



The importation of social mix policy in Italy: A case study from Lombardy



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ABSTRACT

The proliferation of quasi-market rental models has characterised the rearrangement of housing policy in Italy. These new models aim to differentiate the supply of social housing by including groups from the middle class, and to remedy the traditional public housing system's tendency to produce spatial concentrations of low-income population. They are thus associated with the notions of tenure diversification and 'social mix'. This analysis focuses on the rearrangement of housing policy in the context of Bergamo, by analysing the implementation of a new social housing model, namely 'moderate rental', and evaluating its effectiveness as a tool of tenure diversification within neighbourhoods characterised by high concentrations of public housing apartments and low-income households.

1. Introduction

During the past two decades, Italian housing policies have faced a transition towards a new housing regime (Cremaschi, 1999). On the one hand, this process has been accompanied by the shrinkage of public stock and the state's retrenchment from this policy field. On the other hand, normative innovations have led to the creation of a social housing market, giving rise to both a proliferation of private actors involved in policymaking (especially non-profit actors) and a diffusion of new solutions of quasi-market rental housing.¹ The latter have been justified by the need to diversify the supply of social housing in order to solve the traditional limits of public housing in terms of tenure homogeneity. The new quasi-market models have thus aimed to target specific middle-class groups that struggle in accessing the rental market.

As a key component of area-based programmes, these models are presented as drivers of tenure diversification, being formally addressed to reduce the spatial concentration of poverty through attracting middle-income inhabitants into public housing neighbourhoods as a way of pursuing a social mix. In the European context, the social mix appears as a long-standing policy goal (Bolt, 2009). Nevertheless, the effectiveness of social-mix policies remains an issue within the scientific debate (Arthurson, 2012; Bolt, Phillips, & Van Kempen, 2010; Graham, Manley, Hiscock, Boyle, & Doherty, 2009; Musterd & Andersson, 2005; Van Ham & Manley, 2009). More recently, contributions have started to bridge the gap in the literature regarding the importation of these policies within the Italian context, mostly focusing on the regional context of Lombardy. However, they almost exclusively addressed the case of Milan, while social-mix policies in other smaller urban contexts were *de*

facto not taken into consideration.

This article aims to contribute to this research niche by analysing the reshaping of housing policy in Bergamo, Lombardy's middle-sized city. After having retraced the recent transition towards a new arrangement of housing policy, the paper focuses on the implementation of new social housing projects within Bergamo's peripheral areas, investigating the functioning of a specific quasi-market model, namely moderate rental. The analysis concerns this model's capacity to pursue the goal of social mixing by meeting the expected middle-class demand in neighbourhoods characterised by high concentrations of public housing.

2. The debate on social-mix policy

In the context of the European Union, combatting social segregation through promoting social-mix policies appears as a long-standing policy goal (Bolt, 2009; Goodchild & Cole, 2001; Graham et al., 2009; Veldboer, Kleinhans, & Duyvendak, 2002). Social mix has been presented as a solution to solve the negative effects of the concentration of the low-income population, especially within public housing neighbourhoods. Four key factors may be listed in synthesising the policy-makers' arguments in favour of social mixing (Bolt et al., 2010): 1) it is seen as a way to increase opportunities for housing careers within the area of intervention; 2) it promotes social cohesion; 3) it promotes the social capital of its population and 4) it promotes cultural integration as a result of planned dispersal. Nevertheless, an increasing body of literature has questioned the internal and external consistency of social mix, stressing the lack of empirical evidence to justify the effectiveness

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¹ The paper refers to 'public housing' to indicate State-provided housing, while 'quasi-market rental housing' is exclusively adopted to indicate the new market-oriented models of social housing.

of its related policies (Bolt, 2009) as well as, in some cases, going so far as to reconceptualise the concept of social mix as an ambiguous rhetorical construct (Bolt et al., 2010; Bricocoli & Cucca, 2014; Graham et al., 2009). Moreover, in the European context particularly, other studies adopting longitudinal data sets have discussed the efficacy of tenure diversification in modifying a population's conditions (Graham et al., 2009; Van Ham & Manley, 2009), questioning the relationship between housing mix and social mix and the consequent creation of better opportunities for individuals (Musterd & Andersson, 2005). To the contrary, a comparison among five European countries has even pointed out that social-mix policies may produce negative effects by weakening the community's social bonds, as well as constraints on individual housing choices (Bolt et al., 2010).

In Italy, research studies referring to social-mix policies have mostly been focused on Lombardy, with specific reference to the case of Milan (Agustoni, Alietti, & Cucca, 2015; Bernardi & Boni, 2015; Briata, 2011; Bricocoli & Cucca, 2014; Mugnano & Costarelli, 2015), where the first implementations date back to 2000 and a public discussion on social mix took place since the end of the 1980s (Bricocoli & Cucca, 2014). Lombardy thus represents a prime observation point for tracing the importation of social-mix policies in the Italian context, as well as the only regional context in Italy in which a scientific debate has *de facto* arisen on this topic.² However, this debate does not currently look beyond the case of Milan. The importation of social-mix policies into smaller urban contexts of Lombardy have not yet been taken into consideration, probably because of the fact that they have been imported more recently in those contexts. Nonetheless, research studies on these contexts may provide important information on the way social-mix policies are regionally being “naturalized”. Then, the present study aims to bridge this gap, strengthening knowledge about the implementation of social-mix policies in Lombardy's middle-sized city of Bergamo.

3. From public housing to the social housing market

The expansionary phase of Italian public housing, which started from the second post-war period, came to an end in the late 1970s, when the transition towards a new housing regime occurred (Cremaschi, 1999). This change was characterised by three main processes: 1) at the end of the 19,980s, all the competencies in the matter of public housing began to be transferred towards the regions; 2) any rent control regulations were abolished in 1998; 3) about 15% of regional public housing stock was alienated after 1993 (Federcasa, 2015) and the GESCAL public fund was dismissed in 1998, eliminating the primary source of funding for public housing. As a result, the public housing stock now accounts for less than 5% of the housing system (*ibidem*).

This change was therefore accompanied by processes of horizontal and vertical subsidiarization that led to wider welfare restructuring (Kazepov, 2009), which favoured a concomitant process of contractualisation (Bifulco & Vitale, 2006). Firstly, since the end of the 1970s, a process of decentralisation was progressively transferring planning functions in the housing sector to the Regions; and it came to an end in the late 1990s. Secondly, since the 1990s, private investment became a basic factor in providing social housing by multiplying the private actors involved in public action. Thirdly, this arrangement made more prominent the role of the city council, which is charged with bargaining with both the private actors and with higher levels of government. In this context, the state has maintained the capacity of indirectly shaping public action (Lascoumes & Le Galès, 2009),

² However, Lombardy is not the only regional context in which social-mix policies have been implemented. In Piedmont, in example, Turin was one of the most important laboratories of urban regeneration since the second half of the Nineties (Guercio, Robiglio, & Toussaint, 2004; Sclavi, 2002); in this context, remarkable experiences on social mix also took place especially after 2006 Winter Olympic Games (Olagnero, 2012).

assuming a new role of enabler.

These processes of subsidiarisation corresponded to the marketisation of the social housing sector. Social housing is now defined by law as a ‘general interest affair’, where public and semi-public providers are equated with private ones within a new social housing market. In this perspective, Social housing is intended as a planning standard, which is delegated to public-private negotiations at a local level (Urbani, 2010).

At the same time, since the beginning of the Nineties, a new generation of complex urban programmes was introduced, stimulating a scientific debate about their innovative features (Avarello & Ricci, 2000; Cremaschi, 2001; Ombuen, Ricci, & Segnalini, 2000; Saccomani, 2004). It is not possible to analyse every single type of these programmes here, but they have four main lines of action in common (Bricocoli, 2002) which can synthetically be resumed: 1) integrated approaches combining economic, social and planning policies; 2) public funding through open competitions; 3) public-private partnerships; 4) the participation of local stakeholders, with a view to triggering dynamics of local development. These complex urban programmes became main channels of public funding (Tosi & Cremaschi, 2001) and key instruments in the field of housing policy – where the interventions started to primarily address the regeneration of existing public housing neighbourhoods.

Tenure diversification was intended in this new context as a way to positively affect the social composition of public housing neighbourhoods. This new policy orientation has thus been associated with the proliferation of housing models which integrate the traditional solution of public housing with introducing new solutions of quasi-market rental and rent-to-buy housing. These solutions formally aim to extend the social housing supply to the lower middle classes in order to overcome the traditional limits of public housing in terms of concentrations of low-income households. As a key component of area-based programmes, the mixed supply of social housing is thus aimed to mitigate these concentrations, especially within mass housing neighbourhoods.

In Lombardy, housing mix was normatively introduced by Regional Regulation 1/2004. It orders social housing providers to integrate 30% of specific social categories into both the new social housing estates and the refurbished ones. The aim of promoting social mix through mixing different housing models is defined as a formal objective explicitly meant to prevent a concentration of poverty:

It has answered the new housing demand by introducing a rule aimed to prevent ghettoization within poor neighbourhoods and permit the housing mix. Public tender will answer to specific social categories (the elderly, youth and one-parent households) in the amount of 30% of new estates or interventions of housing restoration.

(Regione Lombardia, 2011, p. 2).

4. Restructuring public housing through social mixing

4.1. The case of Bergamo

This study focuses on the reshaping of housing policy in Bergamo, analysing the implementation of a new quasi-market model, namely moderate rental, introduced by Regional Law 27/2009. This new model targeted specific categories of middle class: it was adopted as a tool to promote tenure diversification within peripheral neighbourhoods characterised by concentrations of public housing.³ Combining qualitative⁴ and quantitative methods, this analysis evaluates the capacity of

³ State-provided housing and quasi-market housing are accessible to candidates with an ISEE-ERP (Indicatore Situazione Economica Equivalente – Edilizia Residenziale Pubblica; Equivalent Economic Situation Indicator – Public Housing) income which is lower than 16,000 euros.

⁴ Although the major part of this research is based on quantitative data analysis, in-

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