UNIVERSITEIT VAN PRETORIA
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YUNIBESITHI YA PRETORIA

Social housing: Lessons learnt from the international experience

Dissertation submitted in partial fulfilment of the requirements for the degree
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Sosiale behuising: Lesse te leer uit die internasionale onderinding

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Samevatting

Sosiale behuising is 'n relatiewe nuwe studieveld in die Suid-Afrikaanse behuisingsektor. Die Nasionale Departement van Behuising is tans besig met die formulering van 'n sosiale behuising beleidsraamwerk. Die Departement het in die Behuisingswitskrif (1994) erken dat die ontwikkeling van sodanige raamwerk sal kan baat vind by verwysings na internasionale ondervindings. In hierdie studie is die voorsiening van sosiale behuising in Europa, Suid-Amerika en Afrika bestudeer met die oog daarop om die verskillende wyses waarop sosiale behuising voorsien word, uit te lig en te identifiseer en om die lesse daaruit te leer vir die ontluikende Suid-Afrikaanse sosiale behuising beweging te identifiseer.

In die studie is daar tot die gevolgtrekking gekom dat die primêre doel van sosiale behuising is om die noodsaaklike diens van behuising teen kosprys aan indiwidue met beperkte finansiële vermoëns beskikbaar te stel. Sosiale behuisingsprojekte word uitgevoer deur sosiale behuisingsinstellings (SBIs) wat geklassifiseer kan word volgens byvoorbeeld hul regsstatus of rede/motivering vir hul bestaan. 'n Deurdagte klassifikasiestelsel kan aangewend word om te onderskei tussen sosiale behuisinginstellings wat kwalifiseer vir staatshulp en die wat nie kwalifiseer nie.

Daar is verder tot die gevolgtrekking gekom dat die ontwikkeling van 'n geïntegreerde en effektiewe sosiale behuisingsbeweging afhanklik is van 'n reeks faktore wat almal in plek moet wees ten einde te verseker dat die verskillende vlakke wat deel uitmaak van 'n sosiale behuisingsbeweging op 'n wedersyds ondersteunende wyse kan saamwerk. Nasionale beleid en wetgewing skep die raamwerk van norme en standaarde waarbinne al die SBIs hul funksies moet uitvoer. Institusionele ondersteuning in die formaat van nasionale ondersteuningsagentskappe, tegniese ondersteuningsagentskappe en internasionale ondersteuningsagentskappe is noodsaaklik om te verseker dat 'n diverse reeks van primêre sosiale behuisingsinstellings kan ontwikkel. Dit is ook belangrik om regulerings- en moniterings meganismes in plek te stel ten einde te verseker dat die sosiale behuisingsektor alle finansiële hulp op 'n verantwoordelike en deursigtige manier aanwend.

Hierdie studie het ook tot die gevolgtrekking gekom dat sosiale behuisings-instellings in komplekse finansiële milieu's funksioneer. Daar is veelvuldige

instrument/meganismes beskikbaar waarmee sosiale behuisingsinstellings gefinansier of ondersteun kan word. Al hierdie instrumente wat onder andere belastingkortings insluit, vorm saam 'n omvattende finansieringsraamwerk. Daar is bevind dat elke instrument/meganisme 'n unieke rol in sodanige finansierings raamwerk vervul.

Daar is laastens bevind dat die bestuur van sosial behuisingseenhede deurslaggewend is vir die sukses van sosiale behuisingsprojekte. As die bestuur van sosiale behuisingsprojekte nie op 'n sensitiewe en deursigtige manier gehanteer word nie, kan selfs hoë ideale om mense met hulle behuisings-behoeftes behulpsaam te wees, sneuwel/misluk. Indien inwoners of huurders as gelyke vennote gehanteer word kan die bestuurstaak aansienlik vergemaklik word. Suksesvolle sosiale behuisingsprojekte kan slegs gedeeltelik deur ontwerp geskep word. Bestuurspraktyke wat daarop gemik is om tuistes eerder as blote akkommodasie te skep, is van veel groter belang.

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Supervisor: Professor Doctor MS Badenhorst

Summary

Social housing is a relatively new field of study in the South African housing sector. The National Department of Housing, as part of their multifaceted approach to address the housing crisis in South Africa, is currently in the process of developing a policy framework within which the emerging social housing sector is expected to operate. The White Paper on Housing (1994) acknowledged that the development of a social housing policy would require significant engagement with international expertise and experience. In this study the provision of social housing in Europe, South America and Africa was studied with a view to identify the particular ways and means in which social housing is provided under different situations and also, to identify the lessons that can be learnt from such experiences for the emerging social housing sector in South Africa.

The study concluded that the primary goal of social housing is to provide the essential service of housing at cost to people with limited financial means. Social housing projects are carried out by social housing institutions (SHIs) that can be classified according to *inter alia* legal status and motivation. Classification can, however, be used to distinguish between SHIs that qualify for public assistance and those that do not.

It was further concluded that the development of an integrated and effective social housing movement depends on a range of factors which all have to be in place if synergy is to be achieved between the various levels of the social housing movement. National legislation and policies create the framework, norms and standards within which all the actors in the sector have to fulfil their functions. Institutional support in the form of a national sponsoring agency, technical service organisations as well as international aid agencies are essential for the development of a diverse range of primary societies that are responsive to a wide range of accommodation needs. Regulation and monitoring mechanisms are essential to ensure that the sector uses the public resources allocated to it in a responsible and accountable manner.

In terms of the financing of social housing the study concluded that (SHIs) are operating/functioning within complex financial environments that are continuously changing. There are quite a few instruments/mechanisms that can be used to finance/support SHIs. All these instruments e.g. grants, tax incentives and public-private partnerships together form a comprehensive funding framework within which each instrument has a particular niche or function to fulfil.

Lastly, the study concluded that housing management is literally the end all with regards to social housing. All the good intentions to assist those in need of housing within a supportive environment can fail if housing management is not done sensibly and transparently. Great benefit can be achieved from treating residents or tenants as partners with a view to ease the task of management. Successful social housing estates are created partly through design, but even more importantly through good management practises aimed at creating homes and not merely accommodation.

LIST OF SEARCH TERMS

Social housing

Housing associations

Social housing institutions

Housing co-operatives

National sponsoring agencies

Technical service organisations

Social housing legislative framework

Financing social housing

Financial instruments/mechanisms

Housing management

Management structures

Unit allocation

Maintenance

Rent collection

Tenant participation

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