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State Directed Hybridity? – The Relationship between Non-Profit Housing Organisations and the State in Three National Contexts

Running head

State continues to have major impact on hybridisation processes

Abstract

This paper presents results from the first international comparative study of non-profit housing organisations in Australia, England and the Netherlands to engage with panels of organisational leaders. The study uses a 'modified Delphi method' with Likert-type scaled surveys, followed by in-depth interviews. The paper introduces the concept of hybridity as a way of understanding the interaction of state, market and community drivers in steering non-profit housing organisations. In all three countries, findings indicate that there are clear limits to independence from continued state influence. In England this takes the form of state-directed cross-subsidy and welfare reform, in Australia business development strategies have had to respond to volatility and reductions in state funding, while in the Netherlands public policy has recently restricted the remit of associations to a low income niche and reduced commercial involvement. These findings lend support to 'contested logics' models of organisational hybridity rather than either 'out-of-control monstrous hybrids' or linear privatisation models.

Selected keywords

comparative housing, social housing, housing investment

Author-supplied keywords

Delphi method, hybridity, non-profits

Introduction

For over 30 years researchers have recognised changes in the delivery of social and affordable housing involving the retreat of government, the advance of markets and specific roles played by non-profit providers which can be conceived as hybrid in the sense that they blend the characteristics of state, market and community organisations (Blessing, 2014). Organisational hybridity can be reflected in, for instance, a mix of social and commercial activities, mixed public and private funding, public supervision of private institutions, and tenant involvement in management decision-making. This paper explores, from the perspectives of senior officials within non-profit housing providers, the role that governments play as one of three main external influences (alongside the market and civil society) on the strategies of their organisations. Our unique data source for this study is a set of three purposively recruited panels in three countries with different housing systems: Australia, England and the Netherlands. Using this data the paper aims to understand and to interpret similarities and differences in non-profit housing provision in different national contexts and focuses specifically on the role of the state in shaping those characteristics. A key added value of this paper is in embedding into our analysis the perspective of organisational actors who are working with these contextual variables on a daily basis. While such data cannot lead to causal explanations, it can provide a richer grounded context in which to discuss and to interpret theoretical debates around notions such as hybridity and privatisation.

In this paper we focus on 23 survey questions (involving 42 data items), drawn from a larger panel survey with over 100 questions, which are concerned specifically with the role of the state. The selected data are used to test two research questions concerning the role of the state in hybridisation of non-profit housing in the three countries:

- i) Is there an inevitable and unilinear shift of power from state to market in the three cases?
- ii) Does reduced state resource dependence mean less state direction over housing non-profit housing organisations?

The paper derives from international collaboration between housing researchers in the three countries using a common modified Delphi methodology to engage leaders of non-profit organisations in a research process (see methodology section). Delphi is a method employed in futures research that aims to explore uncertain future scenarios using collaborative methods to build consensual views among expert actors by combining scaled survey questions with qualitative interviews (Linstone & Turoff, 1975). It has previously been applied to single studies of the non-

profit housing sectors in England, Ireland (North and South), the Netherlands and Australia. An added value of this paper is its comparative approach, which is based on a collaboratively designed survey instrument (varying only to reflect contextual variations in terminology and policy context). This brings comparative power to the analysis by allowing the research questions to be tested in diverse national contexts.

The paper begins with a theoretical framework outlining the changing role of the third sector in public services, the emergence of concepts of hybridisation and their application to specific changes in housing. This is followed by an overview of contextual differences between the three countries that is required to make sense of the comparisons and details of the methodology. Results are presented in four clusters of survey data each exploring different dimensions of the relationship between housing associations (HAs) and the state. Additionally each section draws on follow up qualitative interviews that were used to probe the meaning of survey responses. The final section reflects on the research methodology and presents conclusions of relevance to theory on the role of the state in the hybridisation of housing associations.

Theoretical Framework

The third sector in public services and the concept of hybridity

Recent years have seen a growing literature on role of the Third Sector in delivering public services (Rees and Mullins, 2016) and a critical literature on the overlaps between the state, the market and civil society arising from this (Evers, 1995; Powell, 2007; Brandsen et al., 2005; Evers & Laville, 2004; Billis, 2010; Smith, 2010; Buckingham, 2011; Skelcher & Smith, 2015). The notion of a 'mixed economy of welfare' was coined to describe the overlap between sectors and has since become well-established over a long period as public services have increasingly been provided by private for profit and non-profit actors who act as contractors to the state (Evers, 1995; Powell, 2007).

The concept of hybridity was developed within the non-profit studies literature to account for how competing drivers of state, market and community interact to shape decision-making within non-profit organisations (Brandsen et al., 2005; Evers & Laville, 2004). Evers later identified hybridity as 'part of the reconfiguration of the welfare state with its fairly separated spheres and its ways of placing service providers from society and the community under state control' (Evers, 2013, p. 197). The concept of hybrid organisations reflects the blurring of sector boundaries that has followed the welfare mix in which 'it is not just the economy but also the organisations themselves that have

become mixed' (Billis, 2010, p. 12). However, the concept of hybridity has been criticised for a lack of precision in relation to the causes and consequences of hybridity (Skelcher & Smith, 2015).

This paper is informed by this literature on hybridity and the alternatives it provides to more conventional accounts of privatisation and marketization of public services such as housing (Ginsburg, 2005; Watt, 2009). We argue that it provides the opportunity to explore processes of change involved in hybridisation through empirical research that is less constrained than accounts that assume a unilinear process of change from state to market under neo-liberal regime influences. It can thereby contribute to debates about contingency within neo-liberalism in housing (Hodkinson, 2011; Hodkinson et al., 2013). The hybridity literature opens up a wider range of possibilities of change between state, market and community influences since hybridity is now a 'permanent and inevitable characteristic of the third sector' (Brandsen et al., 2005). It also enables exploration of the links between changes in the external policy and resource environment and changes within individual organisations (Billis, 2010). For example there may be a 'mission drift' as 'pure' third sector organisations are corrupted by both the state and the market arising from shifts in resource dependencies (Cornforth, 2014). Billis sees hybridity as being 'about fundamental and distinctly different governance and operational principles' (Billis 2010, p. 3). He describes an 'associational model' as the pure form from which voluntary organisations are drawn away by their links with the state and the market and highlights a variety of combinations of state, market and civil society influence, each involving different forms of hybridisation.

There are several respects in which hybridity challenges conventional understandings of privatisation and marketization and the bi-polar and unilinear assumptions that underpin these. An important development is to conceptualise 'hybridisation as a contested process' rather than as a static description and to uncover 'institutional logics' which underpin varied organisational responses to common external pressures (Mullins et al., 2013; Morrison, 2016b). Following Powell and DiMaggio (1991), Morrison (2016a, p. 899) defines institutional logics as 'the rules, norms and beliefs, explaining what can and cannot be acted upon'. Institutional logics provide a way of conceptualising the understandings that underpin variable responses by organisations to external constraints and resources, and relate these to broader belief systems (Scott, 2001; Thornton, 2014).

Using these conceptual advances it is possible to avoid three common assumptions about the influence of state, market and community in third sector organisations. First the assumption of an inevitable shift in power from community and state to the market is challenged by the possibility of mission-led responses to state contract opportunities, for example in the English homelessness field (Buckingham, 2012). Second, while the scenario of 'monstrous hybrids out of control' (Koppell, 2001) has captured attention, there are many examples where state influence and direction has not

diminished even when dependence on state funding is drastically reduced. Nieboer and Gruis (2016), for example, have shown this in their account of the 'shifting back and retreat' of Dutch housing associations in response to renewed state direction and control after over a decade of apparent 'independence'. Third, hybridity in the third sector is more than a contest between the two poles of state and market. Some third sector organisations retain distinct identities and community links and consciously decline opportunities that would diminish these identities (Buckingham, 2012). They may also draw in resources as a result of their independent status (e.g. through volunteering and charitable funding) unavailable to state or market competitors (Mullins & Acheson, 2014).

Hybridisation in non-profit housing

Having introduced the broad context for the paper we now consider the specific position of non-profit housing organisations and hybridization, building on a growing body of evidence (Mullins & Pawson, 2010b; Czischke et al., 2013; Mullins et al., 2013; Blessing, 2012; 2014; Milligan et al., 2013; 2015; Morrison, 2016a; 2016b)

Recent work on housing hybridisation highlights the importance of empirical investigation at multiple levels, capturing external influences and organisational responses informed by values and logics. This work addresses criticisms of hybridity as an empty concept lacking analysis of causes and consequences (Skelcher & Smith, 2015).

Mullins and Pawson (2010a) outline the long-term transformation of English housing associations first through public funding, and later through private borrowing, with the sector still retaining a mix of state, market and community influences. Housing stock transfer associations in England exemplify one hybrid form known as 'enacted hybridity' (Billis, 2010, p. 61) where governance structures were designed from the outset to represent state (local authority), community (tenants) and market (expertise and skills) influences (as opposed to 'organic hybridity' that emerges through more gradual engagement with state and market over time). Smith (2010) explored enacted hybridity within US housing non-profits where hybrid governance structures were purposefully adopted to separate commercial (e.g. a certain profit level) and social objectives (e.g. housing a number of low-income households). Meanwhile in the Netherlands Gruis (2008) showed how Dutch housing associations once developed integrated commercial and social strategies based on cross-subsidy of the latter by the former.

Some of the concrete themes in the hybridisation of non-profit housing include governance, decision-making, resource allocation, asset sales, cross-subsidy and the balancing of commercial and social goals. Sacranie (2012) explored decision-making on investment in community initiatives by a

large English housing association; and identified shifts from community logics towards corporate commercial logics reflecting hybridisation towards more market based influences. Blessing (2012) explored the construction of hybrid status and identities in non-profit housing organisations in Australia and the Netherlands, concluding that ‘social entrepreneurship is not a super-blend but a balancing act’ (Blessing, 2014, p. 47). Morrison explored two important processes of hybridisation of English associations involving asset sales (Morrison, 2016a) and engagement in market rent activities (Morrison, 2016b); highlighting how different organisation’s hybridisation trajectories reflect underlying institutional logics and values. Moore (2017) unpacks the construction of hybrid identities within corporate governance of English housing associations. Differences of view about what constitutes governance highlight the role of paradox, uncertainty and negotiated paths of hybridisation.

From this discussion we can identify three positions on the relative role of the state in influencing non-profit housing organisations:

- i) a unilinear privatisation process in which the state cedes assets and influence to the market (see Ginsburg, 2005);
- ii) hybrids, once created as delivery agents by the state, have taken on such a momentum of their own that the state loses control over them (see Koppell, 2001);
- iii) a situation in which hybrids respond to (competing) state, market and community influences in an ongoing process of adaptation driven by institutional logics and values (see Morrison 2016b).

Following our analysis and reflection we return to consider the relevance of these three positions in the concluding section.

Context

This section provides an essential overview of the main contextual differences between the three jurisdictions included in this study. It is important to include because it provides a context for the panel survey results and their meaning. It is organised to consider for each country the sector size and profile from which the panel¹ was recruited, central elements of organisational hybridity - i.e. business model and diversification - and recent system changes.

¹ The panel for each country comprised organisational leaders who agreed to participate in the survey and follow up interviews (see also Table 2).

Sector size and profile

Australia, England and the Netherlands differ substantially in terms of housing systems and institutions. Housing policy and regulation are determined by unitary governments in England and the Netherlands and by two levels of government in the Australian Federation.

Housing associations' share of the national dwelling stock is 30% in the Netherlands, 10% in England and 1% in Australia (see Table 1).

Table 1 Tenure mix in the three investigated countries

	Australia (2011) %	England (2015) %	the Netherlands (2015) %
Owner-occupied*	68	63	56
Public rented	4	7**	-
Other non-profit rented***	1	10	30
Private rented	27	20	14
Total	100	100	100

* both with and without mortgage

** includes rented from local authorities (7.0%) and other public sector dwellings (0.2%)

*** includes housing associations in England and the Netherlands, and community housing providers in Australia.

Sources: ABS (2012); Steering Committee for the Report on Government Service Provision (2014), Tables 17A.7 and 17A.8; CBS (2016), p. 11; DCLG (2015), Table 3.

Not only are not-for-profit (NFP) housing sectors much larger in England and the Netherlands than in Australia, but individual providers typically manage much larger portfolios. In Australia the average number of tenancies managed by community housing providers (CHPs) remains below 100, although by 2014 there were at least 20 organisations with more than 1,000 properties in management, with these landlords together responsible for over 40,000 homes – some two thirds of all sector dwellings (Gilmour, 2014). In England, by contrast, the average stock holding in 2010 was 1,800, while the largest 100 providers (those with at least 5,000 homes) controlled 73% of all sector stock, and four entities each owned more than 50,000 homes (Pawson & Sosenko, 2012). In the Netherlands the average number of homes per HA had risen to 5,600 by 2008, having almost doubled since 1997 mainly as a result of organisational mergers (van Bortel *et al.*, 2010).

Business models and diversification

Most large HAs in England and the Netherlands have long experience of housing development, in some cases on a significant scale. In the Netherlands, housing development has been fully privately funded since the abolition of 'bricks-and-mortar' subsidies and the simultaneous amortisation of state loans in the 1990s (e.g. Priemus, 1996). Subsequently, many Dutch HAs became reliant on commercial activities to generate income to cross-subsidise their social housing and wider urban development plans. However, in recent years there has been a 'shifting back' from commercial strategies in response to a mix of state and market drivers to be discussed further below (Nieboer & Gruis, 2014). In England a similar shift in the balance of funding from public subsidy to private loans has occurred; by 2013 public subsidy of £45 billion had been overtaken by private debt amounting to £52 billion (HCA, 2013). Thus, capital investment is now substantially underpinned by private finance in these two countries, and many associations are highly geared and, therefore, exposed to significant financial risk. In order to manage such risk and to deploy more complex 'investment products' organisations have necessarily developed highly sophisticated business planning and treasury management capacities. In contrast, Australia's relatively youthful CHP sector, has until recently been more involved in property management than in ownership. However, property construction and ownership as well as management were boosted by two large scale national government initiatives, the Social Housing Initiative (SHI) and the National Rental Affordability Scheme (NRAS), which operated from 2008 to 2012 and 2014, respectively. Both schemes enhanced partnerships and financial literacy in the sector (KPMG, 2012; Blessing and Gilmour, 2011).

Diversification into non-social housing activities is also well established in both England and the Netherlands. In England, almost half (46%) of homes funded for construction by social landlords in the period 2008/09-2010/11 were designated for 'intermediate rent' or low cost sale (Pawson & Wilcox, 2012, Table 2.4.2). Since the 1990s, many of England's HAs have sought to transcend their landlord identity to become broader-based social enterprises (Mullins & Riseborough, 1997; 2000). For some, this has included the development of revenue-generating businesses such as care home development and management (Harris & Marshall, 2005). More generally it has involved initiating or supporting 'community investment' and services. Despite this re-positioning as wider social businesses, however, housing remains at the core and rental income still accounts for 80% of revenue (HCA, 2013). In the Netherlands such activities included care, welfare, local economy, employment and education (Nieboer & Gruis, 2014), but were less likely than in England to involve direct provision of wider community services by HAs themselves, being centred instead on commercial or non-residential real estate development (e.g. of health facilities and schools) and facilities management.

In Australia, having a wider community and welfare role is on the agenda of CHPs driven by their interest in contributing to broader social and economic outcomes for their tenants and by potential opportunities for growth, such as the National Disability Insurance Scheme, a major social care reform (<https://www.ndis.gov.au/about-us>).

Recent system changes

All three countries have been impacted by global economic changes and local societal changes that have driven substantial shifts in organisational strategies. In the wake of the 2007 global financial crisis (GFC), HAs in all three countries experienced more volatile and demanding conditions. In England and Australia while public funding was initially ramped up through stimulus investment programs, these proved short-lived and, in the former, longer term patterns of welfare cuts continued. By 2012/13 government grants to HAs in England had been cut by 75% on the peak figure just three years earlier (Perry & Wilcox, 2014, Table 59). However, with capital subsidy per dwelling cut from £51,000 under the 2008/09-2010/11 program to just £19,000 under its successor, the scale of development output by English HAs has been largely maintained. The price of maintaining development under the new regime, however, has been a substantially increased debt burden and the need to charge rents at up to 80% of market levels rather than the 60% typical under the former regime (*ibid.*).

In Australia, recent growth and diversification was primarily driven by the two 2008 Commonwealth Government initiatives referred to above. The SHI was a four year commitment which completed as planned in 2012 and resulted in over 19,000 additional dwellings that are being managed mainly by CHPs for low-income households. The NRAS, based in tax credits (or cash grants to charitable organisations), made around 38,000 offers of funding incentives to both for-profit and charitable providers to procure new rental housing between 2009 and 2014. By the time of its sudden termination in 2014, it had become the primary driver of business development for the larger CHPs in this study by offering them the means to take on a housing development function, to broaden their client base to include moderate income earners and/or to engage in fee-for-service tenancy management for private NRAS investors. However, following the end of these national government supply side measures, growth has stalled, leaving even the largest CHPs below the scale needed for long-term viability and with limited prospects for asset accumulation (Pawson *et al.*, 2013).

HAs have also had to contend with balance sheet challenges triggered by government austerity policies. These took the form of deep cutbacks in tenant social security payments in England under

the UK Government's 'welfare reform' program (Power et al., 2014) including the piloting of direct payments with significant impacts on tenant arrears and rental income streams and, consequently, on borrowing capacity (<https://www.gov.uk/government/publications/direct-payment-demonstration-projects-final-reports>). These issues were specific to the English panel and the Delphi results on this theme are reported in greater detail elsewhere (Mullins & Jones, 2015).

In the Netherlands increased tax exposure has been the major balance sheet challenge (Boelhouwer & Priemus, 2014). The recently embattled state of the Dutch HA sector also reflects deeper political and societal challenges. In general, the social performance of the sector was frequently subject to debate following financial liberalisation in the 1990s. Although there has always been political support for a strong, independent social housing sector, political unease with the lack of checks and balances in the system had grown: HAs were seen as too independent and the supervisory bodies (both internal and external) as too weak to control them effectively. This image was strongly fuelled by examples of high salaries and over-ambitious and risky diversifications that turned out in huge losses (Boelhouwer & Priemus, 2014, pp. 228-229). This eventually resulted in a new Housing Act, adopted in March 2015, which established a strong focus on the provision of affordable housing for low-income households and many restrictions on other HA activities, e.g. restriction of the budget for liveability initiatives, limitations on the development of real estate for non-commercial purposes (schools, community buildings, public libraries, reception centres etc.) and an obligation to obtain a consent from (among others) the local authority for what are referred to as non-Service of General Economic Interest (SGEI) activities (Aedes, 2015). The distinction between SGEI and non-SGEI activities can be seen as a further response to the European Union, which already in 2005 questioned the 'unduly privileged' status of the HAs (Priemus & Gruis, 2011), benefiting from state aid and thus competing unfairly with private landlords. As an earlier response to these 'accusations', HAs were obliged, from 2011, to narrow their allocations policy by designating as their 'target group' households receiving annual incomes of less than around €35,000 (Boelhouwer & Priemus, 2014).

Australia and England have also experienced changes in regulatory approach. Since 2007 Australia's CHPs have been subject to a rapidly evolving regulatory framework, latterly embodied in the National Regulatory System for Community Housing (NRSCH), formally introduced in most jurisdictions in 2014. Under this regime CHPs must comply with an increasingly prescriptive set of criteria, particularly applying to governance and organisational viability. This recent experience has aspects in common with the post-2010 approach to HA regulation in England, where finance and governance (rather than housing services) have become more central to regulatory oversight. There

has also been a shift to 'co-regulation' in which boards are expected to take greater responsibility. There was, however, a general weakening of accountability to tenants following the demise of the Tenant Services Agency. This imbalance between financial and tenant interests seems likely to be challenged in the wake of the 2017 Grenfell Tower fire in London in which over 80 people died (BBC News, June 14 2017). Meanwhile, Dutch providers have found themselves needing to contend with much increased government scrutiny and direction (Boelhouwer & Priemus, 2014) including the transfer, in July 2015, of financial supervision from an independent national body to the national government.

Methodology

The methodology in this paper sets out to capture the shifting influence of state, market and community influences on the policy environment for non-profit housing providers, and on their values and institutional logics and the strategic responses they make (Mullins, 2006a; 2006b). A Delphi survey of appropriate decision makers in non-profit housing organisations (chief executive officers or senior policy analysts) in three countries asked a series of common questions (adapted for contextual differences in policy and language) designed to explore the relative importance of state, market and community drivers and how panellist's organisations were responding to these drivers. Questions were posed on organisational values, strategic positioning, importance of change factors (financial, regulatory and housing market), and adaptation to the changes (in operational management, finance, products and services, cooperation with other parties). Most questions made use of a Likert scale requiring panel member judgements on each of these sets of issues over the recent past and for the next three years. Surveys were complemented by in-depth interviews with a sample of those completing the questionnaire, and documentary evidence to explore the links between changing contexts and organisational responses.

Sample selection followed a broadly consistent approach set out in Table 2. Specific sampling designs were tailored to reflect each local context, as discussed above. Results reported in this paper draw on completed surveys from 74 survey respondents, corroborated and interpreted via 51 follow up interviews. While sizeable numbers of typical organisations were surveyed for each case, the findings are not generalisable in a statistical sense.

Table 2 Organisational sample selection

	Australia	England	The Netherlands	Total
Surveyed organisations	20	31	23	74
Follow up interviews	19 CEOs	20 CEOs	11 Senior policy analysts, 1 CEO	51
Coverage of sector	Purposive sample representative of largest (hybrid) organisations, locational spread	Stratified sample reflecting sector profile by size, region and organisational type	Sample reflecting sector profile by region, financial situation and size of investment obligations	

Prior to interviews panel members were provided with a summary of panel results along with a copy of their own responses. In the interview they were given an opportunity to change their scores in the light of aggregate panel scores, to explain the rationale behind their scoring, to provide further comments on the meaning of panel results and to provide additional information to enable the research teams to contextualise and interpret the findings. The analysis in this paper is based on amended scores and informed by the post-survey interviews.

Final responses to the 2013 surveys in Australia, England and the Netherlands were collated into a common database for storage and analysis. Of the 94 questions common to at least two of the three surveys, 23 questions were judged to be closely related to the hypothesis and themes outlined below and thus became the analytical focus of this paper. Two main methods are recommended for analysis of Likert-type scaled data: for central tendency the preferred measure is the median; for variability the preferred method is a frequency distribution (Boone & Boone, 2012).² These measures are used to report the results below.

Results

For this paper a limited set of themes was used to generate clusters of survey questions for comparative analysis. The chosen themes were related to a core hypothesis that the state has been a key influence on the scope for action of housing non-profits.

Accordingly, four clusters of questions were identified for analysis. These related respectively to:

- i) Values of organisation leaders (particularly public ethos and independence)
- ii) Impact of regulation/state direction

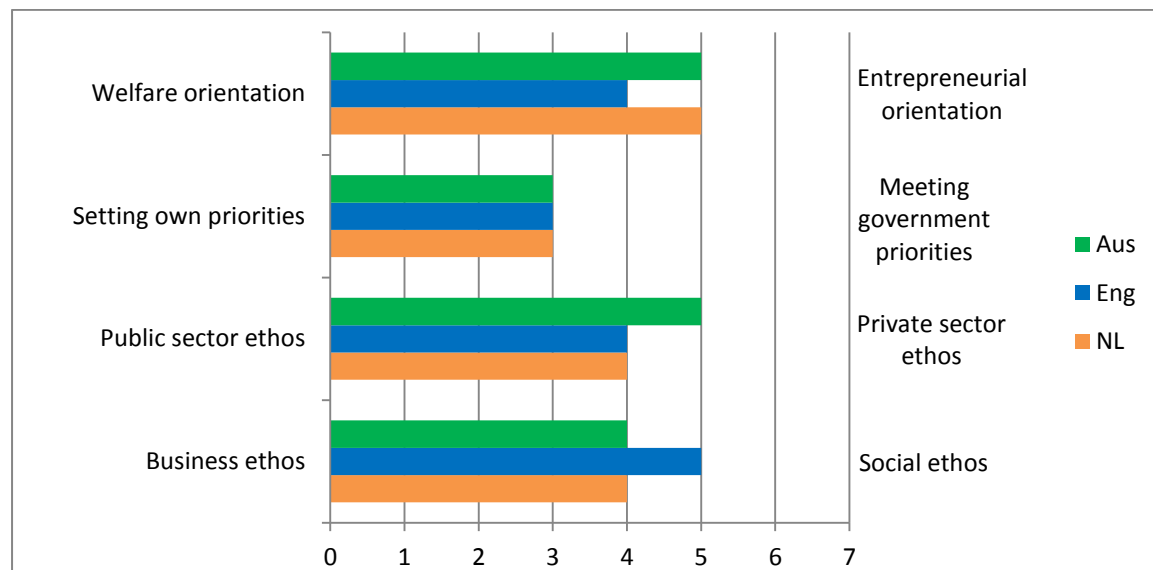
² The scope for statistical analysis with this data is limited, as (i) it has been derived from small (though strongly representative) national samples and (ii) the data is ordinal in nature, meaning the intervals between points on the scale cannot be quantified.

- iii) Balancing state and non-state resources
- iv) Diversification of services/activities

Values

The survey tested the panel members' perceptions of their organisations in relation to various matched pairs of dimensions of hybridity. Median responses to the four most important questions in relation to links to the state are set out in Figure 1. Responses to three of these indicate a distancing from government with panel positioning being towards independence rather than meeting government priorities, having a private sector rather than a public sector ethos, and having an entrepreneurial rather than a welfare orientation. However, the fourth dimension indicates that panel members still see their organisations as primarily social in purpose rather than business. This indicates a more complex transition than a simple move from state (or community?) to market. It suggests that the non-profit status and social purpose of these organisations makes a difference in preserving social values.

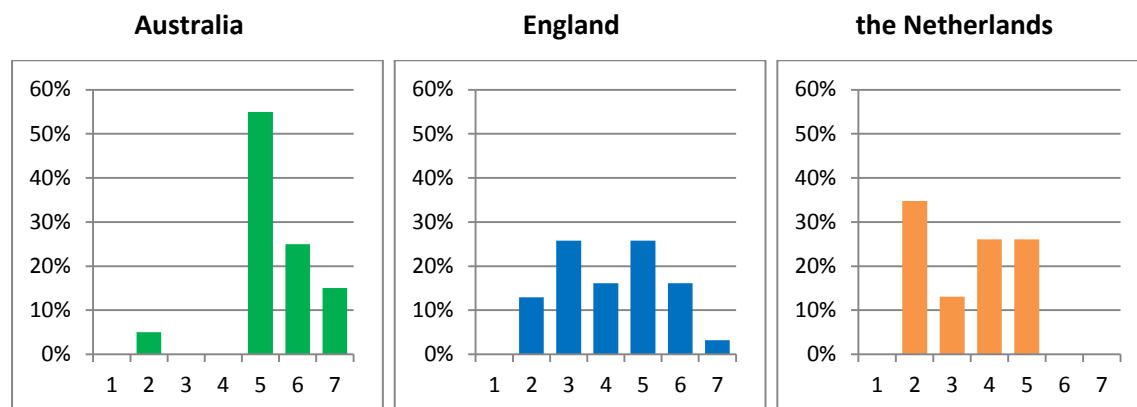
Figure 1 Values of organisation leaders (median scores)



Note: Lower median scores indicate the value proposition shown on the left hand side of the graph was more important, while higher scores indicate stronger identification with the value stance shown on the right hand side. A score of 4 indicates that neither one nor other value prevailed.

There were, however, important variations within and between the panels, as shown in Figure 2 for the continuum between public sector ethos and private sector ethos. While the Australian and Dutch panels respectively were clustered around the private and public ends of the spectrum, the English panel showed more spread.

Figure 2 Panel differences in public sector ethos (left) versus private sector ethos (right)
(distribution of scores)



Note: Graphs indicate distribution of scoring within each national panel. Lower scores indicate that a public ethos was more important to a panel member, while higher scores indicate stronger identification by a member with a private ethos.

In the Australian case, follow-up interviews suggested that panel members were reflecting their recent shift from being singularly reliant on government funding and their aspirations for increased autonomy. A CEO said:

'If your business model for growth is government capital and there is no government capital funding then you don't have a business model...and if this doesn't exist and may not exist in the same sense for a long time, if ever, we need to look at creating a new business model for growth.'

An alternative reading of these findings might be that the stronger 'private sector ethos' reported by Australian CHPs reflects the private ownership domination of Australian housing as a whole (Milligan *et al.* 2015).

By contrast in the Dutch case it seems likely that, after nearly 20 years of 'independence', the public values emphasis is a response to recent challenges to the legitimacy of the sector and to calls for greater public accountability. As a senior policy officer put it:

'We already had a social stance, but our ethos has shifted: less commercial, even more focus on the primary target group.'

Follow-up interviews with the English panel revealed that while some panellists were comfortable with being an arm of public policy (and in receipt of substantial public support) others took a more oppositional stance to certain public policies:

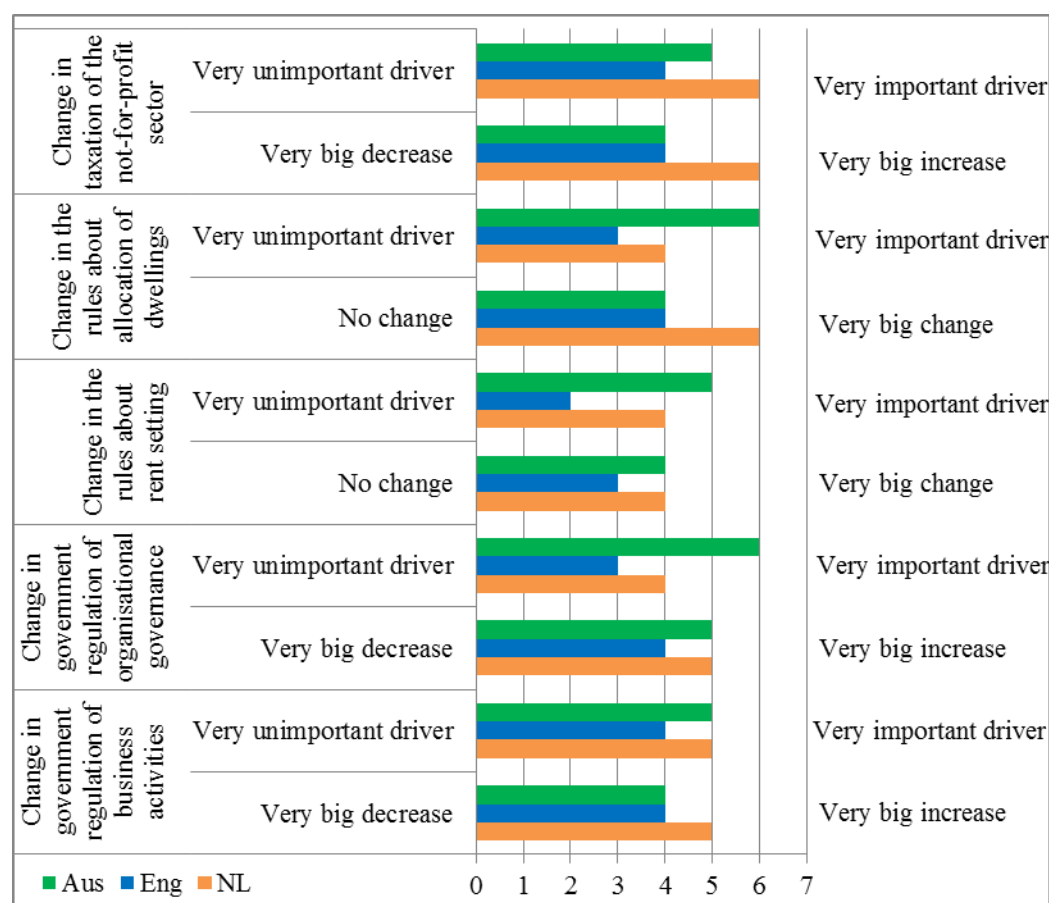
'The key issue is what should housing associations be doing? And they should be serving the public good'

'for me I'm coming toward the end of a career and thinking have I really achieved what I joined this sector set out to do and I'm not sure I have really so need to get louder and more assertive about it...so with our new Chair and the Board we restated our purpose and it's about social justice...and it's the stuff that we do every day.'

Impact of regulation/state direction

A second cluster of responses to the survey indicates the extent to which organisations remain subject to regulation or state direction. Figure 3 shows median scores for each national panel on the perceived importance and extent of change in the last three years for a variety of direct state or regulatory influences. Most measures show a tendency to regard intervention and regulation as important and as having increased. Among the most important interventions in Australia are regulation of governance and letting rules. In the Netherlands interventions perceived to be of most importance concerned changes in allocation rules and taxation, respectively reflecting European Commission and Dutch Government directives affecting the sector. It is such interventions that may help to explain the current strong emphasis of the formerly independent Dutch sector on its public sector identity (Figure 1).

Figure 3 Perceived changes in government Influence in last three years (median scores)



Note: Larger median scores indicate those government drivers that each national panel as a whole considered to have been very important and/or subject to significant change. Smaller median scores indicate government drivers that were considered by a panel to be unimportant and/or unchanged in influence. The direction of change (an increase or decrease in influence) is also indicated where relevant.

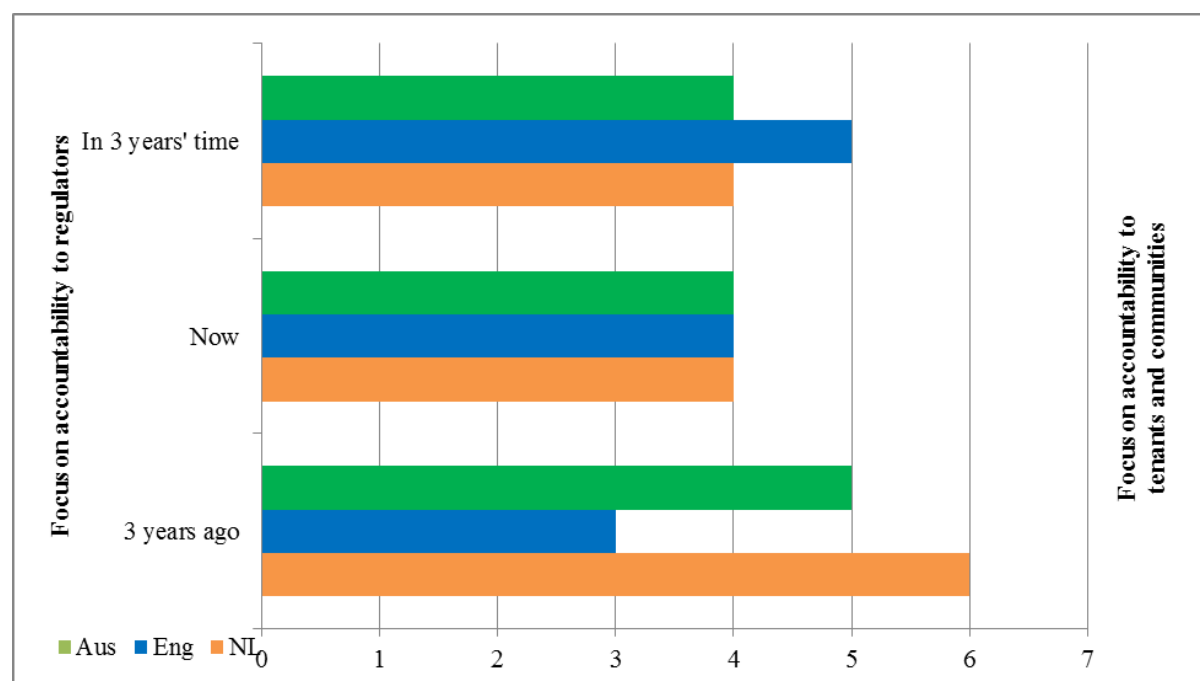
By placing significant constraints on the independent strategic capacity of organisations through their influence on revenue and customer selection, rent setting and allocation policies are key ways in which providers are strongly influenced by government. The Australian sector attached the most importance to these drivers; reflecting conditionality associated with recent public policy such as management transfers of former public housing in some state jurisdictions (Pawson *et al.*, 2013).

‘Organisations...need control of their business ...This is the paradox...we have shown what we can do but we have not been unshackled. Even if we succeed in getting transfers this may not work because of contractual constraints and interference in operations.’ (Australian CHP CEO)

Meanwhile in the Netherlands changes in allocations had become very important in the wake of the policy to designate their ‘target group’ as households with relatively low annual incomes. In the English survey the most important and substantial change in the operating environment observed by the panel was that of welfare reform. This was considered to be a very important and increasing influence by over 70% of the English panel, making it the most highly ranked policy driver there.

Behind the generally common findings on the influence of government on each panel, there are recent differences of experience in relation to regulation, as indicated by Figure 4.

Figure 4 Shifts in Accountabilities to Regulators and to Communities



Note: Larger median scores indicate that panel members as a whole gave greater priority to accountability to other stakeholders at each particular time. Smaller median scores (1-3) indicate greater priority for accountability to regulators in each period.

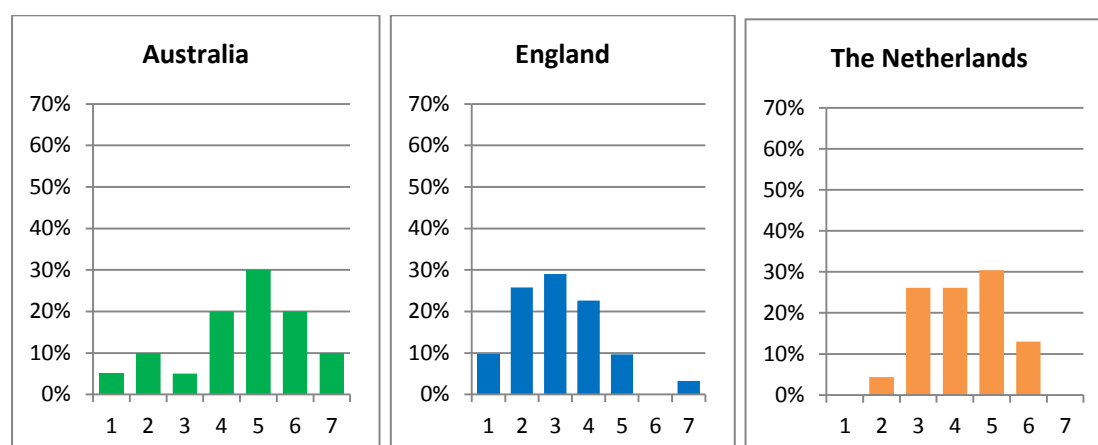
In England accountability was perceived to have shifted from the regulator to other stakeholders while in the Netherlands change was in the opposite direction. A Dutch CEO said:

‘Although we already have a small debt per home, WSW [a national organisation for guaranteeing bank loans to the HA sector] is much stricter than before. We are very dependent on loan guarantees, but we get less of them.’

Similarly in Australia there had been a shift towards a focus on regulation rather than wider stakeholder accountability, reflecting the recent introduction of a new regulatory regime.

A fuller picture of national differences is provided by Figure 5. Despite a decreased focus of the English respondents on regulatory accountability and an increased focus of the Dutch and Australian panels, there remain considerable differences of orientation within the three panels.

Figure 5 Panel differences in focus on accountability to regulators (lower scores) vs. focus on accountability to other stakeholders (higher scores) in last three years



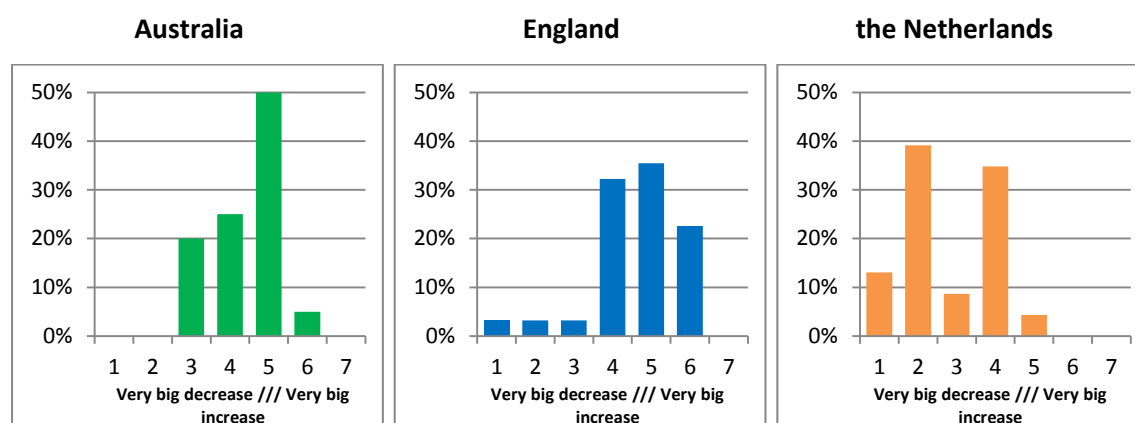
Note: Graphs indicate distribution of scoring within each national panel. Lower scores indicate that accountability to regulators was more important in the last three years, while higher scores indicate accountability to other stakeholders had taken precedence.

Resources

One of the main reasons housing associations engage with the state is to acquire resources; state influence may therefore be related to resource dependence (Pfeffer & Salancik, 1978). In the Netherlands public funding for new capital investment largely ended in the 1990s and both English and Australian providers have faced volatility in the availability and terms of capital subsidy. In Australia the SHI and NRAS schemes boosted the sector after 2008, but were declining by the time the panel was convened. In England, the National Affordable Housing Programme (NAHP) 2011-15 introduced significant funding changes with much lower levels of grant per home and requirements to supplement grant by drawing on reserves and surpluses, charging higher rents to both new

tenants and a proportion of existing tenants, and selective sales of high value or high maintenance assets. A key impact of the recent Australian and English funding regimes has been to stimulate non-profit providers to explore various forms of cross-subsidy or 'leverage' to risk proof their business models and to enable public funding to go further.

Figure 6 Perceived change in opportunities to cross-subsidise social housing from other activities in last three years (distribution of scores)



Note: A higher score indicates that a panel member perceived an increase in opportunities to cross-subsidise social housing. A lower score indicates a perceived decrease in these opportunities.

Figure 6 shows that in Australia and, especially, in England the balance of views was that opportunities for cross-subsidising social housing from commercial activities had increased. For Australian providers this reflects increased (or newly initiated) involvement in 'affordable housing' provision for working households (e.g. through NRAS) and the emerging opportunity for some CHPs to work their own assets for the first time. Results for English HAs could reflect growing diversification into market rental provision as a result of the requirement to use cross-subsidy to compensate for falling development grants:

'Affordable housing is being driven in a quite different way now. Continued cuts to capital and revenue funding for affordable housing are inevitable....It will get very, very severe. Therefore we become stretched in our thinking about how do we create profits in some products to support other products that need subsidy, because that subsidy is not coming from the State in the future.'

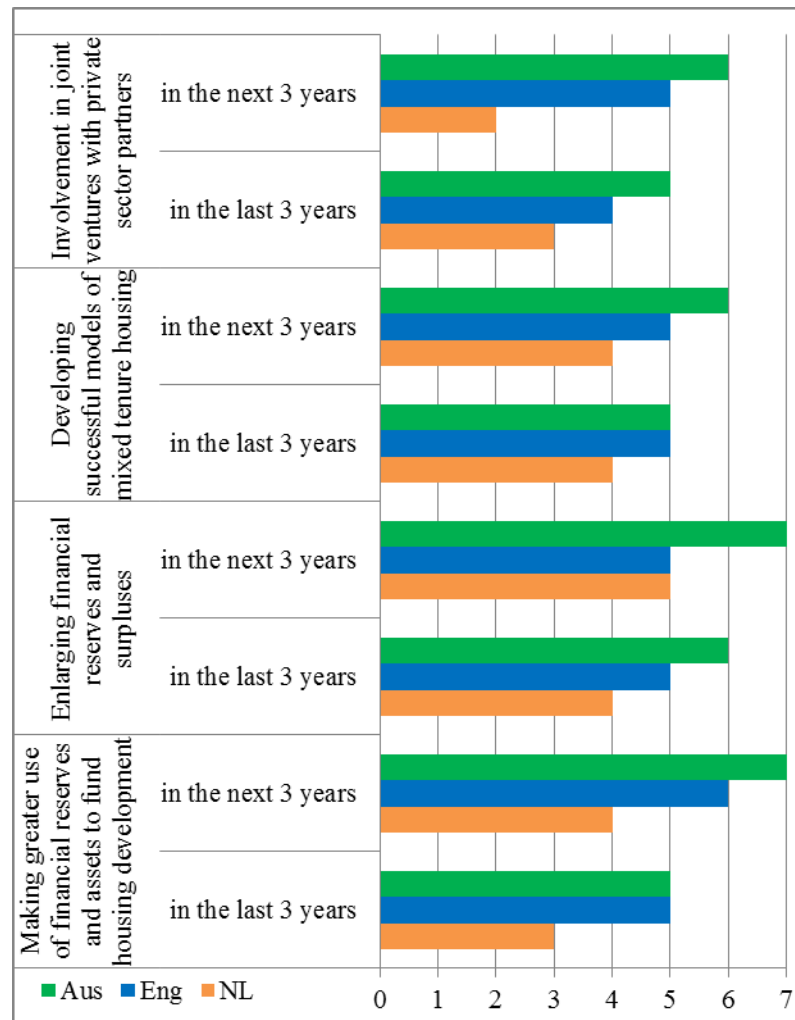
There were, however, clear limits to the potential for cross subsidy as a panellist from the English Midlands indicated:

'We are not diversifying into market rents because in our locality as I'm sure you know affordable rents are not too far from market rent. Our client base is still mainly very low income people.'

More than four out of five Australian respondents and two thirds of English participants considered cross-subsidy or 'leverage' important or very important as a driver of recent strategic and/or

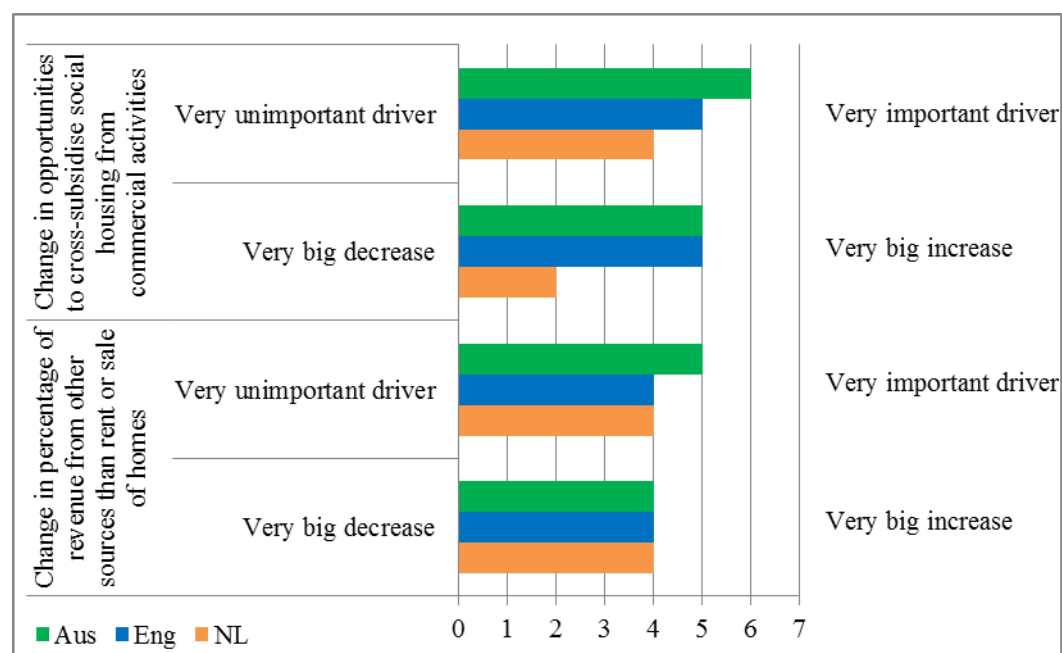
operational direction. The Dutch case shows a retreat from investment compared to the situation in the previous 20 years, when historic state-funded assets were harnessed to cross-subsidise new social housing. The markedly different pattern of responses from the Dutch panel on recent change could reflect the impact of the European Commission competition ruling requiring providers to re-focus on catering for low income households (Priemus & Gruis, 2011).

Figure 7 Specific strategies to harness resources to supplement state funding (median scores)



Note: Larger median scores indicate that panel members as a whole gave priority to the strategy at a particular time. Smaller median scores indicate low priority for a period.

Figure 8 Changes in commercial cross-subsidy and income from non-housing activities in last three years (median scores)



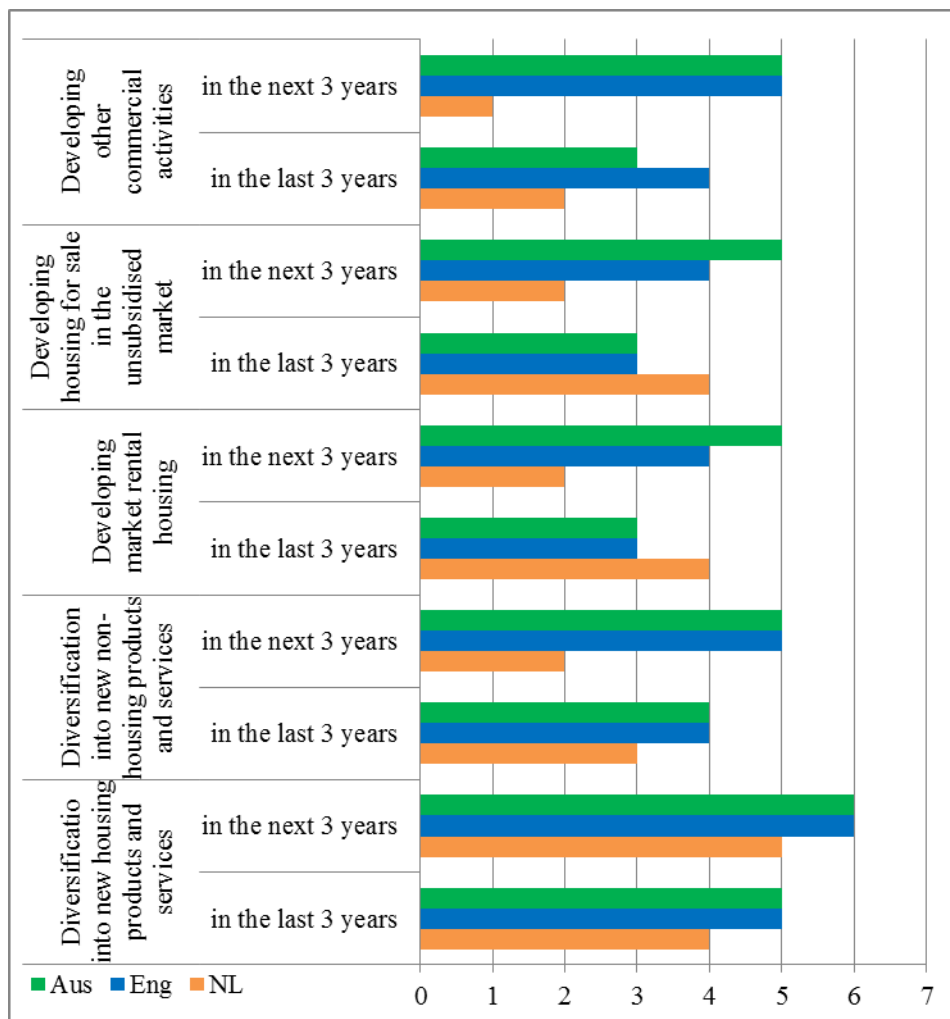
Note: Scores for the first and third row indicate the importance (from 0 'very unimportant' to 7 'very important'). Similarly, scores in the second and fourth row indicate the direction and scale of changes (from 0 'very big decrease' to 7 'very big increase').

Changes in the importance of strategies to harness resources to supplement state funding are compared in Figure 7 and Figure 8. These figures highlight the recent interest by the Australian panel in cross-subsidy approaches such as mixed tenure developments, commercial income, generating revenue from sources other than rent or sale of homes, enlarging reserves and surpluses, and forming joint ventures with private sector partners to invest in additional housing. Despite having had much greater exposure to such cross-subsidy models in the past, English and Dutch panels appear to be considerably more cautious for the future. As confirmed in follow up interviews, responses in Australia are more a function of declining state funding and the desire to keep some development activity going rather than indicating the emergence of a more mature mixed economy strategy, as found in England or the Netherlands.

Diversification

A summary of further evidence of the types of diversification being embarked on or retreated from in the three countries is provided in Figure 9. This confirms patterns discussed in earlier parts of the paper: Australian panellists were most oriented to future diversification opportunities; Dutch panellists were generally narrowing the range of activities in which they were involved; and the English panellists were in-between.

Figure 9 Diversification and retreat, comparing next three and last three years (median scores)

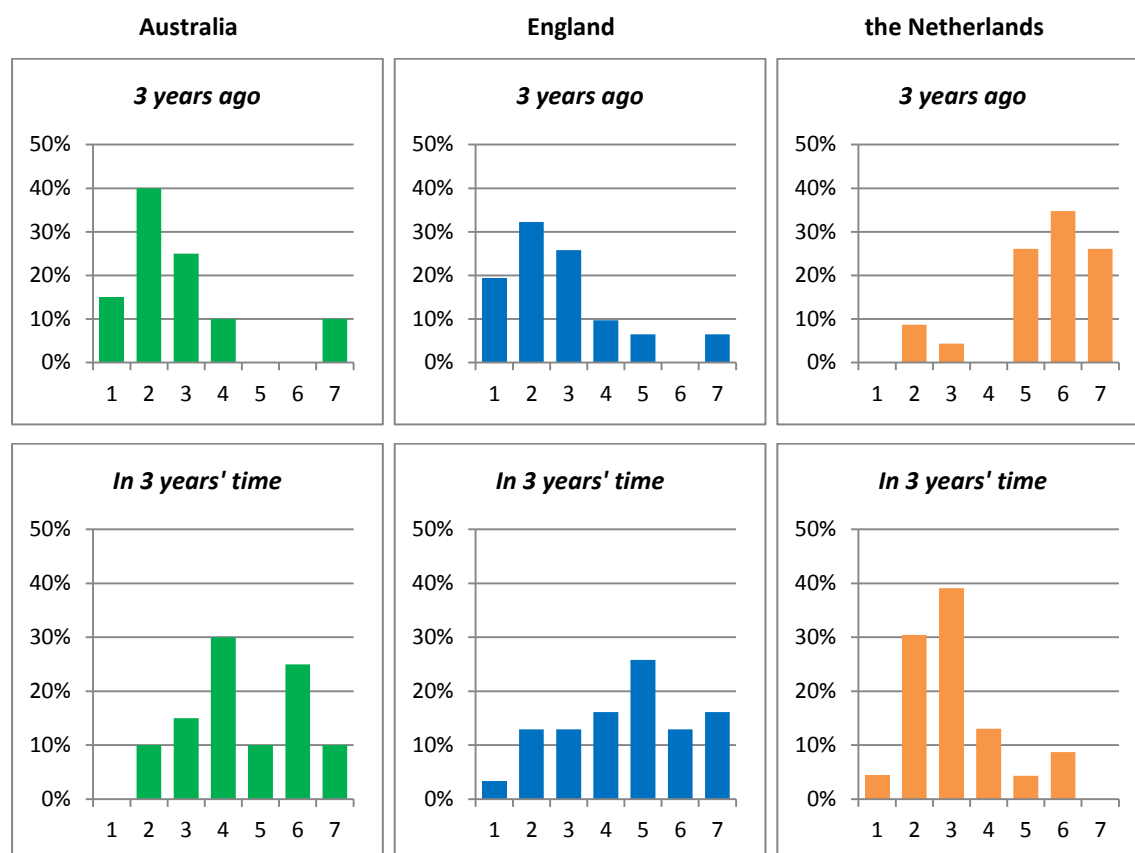


Note: Larger median scores indicate that panel members as a whole gave priority to the strategy at a particular time. Smaller median scores indicate low priority for a period.

A significant consequence of diversification strategies confirmed by the Australian and English panels is a reduced focus on low income groups alone (Figure 10). The different trajectory of the Dutch sector refocusing on low income clientele was required by the state in response to European challenges, mentioned above, about ‘unfair competition’ with private landlords. It may also reflect the more limited investment capacity of Dutch HAs following the GFC and increased taxation that may have made them more risk averse. A Dutch panellist illustrated this shift:

‘Until only a few years ago we invested a lot in activities other than social housing alone. ... We developed a multitude of plans, even for the acquisition of [commercially operated] parking facilities. This has all been abandoned. Now, we intend to dispose of all our commercial, non-housing real estate, unless it has a function for the neighbourhood or generates a sound return.’

Figure 10 Focus on low income groups versus focus on both low and moderate income groups three years ago and in three years' time (distribution of scores)



Note: Graphs indicate distribution of scoring within each national panel. Lower scores indicate a greater focus on low income groups; higher scores indicate a greater focus on mixed income groups.

The move away from an exclusive focus on low income groups in Australia and England is intriguing because it may reflect either government pressure to adopt cross-subsidy or 'leverage' models and/or more strategic decisions by HAs to pursue a wider range of opportunities.

English follow up interviews indicated some of each influence. One English panellist commented:

'We are moving as a sector to a housing provider full stop. We now run Market Rent housing, Shared Ownership and we do open market sale aimed at middle income groups.'

In Australia, panel members (interviewed for an earlier Delphi study in 2012) had indicated this direction was about business viability and not a rejection of their core ethos.

I'm happy ... If I have to have 70 per cent of people who are not homeless housed in my housing, to get 30 per cent who are or could be, that's 30 per cent more than I would've got anyway.

By 2013 the challenge to support additional low income households, however, was becoming more difficult.

‘Without government capital funding, housing associations will bust their guts to get growth but it won’t be growth in housing for people who need it the most.’

Discussion and Conclusions

In this section we reflect on the methods deployed and data collected in the three national studies and draw conclusions on the relationship of hybrid non-profit housing organisations to the state.

Reflection on method

The ‘insider’ responses generated by the Delphi methodology (both the survey and the interviews) provide a rich source of evidence to inform analyses of topics such as the changing relationship of hybrid organisations to the state. Given the novelty of using cross national comparisons of organisational actor data to inform theoretical analysis, it is important to include a reflection on method as part of our concluding discussion.

The data presented here comprises just a small slice of responses at one point in time and organised around a limited number of carefully chosen themes from relevant common questions between the three surveys.

As with any attitudinal survey there are dangers of mis-interpretation or over-interpretation of findings. However Delphi follow up interviews allow for clarification of meanings and, in this respect, have significant advantages over conventional surveys. The relationship between expressed attitudes and actual behaviour also requires validation through triangulation with other evidence. Questions involving past attitudes invoke problems of recall and may require comparison with longitudinal data covering the same topics. While the design of the study with two waves already convened in Australia and the Netherlands enables such comparison, it is not the subject of this paper.

A further potential problem arises with questions about the future, where perspectives may be biased by optimistic or pessimistic outlooks. Again, a key purpose of Delphi is to reduce such biases by allowing mutual adjustment of views by playing back group views to individual participants. However, this may introduce a further danger of groupthink, and there is certainly a hint of this in the strong aspirations for diversification in a number of different directions by the Australian panel despite (and perhaps because of) current resource constraints. A more negative groupthink may be

in evidence concerning future prospects of Dutch HAs, despite those organisations having a mature asset base on a massive scale compared to Australian CHPs. In this context the Dutch sector's pessimistic views belie an apparent advantage in opportunities to work those considerable assets, even in the face of state-imposed constraints and taxes.

Juxtaposition of responses to the three national surveys provides an indication of patterns of convergence and divergence and led to the development of plausible hypotheses regarding underlying processes, such as the one used in this paper on relationships with the state. The research team first approached this task by writing short commentaries on frequency comparisons drawing on their own knowledge. However, fuller interpretation is dependent on a deeper understanding of context and our account therefore begins with a contextual comparison. In an iterative process a richer account of findings informed by and corroborated with panel members can emerge. Interpretation of such data still needs to be approached with caution.

Reliance on single informants from each selected organisation, albeit powerful and knowledgeable ones, is recognised as a limitation of the method. However, by triangulating responses with documentary sources (e.g. organisational annual reports, business plans and websites), and with other academic and grey literature that informed the contextual review we believe that the findings provide a good reflection of recent positioning of housing NFPs in the three national cases. Overall, by building deeper relationships with participants than is usual in surveys Delphi provides a considerable advantage as regards veracity and reliability of evidence. The comparative analysis in this paper is further informed by country level analyses.

Conclusions on the role of the state

Our substantive conclusions concern the continued role of the state in influencing non-profit housing organisations in all three jurisdictions. As outlined below it is state policies that help to explain both divergent and convergent trends across the case studies.

The strikingly different recent trajectories of the Dutch sector on the one hand and the English and Australian sectors on the other can be explained to a large extent by differences in actions of the state in each case. The Dutch retreat from a market hybrid model may be in part be explained by the impact of the GFC on its asset value and on well-established cross-subsidy business approaches. However, the more dramatic aspects of the recent shifting back appear to be more related to changes in public policy towards the sector following its diminished legitimacy with politicians in The

Hague and associated European competition challenges that have seen prescriptions on client groups, heavy taxation of surpluses and the prospects of more to come.

The Australian sector has rapidly embraced the identity of market hybridity, perhaps mainly as a response to the drying up of state resources that had promoted its earlier growth. However, its potential to realise this identity appears to be out of line with existing opportunity, scale and financial capacity. The absence of the role played by the state over a long period in both England and the Netherlands in enabling such scale and capacity to be built up appears to be the major factor in this gap between aspirations and resources. It seems unlikely that public housing transfers in Australia on the terms currently envisaged will do much to bridge this gap (Pawson et al., 2016; Pawson et al., 2013).

Furthermore, there is strong evidence from this research that it is primarily government policies that are driving cross subsidy approaches in England and Australia while undermining them in the Netherlands. Organisations may have their own strategies and motivations for diversification or retrenchment but it is hard to argue that these strategies are not affected by state policies - such as the NAHP in England, the new limitations on who is housed in the Netherlands, or the roll out and roll back of SHI and NRAS in Australia.

The evidence on values suggests a level of buy-in by organisational leaders to the notion of independence from the state and the development of discourses aligned to ideas of social enterprise or related institutional logics (Czischke *et al.*, 2012). However, there is variation within and between panels about how leaders see their organisations' independence from government, and there are distinctions between holding public values in general and opposition to specific public policies, especially in England (see Mullins & Jones, 2015). What comes across more strongly in all three jurisdictions is that many panel members still see their organisations as primarily social purpose or employing business methods for a social purpose, rather than being purely market driven. This is an interesting indication of a more complex transition process than a simple move from state to market and reflects the continued importance of social and community drivers within the hybrid identities of these non-profit organisations. We consider that this is quite different to what would have resulted from direct privatisation of social housing into the ownership of profit distributing organisations.

Evidence on regulation and state direction suggests that in all three countries HAs still experience quite high levels of state control over their income stream and customers; particularly through rent setting and allocation policies but also through personal housing allowances and supply-side subsidies. Increased taxation of HAs is a particularly strong driver of business changes in the Netherlands, and restored state control over Dutch HAs allocation policies is a strong regulatory pressure. In England the steadier advance of market hybridity has been both stimulated and, more recently, challenged by changes in state strategies in relation to welfare reform, new development funding and welfare conditionality. In Australia the biggest driver has been withdrawal of capital subsidies. There are different experiences in relation to regulation and accountability, but business regulation focused on finance and governance has been an important recent influence in England and Australia.

The discussion above has drawn together the evidence on the role of the state from the survey and interviews to answer our two research questions, and thereby enabled us to contribute to the theoretical debate on the role of the state within the three non-profit housing systems. This leads to our conclusion that both research questions can be answered in the negative: there has **not** been a unilinear shift in power away from the state to market and reduced resource dependence on the state has **not** led to less state direction of housing non-profits in the three countries.

Despite the rhetoric of independence from government and the discourse of social enterprise, the relationship of these hybrid organisations with the state has continued to be a key influence on their scope for action and the extent of hybridisation in each country studied. Despite the shift to market forms of hybridity, the state retains a more important influence than might have been predicted on the basis of developments before the GFC. State influence and control remains a key factor shaping the scope and action of these hybrids. This supports a contested logics model (Morrison, 2016b) rather than either an out-of-control monstrous hybrids notion (Koppell, 2001) or a linear privatisation model (Ginsburg, 2005).

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