiencing an improved accountability relationship *within* the public sector. An important reason for this, which is to a lesser extent included in the research of Tassan-Kok et al. (2019), is the role of the national government. During the interviews, all municipalities except for the municipality of Eindhoven, mentioned the importance of the national government in relation to the consciousness, acceptance, and monitoring of affordable housing ambitions. Subsequent to the role of the national government, the accountability relationships on a regional scale have also improved. This can partially be explained by the responsibility that all MRE-municipalities have taken in recent years with regard to affordability, as explained in chapter 5.1. But also due to an improved cooperation among municipalities in the region, which for instance was mentioned by the municipality of Helmond (housing policy developer, Helmond).

Besides improved accountability relationships within the public sector, multiple interviewees also mentioned improved cooperation and accountability relationships within the semi-public sector, which in this research consist of the housing corporations. One of the municipalities that mentioned this in their interview is the municipality of Deurne. The housing policy developer explained this by stating that “the housing deals have significantly promoted and strengthened the cooperation in the region between the housing corporations. Because before, of course there was some cooperation in the SGE, but I think since the housing deals, those 13 together have started to operate much stronger” (housing policy developer, Deurne)

Out of the housing corporations only Woonpartners mentioned a (positive) change in cooperation between itself and other housing corporations. However, this change was not related to changes in external policies, like a national program or regional housing deal, but due to their internal managerial changes (real estate manager, Woonpartners). This aligns with earlier presented findings with regard to their growing project portfolio.

Between sectors

In line with the previously mentioned research by Tassan-Kok et al. (2019), findings do not only confirm existing accountability relationships *within* different sectors and organizations, but also suggest existing and even improved accountability relationships *between* sectors. This change was especially mentioned by the interviewed housing corporations, which all verified a recently improved cooperation between the public sector (municipalities) and the semi-public sector (housing corporations). An important reason which was mentioned by all interviewed housing corporations, is the fact that housing corporations experience that municipalities take more responsibility to develop affordable housing. The reasoning behind

this increase in accountability and the subsequent implications differ among the housing corporations. During the interview with WoCom, the real estate manager explained this as followed:

Well, I think because of the housing deal you no longer have to discuss at the project level what proportion of social rent should be realized. I think we have all accepted that as a given, 30% is really the starting point everywhere. In this, I think everyone has taken their responsibility.

The fact that there are just municipalities that just put projects at the bottom of the pile if the developer does not manage to incorporate enough social housing, shows responsibility in my opinion (real estate manager, WoCom).

The other two interviewed housing corporations did not specifically link the housing deal with an increase in accountability. The real estate manager from Woonpartners highlighted the improved relationship between their own director and the directors of the municipality of Helmond. As a result, the municipality became more aware of their social responsibility, which they share with the housing corporation. Consequently, the cooperation between the municipality of Helmond and Woonpartners improved (real estate manager, Woonpartners). Also housing corporation Woonbedrijf, which primarily is active in the municipality of Eindhoven, mentioned to experience an increased responsibility by municipalities to realise the housing ambition of the scale-up (real estate manager, Woonbedrijf). This is noticeable in the cooperation between the corporation and the municipality of Eindhoven, which significantly improved since September 2023. In relation to this improved cooperation, the real estate manager from Woonbedrijf mentioned the following:

> *We mentioned that if we want to realize the numbers, then we must also change something in our way of working. Because well, we are all unwieldy machines and how can we speed up housing development? As a result, a team of 20 people, varying from employees of the municipality of Eindhoven to the four corporations, are physically present in our office and continuously working on these projects… so at least you can see in that way of working, that there is a real urgency with them (the municipality) to do things differently as well (real estate manager, Woonbedrijf).*

To a lesser extent, the municipalities also mentioned the cooperation with the housing corporations in their interviews. In fact, four out of six municipalities mentioned experiencing good cooperation with their local housing corporation(s). Out of these four, the municipalities of Heeze-Leende and Helmond, mentioned experiencing that the cooperation had improved since the introduction of the Housing deal. During the interviews with the municipalities of Eindhoven and Eersel, cooperation with the housing corporation was not mentioned.

In terms of a further improvement of the cooperation between the public and semi-public sector, especially the housing corporations had a number of suggestions. For instance, the real estate manager of WoCom suggested the earlier explained working method of Woonbedrijf, as a possible tool to further improve the cooperation with the municipalities. The real estate manager of Woonpartners suggested a working method in which the housing corporation takes a lot of work away from the municipality, resulting in a potential decrease

of the problematic high workload of municipalities, which has been explained in chapter 4.2.6.

Taking everything into account, the results primarily show that within each sector the interviewed organizations take more responsibility and accountability to reach the defined ambitions. And in addition to that, accountability relationships *between* the sectors have also changed in recent years. This is primarily the result of the defined ambitions from the housing deal and the scale-up, which hold municipalities and housing corporations both accountable for the quality and development of social housing. As a result, both sectors now provide each other services, which consequently has led to an improved cooperation between the two sectors. This slightly differs from the model that has been defined by Tasan-Kok et al. (2019), in which the private sector (which in this research is replaced by the semi-public sector) is only an accountor and in which the public sector does not provide a service to the private sector. Based on these results, the following figure can be developed to visualize the accountability relationship between the public and semi-public sector.

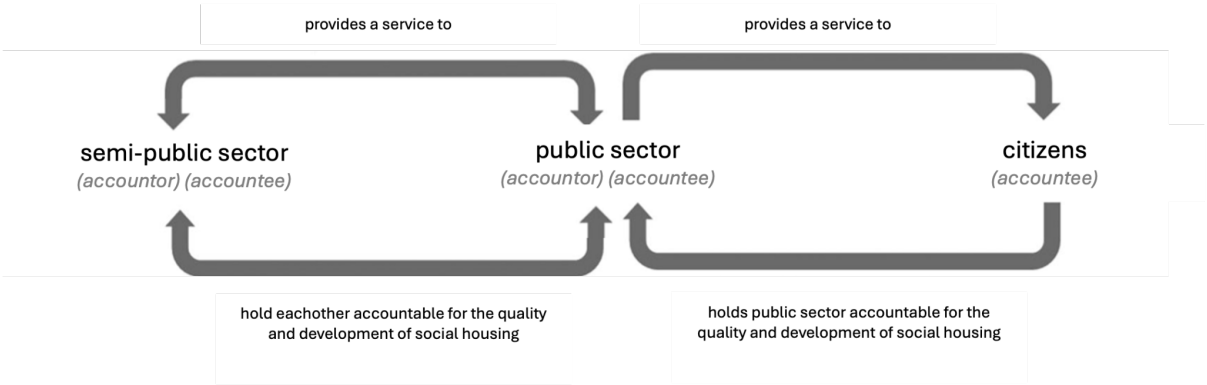

figure 8: accountability relationship semi-public sector, public sector and citizens (own figure)

4.4.3. Governance strategies

In order to identify how public goals have been identified and how other stakeholders are being controlled to reach these goals, we can investigate to which extent the three distinguished governance strategies by Buitelaar & de Kam (2009) are experienced by the interviewees.

Hierarchical governance strategy

The first governance strategy is the hierarchical governance strategy, which uses authority to influence organizations to act in a desired way (Buitelaar & de Kam, 2009). This governance strategy is frequently mentioned and implemented by the interviewed municipalities. In practice all interviewed municipalities have changed or added policies, to ensure that the right amount and types of houses are being developed. Examples of earlier mentioned policies and tools are local housing programs and target group regulation, which influence semi-public and private organizations to act in a desired way.

To a certain extent, the effectiveness of this strategy has been confirmed by six out of the nine interviewees, as they explained that private organizations have mostly accepted the publicly defined ambitions. Despite this finding, interviewees also mentioned to desire more control on a regional and national scale. A potential solution is the ‘wet versterking regie volkshuisvesting’, freely translated into reinforcement public housing control law, which obliges all housing regions to develop more than 30% of social housing (MVRO, 2025). This law is currently being developed and will probably be implemented in 2026 (MVRO, 2025).

Horizontal governance strategies

The second governance strategy is the horizontal strategy. Besides the hierarchical strategy, this governance strategy is also frequently implemented. This is primarily reflected in the interviews with the municipalities, in which the importance and use of ‘networks’ was mentioned multiple times. Notable is the fact that not a single interviewee mentioned the mandatory performance agreements between the municipality and the housing corporation as an important network to reach the defined ambitions. Instead, informal agreements and trust play an important role in the cooperation between the public sector and semi-public sector. This is contrary to the experienced cooperation between the public and private sector, in which formal agreements like the anterior agreement are frequently mentioned as important tools.

Market-oriented governance strategies

The third and final governance strategy is the market-oriented governance strategy, which uses market mechanisms to steer housing policy, rather than a top down or horizontal regulation (Buitelaar & de Kam, 2009). During the interviews, aspects of this governance strategy were hardly mentioned. This indicates a shift in which the public and semi-public sector implement horizontal and hierarchical governance strategies to a larger extent than market-oriented governance strategies.

5. Discussion

This chapter reflects on the key findings that have been identified in the results chapter, evaluating how they engage with existing theories and contribute to both academic debates and practical policymaking. In the following paragraphs, the theoretical implications, academic contributions, and practical lessons will be evaluated and discussed.

5.1. Theoretical implications

The application of a variety of theoretical frameworks in relation to the Dutch housing policy has revealed both strengths and limitations in current conceptualizations. For instance, Hall's policy paradigm framework (1993) proved a useful theoretical framework to identify the extent to which the identified shift in Dutch housing policy represents a clear and significant paradigm shift. However, the findings show that the reality in the MRE, and consequently also in other housing regions, is more complex than clear-cut paradigmatic shifts suggest. Although national and regional agreements show stronger steering possibilities on paper, the results suggest that in practice market actors and instruments continue to play an important role. This combination and consequent complexity does not perfectly fit within Hall's policy paradigm framework (1993) of first-, second-, and third-order change. As such, a more nuanced conceptualization of gradual, mixed transitions in housing policy regimes may be necessary.

Furthermore, the governance strategies discussed by Buitelaar and de Kam (2009), which make a distinction between hierarchical, horizontal and network-based steering, were helpful to analyse the modes of coordination between national, regional, and local actors. However, in practice, the findings of this research demonstrate how these strategies often overlap. For instance, the regional housing deal combines top-down agreements between the national government and municipalities, with horizontal arrangements between municipalities and housing associations. Out of the three governance strategies, network-based steering was identified to a lesser extent than the hierarchical and horizontal governance strategies. This could potentially be explained based on the importance of the private sector in this strategy, while this research is limited to the experience of the (semi-)public sector.

Besides the potential influence of the private sector in the governance strategies from Buitelaar and de Kam (2009), this sector could potentially also be influential in relation to the post-neoliberal housing policy framework from Kadi et al. (2021). While this research succeeds in identifying changes of affordability, democratization and decommodification, based on interviews with the (semi-)public sector, it fails to present the experience and potential implications of the private sector in relation to this subject. Consequently, a suggestion for future research is to investigate to what extent the private-sector experiences this shift in post-neoliberal direction and what the potential implications of this shift are. These findings can be of significant importance to further improve future housing policy, as unrealistic and uncoordinated ambitions could result in an increase of negative implications, while the positive implications stagnate or even decrease.

5.2. Contribution to academic debates

This research contributes most directly to academic debates about the history and characteristics of post-neoliberal housing governance. While scholars like Béal et al. (2019) and Tasan-Kok and Baeten (2012) have discussed post-neoliberal urban policies in other contexts, this case study adds new insights into how post-neoliberalization plays out in the Dutch housing market. The findings suggest that post-neoliberalization in the Netherlands is not simply a full return to state-led policies of the past. Instead, provinces, local governments and housing corporations all together play an important role in the transformation of the housing market.

In addition to that, this research adds to the discussion on how well regional governance can tackle housing problems. Earlier studies have either praised regional cooperation for improving coordination (Raynor & Whitzman 2020) or criticised it for making responsibilities less clear (Walsh, 2012). This research shows that both views are partly true. In particular, both the housing deal and the development strategy of Southeast-Brabant demonstrate that regional agreements can help bring together local and national goals. However, it also shows that tensions can arise between municipalities with different capacities, priorities and characteristics. Findings suggest that some of the smaller sized municipalities experience difficulties implementing the qualitative ambitions of the housing deal, as the existing housing stock and demand significantly differ from this objective. While more urban municipalities like Eindhoven and Helmond experience more concerns with the implementation of the quantitative ambitions of the development strategy. Consequently, these differences affect how regional cooperation works in practice. As a result, future research could further investigate the implementation differences between small-sized and large-sized municipalities, with regard to state-led ambitions.

5.3. Practical lessons for policymakers and practitioners

One of the key findings of this research is the fact that all interviewed municipalities implemented the quantitative and qualitative ambitions of the regional housing deal, especially with regard to affordability, in their local policy. This shows that a top-down approach can result in a desired effect on a local scale and uniformity on a regional scale. Within this process housing policy developers play an important role, as it is their responsibility to develop and implement these regional ambitions on a local scale. As a result housing policy developers should monitor the implementation of these policy changes in practice, and, if needed, to adjust it in order to ensure its effectiveness. A potential limitation for effective post-neoliberal policy implementation among municipalities are the identified employee capacity problems. Particularly smaller-sized municipalities may need extra support in order to meet these commitments effectively, especially if the reinforcement public housing control law, which legally obliges all housing regions to develop more than 30% of social housing (MVRO, 2025), is implemented.

For housing associations, the findings highlight the importance of active participation in regional and local negotiations. Their role in both formal agreements with the state (through performance contracts) and in local partnerships makes them key players in connecting policy ambitions with real-life housing projects. Yet, because housing associations face legal limitations and financial pressures, it is crucial to not further limit the financial and legal possibilities of housing corporations, but rather to broaden these. In order to accomplish this, the national government should take their responsibility to publicly acknowledge and improve these conditions. The findings suggest that this is a crucial and necessary step for housing corporations to invest in the middle rent segment and to stimulate the further decommodification of the housing market.

When comparing the theoretical context of ‘democratization’ with the results of this research, it is noticeable that the voice of tenants and civil society is hardly named in the interviews. As a result this potentially shows an underdeveloped component in current housing policies, which could limit the possibilities to fully reach a third order paradigm shift. In order to exclude this policy deficiency, this could be further evaluated in future research.

6. Conclusion

This research aimed to investigate to what extent the Dutch regional housing market, with a focus on the Metropolitan Region Eindhoven (MRE), has undergone a shift in a post-neoliberal direction in the 2020s. To reach this goal, two research objectives were formulated. These include objective 1: “to identify the shift in national and regional housing policy from neoliberal to post-neoliberal”, and 2: “to identify how this policy shift has translated into housing outcomes on a regional scale”. These objectives were addressed through a combination of document analysis and nine semi-structured interviews with local municipalities and housing corporations.

In response to **Research Question 1**: “What are the characteristics of a paradigm shift into post-neoliberal housing policy?”, the document analysis highlighted that a post-neoliberal housing policy is characterized by improved affordability, increased democratization, and processes of decommodification (Kadi et al., 2021). These characteristics oppose the neoliberal trend of commodification, market governance, and declining public accountability. Furthermore, Hall’s framework (1993) showed that a policy paradigm shift requires not just instrumental changes, but a reordering of policy goals and values. Altogether, by answering (theoretical) research question one, a necessary theoretical base was formed in order to answer the more empirical research questions two and three.

Research Question 2: “How did Dutch national and regional housing policy change in the 2020s?” explored the changes in Dutch housing policy, on different scales, since the 2020s. Nationally, the re-establishment of the Ministry of Housing and Spatial Planning and the launch of the national housing and construction agenda mark a significant break from previous market-oriented policies. The introduction of the regional housing deals, which consist of compulsory housing agreements for all regions, has institutionalized a stronger coordinating role for the national government. Regionally, the MRE has embraced this with ambitious quantitative and qualitative housing targets until 2030, which have been embedded in the housing deal Southeast-Brabant. In addition to that, the MRE has formulated and agreed on additional housing targets until 2040, in order to facilitate the growth aspirations of the private (high tech) sector. These ambitions are publicly known as the scale-up and are embedded in the development strategy Southeast-Brabant.
Concluding, the executed literature study suggests a post-neoliberal shift in national and regional housing policy, with a particular focus on vertical and horizontal governance strategies (Buitelaar & de Kam, 2009).

Research Question 3: “How do recent policy reforms influence regional housing outcomes?” formed the core of this research, as it aims to show how these policy reforms have influenced housing outcomes in the MRE. This question was addressed using the three dimensions of post-neoliberal housing outcomes: affordability, decommodification, and democratization.
In terms of *affordability*, municipalities and housing corporations alike reported increased efforts to meet affordability targets. While three municipalities noted a shift due to rising mandatory percentages for social rent, others had already implemented ambitious affordability requirements before 2022. A key finding was the regional uniformity in social housing requirements, which has contributed to more predictable and streamlined

negotiations with developers. Housing corporations also reported a significant expansion of their project portfolios, often directly attributing this to the housing deal or scale-up, which consequently led to improved municipal collaboration. However, implementation remains challenging in small-scale municipalities due to constrained staff capacity and limited project sizes.

Regarding *decommodification*, there is evidence of growing municipal control over land and project development. Several municipalities have reactivated their land policies, partly to ensure affordability and quality of development. Moreover, some municipalities have purchased existing properties to house vulnerable target groups. However, housing corporations face structural and legal constraints that hinder proactive land acquisition, limiting their ability to support decommodification beyond managing their own housing stock.

Democratization, operationalized through public accountability and governance strategies, reveals more mixed outcomes. While municipalities are assuming a stronger coordinating role, the horizontal governance model in the MRE, which is characterized by informal cooperation and relational strategies, remains dominant. Though this fosters collaboration, it sometimes lacks binding authority and vertical accountability. This fragmented accountability structure can hinder enforcement of regional ambitions. Nonetheless, upcoming legislation in the form of the reinforcement public housing control law, and the ongoing institutionalization of regional cooperation, suggests a governance landscape that will keep evolving itself.

In conclusion, the Dutch regional housing market, and specifically the MRE, is showing meaningful progress towards a post-neoliberal housing market. The combination of stronger national coordination, regional cooperation, and targeted efforts to improve affordability and democratization highlights the effort of the (semi-)public sector to take a more active role on the housing market. However, the decades of neoliberalization prior to 2022 have led to several systematic barriers, such as legal constraints for housing corporations, limited municipal capacity, and the persistence of horizontal governance. Consequently, these barriers are hindering a full paradigm shift as described by Hall's (1993) third-order policy change.

As such, the national government should not limit its role solely on the establishment of national and regional housing ambitions and improving regional cooperation, but should also feel responsible for the practical feasibility of these arrangements. This means that the national government should focus on solving the manifests of their neoliberal housing policy of the past decades, which should give municipalities and housing corporations more legal and financial possibilities to fulfill the quantitative and qualitative housing ambitions and to reach a full paradigm shift.

7. Reflection

Looking back at the research process and methodology, writing this thesis was generally a challenging but complying process. Due to my personal work experience in the MRE, components like the case study selection and subsequent data collection, were relatively obvious and easy to obtain. Coding and analyzing the data was intensive and time-consuming, but very meaningful and important to answer the defined research questions.

Despite the advantages of my personal experiences and network in relation to this research, it was also a challenging factor in relation to my position as a researcher. My own personal experience and opinions could have influenced the interviewees if I had shared these before or during the interviews. For instance, a very neoliberal view on the market could have pushed the view of the interviewees also towards a more neoliberal market. However, by keeping it objective before and during the interviews, this influence was limited as much as possible.

In addition to that, several limitations and constraints could be identified after the completion of this research. The first limitation is the fact that the relevant national and regional housing policy has only recently been implemented. This, in combination with the naturally complex and long-lasting process of housing development (P. J. Boelhouwer et al., 2006), leads to a situation in which the physical implications of recent policy changes are difficult to identify. This limitation was identified early on in the research, resulting in a suitable academic framework, which limited the number of remarks by the interviewees. Despite this experience, I would recommend future research to evaluate the physical implications of these policy changes, rather than the non-physical implications that were the focus of this research.

Another limitation of this research is the timespan of it in relation to the political changes on a national scale. Between the beginning of this research in 2023 and the end in the summer of 2025, a number of changes have occurred in the political landscape of the Netherlands. Especially since April of 2025, a lot of political uncertainty has arisen, because of the spring note. In this note from the ‘new’ cabinet, a rental freeze was introduced (Rijksoverheid, 2025), which potentially could have put more pressure on the financial capabilities of housing corporations, endangering the future development of social housing, and consequently the further post-neoliberalization of the Dutch housing market. Eventually in June of 2025, the cabinet fell, which hindered the introduction of the rental freeze but also resulted in more political uncertainty with regard to the national housing policy. Because the interviews were conducted prior to these political events, data does not suggest that political uncertainty is a limiting factor in the post-neoliberalization of the housing market. However, chances are that if the interviews were conducted after these events, interviewees would indeed mention the political situation as a significant factor.

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Attachment A

Interview guide

Factor	Subfactor	Hoofdvraag	Deelvraag
Inleiding		Zou u uzelf voor willen stellen?	- Hoe lang bent u al in dienst bij uw organisatie? - Hoe bent u betrokken bij woonbeleid en of woningbouw projecten?
Betaalbaarheid (meer betaalbare woningen, minder dure)		Heeft er sinds 2022 een verandering plaatsgevonden op het gebied van betaalbaarheid op de woningmarkt?	- Hoe ziet deze verandering er precies uit?
		Wat zijn de oorzaken van het wel of niet veranderen van betaalbaarheid van de woningen in uw gemeente of regio?	- Wat is hiervan de belangrijkste geweest?
	Stakeholders	Welke partijen hebben hierin een belangrijk aandeel gehad?	- Op welke manier?
Centralisatie (van privaat naar publiek eigendom)		Heeft er sinds 2022 centralisatie plaatsgevonden op de woningmarkt in uw gemeente of regio?	- Hoe ziet deze centralisatie er precies uit?
	Woningsegmenten	Heeft er sinds 2022 centralisatie plaatsgevonden binnen bepaalde segmenten? (huur/koop/prijssegment)	- Welk segment het meeste? - Waar komt dit door?
	Bestaande voorraad	Ziet u in de	- Waarom

		bestaande woningvoorraad veel woningen of gebouwen van privaat naar publiek eigendom gaan?	gebeurt dit wel of niet volgens u?
	Grondposities	Verwerft uw gemeente of corporatie(s) meer grond voor woningbouw sinds 2022?	- Wat is hier de belangrijkste oorzaak van?
Besluitvorming (meer macht publieke partijen, minder private partijen)		Ziet u dat (vertegenwoordigers van) publieke partijen sinds 2022 meer macht hebben in besluitvorming van woningbouw gerelateerde zaken/projecten?	- Waar ziet u dit primair in terugkomen?
	Verantwoordelijkheid (accountability)	Neemt uw organisatie meer verantwoordelijkheid op de woningmarkt sinds 2022?	- Hoe uit deze verantwoordelijkheid zich? - Wat is hier de belangrijkste oorzaak van?
	Verantwoordelijkheid	Merkt u dat de andere organisaties ook meer verantwoordelijkheid nemen op de woningmarkt sinds 2022?	- Hoe merkt u dat?
	Governance strategie	Stuurt uw organisatie sinds 2022 meer op en binnen woningbouwprojecten?	- Op welke manier stuurt u meer? Kwantitatief en of kwalitatief? - Middels welke instrumenten doet u dit? Denk aan: omgevingsplan,

			omgevingsvisie, programma wonen, doelgroepenverordening
Conclusie		Vindt u dat er een significante verandering heeft plaatsgevonden op de woningmarkt sinds 2022?	Zo ja: - Wat is hier de primaire oorzaak van geweest? Zo nee: - Wat is hier de belangrijkste oorzaak van? - Hoe kan dit volgens u bereikt worden?
Closing questions		Hoe ziet u uw eigen persoonlijke rol op de lokale en/of regionale woningmarkt?	
		Wil u nog iets toevoegen of benoemen waar u nog niet aan toe was gekomen?	