IV. CASE STUDY: Turin. Exploration of Turin: context and trends of social exclusion, forms of coping and innovative community solutions.

SMARTDEST

CITIES AS MOBILITY HUBS:
TACKLING SOCIAL EXCLUSION THROUGH
'SMART' CITIZEN ENGAGEMENT

D3.2 Technical Report: "Selection of the 2nd set of case study cities"

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HORIZON 2020

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Task 3.2.

Engagement of the second set of ´case study cities´

Preface

Work package 3 (WP3) of the SmartDest Project aims at analysing mobility-related processes of exclusion in eight case studies and local strategies to tackle them. Moreover, the ecosystems of the destinations are investigated using a multi-method research approach. T3.2., a sub-task of WP3, is an exploration of possible case study cities including a process of selecting the four most promising cases (the second set). The task extended over a three-month period, starting in project month 9 (September 2020) and ending in month 12 (December 2020). Based on research from WP2, a list of relevant European tourist cities has been created and presented in an online meeting on September 29th, 2020. The planned steering group meeting in Vienna (in M9) was canceled due to the travel restrictions caused by the pandemic. Next, a shortlist of potential case studies was compiled grounded on certain criteria of priorisation such as geographical and morphological diversity (socioeconomic, cultural, and related governance regimes), patterns of urban inequality associated with forms of (tourism) mobility and accessibility and familiarity of a city to the project partners in charge. Edinburgh, Lisbon, Ljubljana and Turin were selected, and the local project teams engaged with public and private stakeholders to ensure their participation (in the city labs and through sharing data). Furthermore, a critical place-diagnostic of all four second case studies was drafted by the project partner teams (USTRAT, IGOT, UP, POLITO) to explore the cities and demonstrate their relevance. In those diagnostics, the centre of attention were the local contexts and trends of social exclusion, the different forms of coping and the innovative solutions that developed there. The initial and broad place-diagnostic revolving around those elements takes the form of a research report, which provides a good understanding of the cases and informs the next tasks of WP3. Those four case study reports are collected in deliverable 3.2 (D3.2.). Generally, the research in T3.2. aims to cover the developments in a 20-year timespan (2000-2020).

T3.2. builds on a guideline produced by the task leader (UNIVIE) and scrutinised by all involved partners. It set the structure and direction of the investigation and tried to balance standardization and free case exploration. In addition, the guideline provided a structure for the case reports and introduced "timelines" as methods to visualise events over time. The partners were asked to develop timelines that depict the most relevant and tourism-related events in their cities. Identifying those key events helps to spot and understand critical junctures in the history.

The reports of T3.2 consist of a general, contextual section covering the political, economic and social situation in the case cities; and an issue-focused section that analyses tourism-related problems, involved stakeholders and mechanisms of coping. Moreover, the partners indicated future methodological strategies that they want to pursue in the empirical research of WP3. At

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the end of the report, there is a short recap of the current tourism status under the COVID-19 pandemic. This report structure is similar to the one used in T3.1 for the first set of case studies. The standardization allows a certain degree of comparability and helps to focus the attation on a few relevant issue areas.

Over the duration of T3.2., two online meetings with all involved partners were held and a few more in smaller groups. Furthermore, there was an intense monitoring activity and feedback exchange ensuring a high-quality output. While broadly following the predetermined structures, the case reports are heterogeneous in order to accommodate the significant differences across the case study cities.

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I. CASE STUDY: Edinburgh

Exploration of Edinburgh: contexts and trends of social exclusion, forms of coping and innovative community solutions

Authors: USTRAT (Tom Baum, Kendra Briken, Pratima Sambajee, Donagh Horgan)

Introduction

The contextual dimensions and the main trends

Edinburgh has long been a location of interest to tourism researchers (see, for example, Parlett, Fletcher and Cooper, 1995 and their assessment of the economic impact of tourism growth in Edinburgh Old Town). It remains of considerable interest in particular given that Scotland has begun to experience the global phenomena of high visitor numbers in certain areas, focusing negative opinion on impacts on the city of Edinburgh (Scottish Tourism Alliance, 2020). Local communities have been vocal in their criticisms, well documented in international press, such a Financial Times article quoting Situationist Guy Debord, *"In societies dominated by modern conditions of production [...] life is presented as an immense accumulation of spectacles. Everything that was directly lived has receded into representation"* (Heathcote, 2020).

Assessing the last 20 years in the development of social in- and exclusion it is crucial to understand how the City of Edinburgh is situated. Scotland is one of the four nations forming the UK. During a referendum in September 1997, Scottish people voted for devolution. In 2014, a referendum on Scottish independence was held and the proposition in favour of independence was rejected by 55% to 45%. However, this outcome has not ended debate on independence and pressure remains to revisit this issue, particularly in light of BREXIT and the global pandemic. From a Scottish tourism perspective, it is difficult to assess whether independence would benefit or damage the country and its main cities, including Edinburgh (Hay, 2016) although there is evidence that increased devolution from 1997 led to a growth in direct international air transport routes to and from Edinburgh. Following the passing of the Scotland Act in 1998 the Scottish Parliament was established in 1999, transferring powers that had been previously held at Westminster. While the Scottish Government cannot make laws in reserved areas there have been a number of developments since then, including the 2012 Scotland Act - which provided the largest transfer of financial powers from Westminster since the creation of the UK - and the 2016 Scotland Act, which devolved further powers in areas of income tax and welfare (UK Government). With regard to our project this is crucial in some respects:

a) *Impact on Edinburgh in terms of housing, new city development around government/parliament estates; housing markets might have been impacted?*

b) *Employment and Immigration are reserved matters, so initiatives from examples led by Trade Unions in regards to impacting on the development of employment law need to address Westminster and can't be handled in Scotland.*

c) *Migration figures might include migration from England*

d) *With Edinburgh becoming a new political centre this has also impacted on skill mixes and added service chains (catering and hospitality for example)*

As we can see with the table below (*Table 1*), the choice of stakeholder hence has a regional flavour, considering the level of devolvement.

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Devolved matters: Scottish Government	***Reserved matters: UK Government***
Agricultural, forestry and fisheries	Macroeconomic and fiscal issues
Education and training	Foreign policy and international relations
Environment	The Constitution
Health and social services	Defence and National Security
Housing	**Employment**
Land use planning	Equal opportunities
Law and order	Broadcasting
Local government	**Immigration**
Sport and the arts	Trade and industry, including international trade
Some forms of taxation	Many aspects of benefits and social security
Many aspects of transport	Financial services and pensions

Table 1: Devolved and reserved matters in Scotland. Source: Author's elaboration, 2020.

Interesting, in the context of this discussion, is that tourism has, in part, been a devolved matter since the UK-wide Development of Tourism Act came into force in 1969. The Act gave what had been the voluntary Scottish Tourist Board (the STB) a statutory basis upon which to develop and market tourism in Scotland. STB was the predecessor organisation to VisitScotland which continues to perform these roles today.

This report first provides context as to the development of Sustainable Tourism in Edinburgh, indicating the impact of policy and governance. Tt goes on to discuss issues affecting the nature of overtourism and social exclusion in contemporary Edinburgh – precarisation, platformisation and festivalisation -mindful of recent impacts from the Covid-19 pandemic.

Sustainable Tourism in Scotland

2019 was the best year for overnight tourism in Scotland over the last decade, with an increase of about a sixth in visitor numbers and spend. Data indicates a much stronger rise in domestic tourism. Compared to 2018, Scotland was less popular for international travellers with a reduction of 7% in trips (Visit Scotland, 2020). Prior to the global pandemic, the UK ranked 8th in the world for international tourist arrivals, 7 percent of which were trips to Scotland (Scottish Government, 2018). 2018 saw more than 15.5 million overnight visitors to Scotland, including 3.5 from overseas (Scottish Tourism Alliance, 2020). Spending by total visitors in Scotland was estimated around £10.4 billion, generating £12 billion in the wider Scottish economy (Scottish Tourism Alliance, 2020). A report commissioned by the Tourism Leadership Group in 2018 found that the sector contributed around £6bn to the Scottish economy, 5% of total GDP (Scottish Government, 2018). Edinburgh in particular has seen significant growth in tourism

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numbers in recent years, with overall growth between 2013 and 2017 of 28% (City of Edinburgh Council, 2019). The city remains the most popular destination for trips in Scotland, counting for 42 percent of overseas visitors' overnight trips in 2016 (Scottish Government, 2018). After London, Edinburgh was also the most visited city in the UK by international tourists in 2019, with 2.;2 million visitors, spending £1.;2bn. Total visitor expenditure in 2016 was £1.5 billion (City of Edinburgh Council, 2019). Almost one quarter of the Sustainable Tourism Growth Sector's GVA was generated in the City of Edinburgh, with more than two million visits to Edinburgh Castle in 2017 (Scottish Government, 2018). 15.9 % of employment in the Scottish Tourism sector is concentrated in the City of Edinburgh (Scottish Government, 2018).

With regard tourism policymaking, devolution in Scotland has allowed the country to develop a distinct approach to tourism, planned at a national level. For Scotland, devolution is a process of creating local self-government and not limited to creating a national parliament in Edinburgh. While devolution has not fundamentally altered relations between central and local government in Scotland, the national framework is set by the Scottish Parliament (Mitchell, 2019). Also, the Community Empowerment (Scotland) Act 2015 placed a duty on Scottish Ministers to publish National Outcomes for Scotland every five years and involve community organisations at all stages of community planning (Mitchell, 2019). Recent political reforms have meant more parties around the table bringing a diversity of opinion, both at the national and city level. Until local electoral reform was implemented in 2007, Scottish local government elections were held using the single member plurality (SMP), or first-past-the-post, electoral system. The Local Governance (Scotland) Act 2004 legislated to introduce the single transferable vote (STV) from the 2007 local elections bringing greater plurality to governance in Scotland (Clark, 2020). This has allowed the SNP, Labour and Liberal Democrats to all participate in government at various points, however bolstering most significantly Scotland's large secessionist party, the Scottish National Party (SNP). Diversity has meant that both the Scottish Greens and Scottish Conservatives being decisive in allowing SNP minority budgets to be passed. While the SNP have dominated since devolution, the Scottish Conservatives have supplanted Labour as the second largest Scottish party at Westminster and Edinburgh, with implications for local governance (Clark, 2020). STV has meant more parties represented in council chambers, influencing the conduct of local politics in Edinburgh, which has seen a rise in the effective number of electoral parties (ENEP) of 2.56 in 2003 to 4.17 in 2017 (Clark, 2020). Since 2017 the council chamber has two large parties – SNP and the Conservatives, a middle range with two smaller parties, Labour and the Greens, and a handful of Liberal Democrats (Clark, 2020). Both councillors and members of the Scottish Parliament from across the political spectrum have voiced criticism of overtourism in Edinburgh in the past, but have agreed that party politics must be set aside to deal with the present challenges affecting the sector due to Covid-19.

Perceptions of overtourism in Edinburgh are closely linked to growing discontent around urban governance seen to enable the further commodification of a city, one of the most unequal in the UK. On the whole, Edinburgh is a wealthy city with average household incomes estimated to be 9% higher than elsewhere in Scotland (Edinburgh Open Data, 2020). Despite this, 22% of all households live below the poverty threshold, 18% of which live in material deprivation (Edinburgh Open Data, 2020). Inequality is rife in Edinburgh, where a child born in New Town West can expect to live on average 21 years longer than one born in Niddrie (Edinburgh Poverty Commission, 2020). Citizens in the most deprived areas experience significantly poor physical

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health, higher incidence of poor mental health, and premature mortality (Edinburgh Poverty Commission, 2020). Only 65% of participants are satisfied with the way the Council is managing the city, lower than in 2017 (69%), and trending downward since 2013 (74%) (City of Edinburgh Council, 2019). 35% of participants felt the Council provided value for money, down from 46% in 2016 (City of Edinburgh Council, 2019).

Tourism and Edinburgh's workforce

Scotland's population is largely urban, with over eight out of ten households listed as located in urban areas in 2019 (Scottish Government, 2020). At 89% the adult population is largely White Scottish/ White Other British, decreasing from 93% in 2013 (Scottish Government, 2020). Polish remained the most common non-British nationality in Scotland in 2019, with 91,000 nationals (23% of the total non-British population) (National Record of Scotland, 2020). Edinburgh has one of the highest proportions of non-British residents at around 16%, amounting to about 84,000 citizens (National Record of Scotland, 2020). The city's population has been growing steadily since 2008, driven primarily by migration, which has decreased since the Brexit vote in 2016 (City of Edinburgh Council, 2020). In the decade since the city has grown by 13.1% to 519,000 people, five times higher than the previous ten year period. In the same time Scotland's population has grown by only 4.5%. At 77.8%, Edinburgh has a higher percentage of residents of working age than any other major UK city. The unemployment rate while reaching 6.8% in 2014 during the height of the previous recession, was at 3.6% in the year to March 2019. The main reasons for being economically inactive are being a student or ill-health. However, it is estimated that by 2041 the number of citizens over 75 in Edinburgh will increase by 76%, meaning that the proportion of dependents will exceed the number of people working in the city (City of Edinburgh Council, 2020).

64.4% of the workforce in Edinburgh is educated to degree level, and the city has the highest proportion of workers in high-skilled occupations, higher even than London at 37.8%. At the same time, 25% of people live in poverty, with an additional 5% having fallen into poverty in recent years, with the opening of 46 food banks recorded in 2014 according to a report on poverty and income inequality (Scottish Government, 2020). Only 11% of entrants to higher education in the city are from the 20% most deprived areas, compared to 19% for the rest of Scotland (Edinburgh Poverty Commission, 2020). In fact, only six state schools account for more than half of pupils living in the most deprived areas of the city. The Scottish Government has committed the period 2022 to 2024 as one of delivery and acceleration of progress for the reduction of child poverty. A study resealed in September 2020 by the Edinburgh Poverty Commission estimated that 78,000 people and as many as 1 in 5 children live in relative poverty in the wealthiest city in Scotland (Edinburgh Poverty Commission, 2020). The study found that one in three of the city's households find themselves in poverty due to high housing costs. Numbers are expected to rise by at least 45000 people by Spring 2021 due to the pandemic. The same report found that prior to the pandemic, 59% of people in poverty in the city were in working households. The Commission found that Edinburgh had one of the largest drops in job vacancies in the UK between March and June 2020 and that by July the number of those claiming unemployment related benefits was more than three times the level recorded a year ago.

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In a survey carried out by the commission, 83% of all respondents claimed that 'work does not pay enough', and that this was the issue most commonly raised as a driver of poverty in the city. Four in five said lack of affordable housing was a main driver. For families on the lowest incomes, earnings account for more than 45% of household income, a similar figure to the share provided by social welfare payments (Edinburgh Poverty Commission, 2020). According to data from the Scottish Household Survey, the total number of households in Scotland has increased by 15 per cent over two decades from 1999 to 2.50 million households in 2019 (Scottish Government, 2020). In Scotland as a whole it is estimated that 60 per cent for both local authority and housing association tenants are not in employment. Within this context, we find a steady decline in the number of younger households in owner occupation, which fell from 53 per cent in 1999 to 38 per cent in 2019 (Scottish Government, 2020). The most recent Housing Need and Demand Assessment for the City of Edinburgh suggested a demand for housing over the period 2019 to 2032, of at least 3,000 per year (Edinburgh Poverty Commission, 2020).

Around one in ten of all jobs in Edinburgh are casual, temporary or non-contract, at 9% (Edinburgh Poverty Commission, 2020). Accommodation and food services make up a similar number, at about 9.3% of the working population, rising to 14% when distribution is factored in (City of Edinburgh Council, 2020). While hourly pay rates in the city are high on average, an estimated 14% of workers earn less than the £9.00 an hour Scottish Living wage. Bus travel remains cheaper than in other Scottish cities, but expensive for hospitality workers working antisocial hours and living on the city's edges (Edinburgh Poverty Commission, 2020). 53% of employees in tourism for example, earn less than the real living wage, compared with 17% of employees in the overall economy (Scottish Tourism Alliance, 2020). Tourism employs 218,000 people in Scotland equating to one in every twelve jobs, over 8 percent of the workforce, many in businesses with fewer than ten employees (Scottish Tourism Alliance, 2020). Overall employment in the sector has increased by 12%, since 2011 (Scottish Government, 2018). The sector has a much greater proportion of part-time workers at 46%, with more than 40 percent are employed in 'low skills' occupations than the Scottish Economy overall (Scottish Government, 2018). The Tourism Leadership Group found that median weekly full-time earnings across the sector stood at £357 in 2017, lower than the equivalent national figure for Scotland, which stood at £547. Transport costs are the single biggest expenditure for UK households after housing, accounting for 14% of the average weekly total (City of Edinburgh Council, 2020). While Edinburgh boasts two award-winning publicly-owned public transport companies (Lothian Buses and Edinburgh Trams), fewer than a quarter of resident workers have journey times of less than 20 minutes to work. The City Mobility Plan notes that 31% live in areas least served by public transport, and that large parts of the periphery have relatively high levels of population but low levels of public transport accessibility (City of Edinburgh Council, 2020). This lays bare the stark inequalities in the city, where a postcode lottery can dictate the quality of public services, negatively impacting the most deprived populations. Adults in the 20% least deprived areas were more likely to rate their neighbourhood as a very good place to live than those in the 20% most deprived areas (77% in the least deprived areas, and 32% in the most deprived areas) (Scottish Government, (2020). Demand for centrally located housing has skyrocketed in Edinburgh where the population has grown by almost 10% in the last ten years, focusing attention on the nature of tourism in the festival city (Scottish Tourism Alliance, 2020).

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1 Precarisation

The precarious nature of work within tourism is often widely classified as 'low skilled', although skills classifications in this regard are by no means universally adopted (Steedman & McIntosh, 2001). Indeed, there is evidence of significant levels of underemployment, in skills terms, among those employed in such work (Baum, 2018), especially among the mobile and migrant workforce. This is further exacerbated in cities with high levels of festivalisation where un- and underemployment are commonplace within the creative sector (O'Connor & Shaw, 2014; Bridgstock & Cunningham, 2016). Moreover, the low skills work in tourism is overwhelmingly precarious, characterised by the effects of stochastic demand (notably seasonality) combined with low pay, low entry barriers, poor working conditions, little or no investment in training, loose regulation and mostly absent union representation (Robinson et al, 2019). This work is substantially at the frontline and includes employment in a range of sub-sectors that are by no means homogeneous in operational focus, scale, demand or location, ranging across social care, facilities cleaning, retail, transport, travel and tourism, leisure, and hospitality.

Tourism employment in Scotland and Edinburgh

Tourism employment in Scotland increased by 13% from 2012-2017 which coincided with the introduction of the national tourism strategy in 2012 (www.visitscotland, 2018). Restaurants and mobile food service activities experienced the highest % change in the same period. The three well represented sub sectors where employment is high are: restaurants; hotels and beverage services. Tourism employment over the longer term from 2009-2017 has generally grown in Scotland's city regions with Edinburgh leading at 22%.

Scotland's Economic Strategy identifies sustainable tourism as one of six growth sectors where Scotland has a distinct comparative advantage. While 96 per cent of tourism enterprises are small (0-49 employees), they account for 51 per cent of employment in the sector. In contrast, large enterprises (250+ employees) account for just 1 percent of registered enterprises and account for 34 per cent of employment in the sector (www.gov.scot, 2018). However, as stipulated in an earlier report, there are major issues with definitions of what constitutes tourism and tourism employment. For example, the temporal nature of tourism work means that much tourism employment is part-time, seasonal, off-contract, within the informal economy and not recorded in national data and those that engage in platform work are hardly represented in tourism employment data (except in macro-economic estimates) or seen as self-employed.

1.1 Chronology of Precarisation: Casualisation, or the rise of the precariat

A casual worker is defined as a 'worker who works occasionally and intermittently'. Such workers are employed for a specific number of hours, days or weeks. They are not normally entitled to the same terms and conditions of employment as ordinary workers (e.g. they would not usually get sick or holiday leave. As De Stefano (2016) has pointed out, while historically the short duration of work has been the main defining characteristic, this has changed in the last decade in the EU with forms of employment spreading that affect the quantity and distribution of work rather than its mere duration. Increasingly, arrangements such as zero-hours contracts or gig work (work-on-demand and on-call work), worker may have a rather continuous work arrangement but the amount of work that is going to be available is unpredictable from week to week or even from day to day.

Low wages, unstable hours, and the cost of living in Scotland all combine to create precarious lives. This precarity impacts on certain demographics more than others (STUC, 2019). In 2018, there were 118,000 temporary workers in Scotland. Over one quarter reported working as a temporary because they cannot find a permanent job. 72,000 workers were on zero-hour contracts between October-December 2018. In 2018, 12.2% of the overall workforce was self-employed. Studies have suggested half of self-employed workers are low paid, and a number of employers use bogus self-employment contracts to reduce their tax bill and deny workers their rights. A recent Trade Union Congress (TUC) report found that nearly one in ten workers now does platform work at least once a week, 60% of them between 16 and 34 years old, and workers are turning to this gig economy to top up incomes. Although self-employment has fallen in Scotland since 2016, hours, modes of working, and contractual terms can further impact on certain people in different ways. Women are heavily over-represented in occupations which tend to be lower paid and undervalued compared to those which are male dominated. For example, 38.5% of women in employment work in low pay occupations, including caring, leisure and other service occupations, sales and customer service occupations or elementary occupations such as cleaners, or kitchen and catering assistants. There has been a big increase at the lower end of the occupational earnings distribution, particularly in the hospitality sector, which accounts for almost one-fifth of the net increase in employment since 2008.

1.2 Coping strategies and initiatives

Focus groups conducted by Scottish Trade Union Congress (STUC) found that participants from the creative industries agreed that precarity was and always has been normal and prevalent in their industries. They recognised that those who start out in their careers as the workers in their industry, were genuinely precarious as they had less bargaining power, worked longer hours, and often had low or no pay. In this respect, this study showed that precarity is not linked to skill level, rather the precarity also lies in the lack of time and control a worker has over their jobs and lives.

Migrant employment in the tourism sector

Tourism has a strong connection with labour migration, both temporary and permanent, and both transnational and domestic. It is often affected by tourism labour demand that cannot be covered locally (Lundmark, 2006; Williams & Hall, 2000) and by the seasonal characteristic of the industry. People migrate to other countries for better employment opportunities. Yet many migrant workers have been employed by service firms for numerous years, they often remain at low skilled levels compared to native workers (Janta et al, 2011). With the globalisation of the service sector, social networks are widely believed to play a critical role in the lives of economic migrants, particularly in terms of securing employment.

In the context of Edinburgh, much of the employee mobility to which we refer is low skilled and temporary although this is by no means universal as we also include long-term, low skills migrants and short-term creative migrants. Edinburgh is home to EU and non-EU migrants. At the time of the 2011 Census almost 16% of the Edinburgh residents were born overseas, almost double the level recorded in 2001 and well above the Scottish average of 7%. These changes are

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reflected in data on International in-migration flows to the city (Annual Population Survey (APS), 2019). During the ten years to 2013/14 Edinburgh recorded more in-migrants from outside the UK than any other Scottish Local Authority and accounted for over a quarter of all such in-migrants to Scotland as a whole. Official estimates of migration are therefore based on survey data and National Insurance Number (NINO) allocations to adult overseas nationals entering the UK. This dataset is published by the Department of Work and Pensions, includes registrations by any overseas national looking to work, become self-employed or claim benefits/tax credits in the UK. The data is available by local authority based on the place of residence of the applicant at the time of registration (City of Edinburgh Council, 2020).

Mobility of labour in the EU

Intra-EU mobilities: Workforce mobilities within the EU have used the following EU groupings in statistics:

- EU15 (these are the original EU members: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain and Sweden)
- EU8 (these joined the EU in 2004: Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia)
- EU2 (these joined the EU in 2007: Romania & Bulgaria)
- EU Other (Croatia, Cyprus and Malta)

Three waves of high net migration from the EU: 2004-2016

The first wave of significant EU migration was from 2004 when eight countries (the EU8 - comprising Latvia, Lithuania, Estonia, Poland, the Czech Republic, Slovakia, Hungary and Slovenia) joined. Malta and Cyprus also joined the EU in 2004 resulting in increased migration for the UK. The second wave was from the original 15 EU member states – especially from Southern Europe – after the 2008 global recession and the eurozone debt crisis. The third EU migration wave followed the accession of Bulgaria and Romania into the EU in 2012. Migrants entering from these countries were initially restricted in what kind of employment they could undertake. These restrictions were lifted on 1 January 2014. In 2004, the EU allowed existing member states to impose a temporary seven-year restriction on labour market access for full-time workers from the EU8. Most EU countries imposed these transitional controls for fear of rapid increases in immigration except the UK, Ireland and Sweden who allowed full access rights immediately.

In Scotland, there were 237,000 EU nationals in the year to June 2019, and over half of those people were nationals of EU8 countries. Polish remained the most common non -British nationality in the year to June 2019, with Polish nationals accounting for over a quarter (97,000) of all non -British nationals living in Scotland. In the year ending Dec 2019, there were a total of 48,200 NINO allocations to adult overseas nationals in Scotland (up by 27% from previous year) of which 27,200 were allocated to EU nationals (up by 14% from the previous year). There are approximately 17,000 EU citizens employed in the tourism sector in Scotland, 9.4% of the total workforce. There are also 11,000 EU citizens working in Scotland's creative industries, in

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proportions as high as 35% for some of the national performing companies (National Record Scotland, 2020). The Annual Population Survey for the year 2019 shows that food and beverage activities and accommodation were in the top 3 employment/industry divisions for EU nationals (APS, 2019).

In terms of workforce mobilities these countries, mostly part of what was for a long referred to as the so-called Eastern bloc states, were quickly contributing to inner EU mobilities, specifically with regards to low paid pockets in the labour markets, often referred to as low skilled as well: care, hospitality, retail, food and drink, agriculture. Over half of all EU nationals in employment reside within Scotland's 3 largest city local authorities; City of Edinburgh, Glasgow City and Aberdeen City. Nearly two-thirds of all EU nationals in employment in Scotland worked in the Distribution, hotels and restaurants, Public administration, education and health and Banking, finance and insurance industry sectors (BBC News, 2019). In this respect, they have also influenced tourism induced workforce mobilities, especially but not exclusively for seasonal employment (Janta et al, 2011; Rydzik et al, 2017). Research continues to confirm that EU migrants are often to be found at the bottom end of the job market, experience lower payment, unpaid overtime as well as intense and long working hours while facing precarious contracts since the years of EU Enlargement. In a 'migrant dense' industry like tourism, there is a risk that migrants 'could fall into the role of a semi-exploited (if often compliant) "underclass", with limited long-term prospects for social mobility and integration' (Sumption & Somerville, 2010: 29). Moreover, despite EU8 migrants being viewed as willing to do any kind of job due to their superior tourism employability skills, positive work attitudes and good customer service skills (Lyon and Sulcova, 2009), they earn the least and have the lowest rates of return on their education of any UK immigrant group (Drinkwater, Eade, & Garapich, 2006). Hence, EU8 citizens largely work in a precarious labour market with poor working conditions.

Labour mobility from outside the EU

In June 2019, there were 135,000 non -EU nationals living in Scotland, accounting for 36% of the non -British population. Of 48,200 NINO applications made to the Department for Work and Pensions in December 2019, 20,800 of these allocations were to non -EU nationals (up by 47% from previous year) (NRS, 2020). Most registrations were received from South Asia. The latest figures from National Records of Scotland (NRS) show that the population of non-EU nationals has been growing at a faster rate than EU nationals in 2019 with Indians at the top of the list (BBC News, 2020). Alongside this, Scotland has also seen a rising number of students from outwith the EU. The countries with the highest proportion of students were China (16% of all EU and non-EU international students), the United States (9%), India (3%) and Malaysia (3%) (www.gov.scot, 2018). Student participation in tourism work is common but little is known in terms of student employment in the tourism sector of Scotland or Edinburgh. A report on non-agricultural seasonal and temporary migrant workers in urban and rural Scotland found that 28% of seasonal workers were from outside the EU. Sectors with a higher prevalence of seasonal migrant workers were within distribution, hotels and restaurants as well as the seafood processing (www.gov.scot, 2020). This could potentially make up a significant student population but cannot be confirmed.

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1.3 Key stakeholders: precarisation

Key stakeholders	Key dates and initiatives	Mission
Scottish Artist Union	• October 2020: Seeing Red campaign began to support the sustainable Future of Scottish Artists and Makers • December 2019: The Scottish Artists Union, supported by the STUC's Union Modernisation Fund launched a Fair Work contract template for its members in order to tackle unfair work rates, terms &conditions.	Lobby for the rights and values of artists within Scotland through regular meetings and contacts with Scottish Government Ministers, opposition MSPs and Creative Scotland
Better than Zero	• Formed by workers in 2015 • More Time, More Control campaign: Exposing unpaid hours and heavy time discipline, and supporting workers to demand more paid time and control. • Cat Calling it out. This campaign highlights the sexual harassment faced by many workers in the services sector.	BetterThanZero is a combination of workers who organise in precarious work.
Engage Scotland	• December 2017	Engage Scotland joined forces with the Scottish Contemporary Art Network and the Scottish Artists Union to create a 19-point manifesto focusing on workers' rights and diversity in the visual arts. Through this manifesto they commit to ensuring that diversity is celebrated and respected, that low paid cultural workers and artists have access to fair pay and professional working conditions and that barriers are removed for all those who choose to participate.
STUC	• Established in 1999	Seeks to influence local government in Scotland, the government at Westminster and the European Union. Works with other trade union centres across the UK and beyond and consolidates International solidarity activities.
ACE (Autonomous Centre for Edinburgh)	• Established 1997	Supports and encourages people to take more control of their lives, co-operating as equals to create a shared world free from exploitation. Campaigns: **Precarity Office Scotland (PIE) project**

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1.4 Related Sub-Issues

The UK Government has now tightened many aspects of the immigration rules for non-EU nationals. In 2012, new restrictions were put in place including withdrawing the post-study work visa route that replaced Fresh Talent and the imposition of additional maintenance and reporting requirements on international students. In 2020, a points-based system was published that sets out plans to prioritise skilled migrants by expanding a skills-based migration system with points for a variety of characteristics including having a job offer by a sponsored employer at the right skill level and speaking English. Importantly, the 2020 paper makes changes to the routes available to lower skilled workers. This will imply limited options for migrant workers to perform low-skilled work in the UK. Moreover, with Brexit and the people of Scotland having voted categorically and decisively to remain within the European Union (EU), the political and economic impact on tourism employment is unclear. There is limited information on how the labour shortage in sectors like tourism and hospitality will be filled. To end this section, much of the data and issues raised are drawn from existing datasets and formal reporting collated by the government of Scotland. City level data and evidence remains obscured in the national reporting and therefore poses significant problems in identifying precarisation of tourism work in Edinburgh. Further probing is required at city level for EU and non-EU migrant workers performing in both the formal and informal economy of tourism.

Zero-hour contracts

There is no single definition for zero hours contracts. While some [employment] contracts are explicitly called "zero-hours contracts", there are other definitions available and used in published statistics.

- The common element to the definitions is "the lack of a guaranteed minimum number of hours." (ONS, 2018).
- "Unlike a traditional contract of employment, a zero-hours contract offers no guarantee of work." (CIPD, 2020)
- "ZHCs are an employment contract under which a worker is not guaranteed any hours and is only paid for work carried out. It can be viewed as a form of on-call working, as workers can be offered hours at short notice, as and when an employer needs them." (Datta, Giuponni and Machin, 2019: 373)

According to the Office for National Statistics (2019), 70,000 people in Scotland are on a zero-hours contract, or 2.6% of people in employment. This is a 10% increase on the previous year's figure of 64,000.

Racial inequalities. There are around 3.9 million BAME (Black and Minority Ethnic) working people in the UK, according to TUC research (2019) they are:

- Twice as likely to be on agency contracts than white workers
- 1/13 BAME workers are temporary employed, compared to 1/19 white workers
- 1/24 BAME workers are on a ZHC, compared to 1/42 white workers

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- Therefore, BAME workers face a triple hit of lower pay, temporary work and too few hours

"This financial insecurity places many BME workers and their families under significant financial stress and is a result of widespread institutional racism in the labour market" (TUC, 2019)

2 Platformisation

Reporting on platformed work is difficult specifically in regards to tourism. Gig employment in tourism is hardly represented in tourism employment data (except in macro-economic estimates). In many countries gig workers are seen as self-employed and data hardly ever gets the nuances. Although reporting is rising, it is difficult also to understand the proportion of work that is related to the gig. In the following, we suggest some proxies that could allow us some insights into the rise of platformed work we assume is connected to overtourism in the areas of Inner-city mobility, Food delivery and Housing.

2.1 Chronology of Inner-City Mobility

2015 Uber launching in Edinburgh. Proxy: Number of licences for private hire drivers: Statistics from Edinburgh City Council show that in the year to October 2015 there were 1143 applications for a private hire licence. However, that increased to 1763 for the following year, a rise of 54 per cent (Scotsman 2017).

2016 - Regulation & Migration issues: The UK Government has changed the law regarding private hire car (PHC) driver's licences with effect from 1 December 2016. From 1 December 2016 licensing authorities are prohibited from issuing licences, including renewals, to anyone who is disqualified by reason of their immigration status. This means that we must check that an applicant has permission to be in the UK and undertake work as a private hire car (PHC) driver when you first apply for a licence or first apply to renew or extend an existing licence.

2019 - Resistance: On the 24th of September 2019, Unite the union's Edinburgh Taxi branch has called on Edinburgh city council to begin an inquiry into the increasing number of private hire licenses operating in the city. The demand is supported by over 500 cab drivers and supporters who have signed a petition calling for an 'Over Provisioning Survey' to be undertaken by the Licensing Committee. (https://unitetheunion.org/news-events/news/2019/september/unite-calls-for-a-cap-on-private-hire-licenses-in-edinburgh/)

2.2 Coping strategies and initiatives

The issue of Platformisation is contemporary and the context for research is in early stages of development. Researchers are exploring the hidden geography of the on-demand app-based food delivery platform, Deliveroo, by making visible the unseen and obscured cycling routes of food couriers in Edinburgh (Gregory and Maldonado, 2020). The project led by University of Edinburgh contributes to an understanding of how digital platforms, and the attendant digital labour these platforms require, shape local urban and economic space. Data collection involved a mixed-methods approach, including qualitative research involving 25 interviews with Deliveroo riders. Findings of the qualitative research element suggests the presence of 'two Edinburghs,' or a city divided by physical geography and, importantly, by the navigation of risk. Riders actively discussed the strategies used to negotiate the city safely while working. Geo-localised digital data revealed the ways in which safety negotiations have become collective navigations through the city of Edinburgh. The authors suggest that *"urban platform hacking"*, when used with care, can be used as a powerful instrument to challenge urban narratives that foreground the integrated, optimised flow of resources and labour in the city (Gregory and Maldonado, 2020).

2.3 Key stakeholders: platformisation

Key stakeholders:	Key dates and initiatives	Mission
The Workers' Observatory is a collaboration of gig workers and researchers, supported by the Scottish Trades Union Congress and the Edinburgh Futures Institute at the University of Edinburgh.	Went live in September 2020 https://workersobservatory.org	The Workers' Observatory is at the disposal of workers whose work takes them from place to place in the city. It is a site to share and study what we see.
University of Edinburgh researchers Karen Gregory (SPS) and Miguel Paredes Maldonado (ESALA)	Quantitative data was gathered digitally through smartphone apps and a custom-made mapping workflow, which was developed in collaboration with student researchers and used by Deliveroo riders to track and map their delivery work.	Mapping navigations, to illustrate how on-demand food couriers create, modify, and reproduce social space in the city. Platform hacking, when coupled with qualitative work to challenge top-down urban narratives on labour as a hegemonic vector in the city.

3 Festivalisation

3.1 Chronology of Festivalisation in Edinburgh

Festivals and events (FE) are increasingly promoted at national, regional and city level for their economic, social and cultural impacts and benefits (Getz, 2010; 2012). Much of the research narrative about FE has been underpinned by a strong economic focus; here, our interest widens to recognise complex socio-cultural dimensions as well (Baum, Deery, Hanlon, Locksone and Smith, 2009). FE or what Harvey (1989) called the 'urban spectacle', have become a major pillar in the tourism offering of major cities and towns, worldwide (Quinn, 2010, 2019; Johansson & Kociatkiewicz, 2011; Lundberg, Armbrecht, Andersson & Getz, 2017) as well as well as playing a significant role in the framing of community culture and development (Stevens & Shin, 2012; Olsen, 2018). As Quinn (2019: 8) notes, FE *"remain a mainstay of urban landscapes, and feature strongly in urban development, urban regeneration and urban tourism policies"*. High profile FE are generally seen in positive terms by the general public (Salazar, 2017) although there is increasing awareness and concern about the cost burden to communities associated with hosting mega-events. However, Quinn also notes wider critical voices to counter predominantly neo-liberal narratives that support the 'festivalisation' of cities (Finkel, 2010; Stevenson, 2016; McLean, 2018) or what Carter (2017: 16), in discussing mega events, depicts as *"these bloated, orgiastic celebrations of global capitalism"*.

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Almost five million tourists visit Edinburgh each year, who's city centre is home to a resident population of only about 26,000 people (Scottish Tourism Alliance, 2020). The Sustainable Tourism sector has seen growth of 28% in the city between 2013 and 2017, necessitating the city to consider the social, economic and environmental aspects in their Edinburgh City Centre Transformation Strategy (City of Edinburgh Council, 2019). The strategy highlights the need to protect the built environment, noting how the Old Town is a highly symbolic focus for visitors and those that live and work in the city centre. There are many streets, closes and spaces of significant and diverse qualities that combine to provide a rich experience for all navigating through it. A survey conducted for the strategy found that only 37% of survey respondents are satisfied with the quality of central public spaces, and highlighted issues relating to the pedestrian experience including noise, lack of walking space, interrupted footpaths, lack of space for dwell and the poor quality of public realm (City of Edinburgh Council, 2019).

Underpinning much of the academic discourse are explicit and implicit references to 'chicken and egg' reciprocity in the relationship between the growth and changing faces of urban FE on the one hand and increasing gentrification of many cityscapes. In other words, there are two arguments: cities gentrify by design or happenstance and the nature of their cultural environment, which includes FE, changes as a consequence or, alternatively, cities promote festivals and events that, by their very nature, promote changes that gentrify the wider economy and culture of host communities in cities. Gravari-Barbas and Guinand (2017) clearly locate within the latter camp in endorsing Gotham's (2005) argument that tourism (within which FE are located in this context) acts as an agent of gentrification in urban spaces while also highlighting wider neoliberal processes of capital accumulation and real estate speculation that act in consort with tourism within gentrification. At a policy level, highlighting a portfolio of FE is a major strategic objective for cities in supporting urban redevelopment and has long been a key motivator in a city's aspirations to be the European City of Culture (Richards, 2000; Liu, 2014). Mega-events, such as those in the sports area, frequently act as the anchor for major urban regeneration, transforming the physical place (Hillier, 2017) but also challenging existing cultural behaviours (Oliver, 2016).

3.2 Coping strategies and initiatives

Launched at the Scottish Tourism Alliance Signature Conference in March 2020 and endorsed by Scotland's First Minister, Nicola Sturgeon, Scotland's latest tourism strategy also recognises that tourism is no longer just about growth in tourist numbers, "*it's about people. Success means more than numbers; it's about enrichment and prosperity for residents and our visitors*" (Scottish Tourism Alliance, 2020). Entitled, "Responsible Tourism for a Sustainable Future", the document notes the discontent among local residents who see increasingly negative impacts of tourism, echoed widely in the media. The latest strategy is increasingly focussed on actively engaging local residents in the management, and hopes to *"capitalise on new and emerging technologies to develop technology driven solutions to tourism industry challenges"* (Scottish Tourism Alliance, 2020). It is notable however, that technological innovation has also brought with it many challenges in recent years, in particular the rise of digital accommodation platforms, which have been seen to displace residents from the city centre. While traditionally, residents were able to sublet their spare room during the summer festivals, a year-round commodification of the accommodation (and housing) market is now described by locals.

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Numerous pundits, publications and social commentators have been vocal in their criticism of the role of festivalisation in overtourism in Edinburgh, "a city suffering from economic apartheid" (Brown, 2019). An article in Scotland's red-top Daily Record laments that *"the capital has the most rapidly accelerating rents anywhere in the UK, and its chronic housing shortage is exacerbated by the fact that it has the highest concentration of Airbnbs of any European city"*. The article quotes filmmaker Bonnie Prince Bob who sparked debate with a six-minute film, There's No Edinburgh in the Festival, in which he accused Edinburgh City Council of *"acute class cleansing and rampant gentrification" (Discontent, 2019)*. It continues to interview a number of residents in deprived parts of the city who are told that, *"The money from the festival filters down – but [...] Not to here"*, and that *"We don't know there is a festival until you go to the centre of town, apart from the buses are late. I don't see the benefit apart from the odd free ticket*". In the same article, city council leader Adam McVey admits that "For over 70 years, the festivals have evolved, and [...] with their success of course comes inevitable pressures for us to manage it" (Brown, 2019). Writing in another newspaper, Ashley Graczyk an independent City of Edinburgh councillor for Sighthill-Gorgie feels that, *"the festival has outgrown the city. It is clear that a city of 400,000 people can no longer sustain a flood of visitors 10 times the number of its own population once a year."* (Graczyk, 2020). The councillor listed packed public transport, inaccessible public spaces and blocked out views of the castle as examples that Edinburgh is now suffering the multiple consequences of overtourism (Graczyk, 2020).

A litany of press articles highlights concerns from politicians across the spectrum with regard to the festivals and overtourism. Several have focused on the Christmas and Hogmanay celebrations, which included a controversial market at East Princes Street Gardens which saw more than 2.6 million people visit over seven weeks (Herald Scotland Online, 2020). In one, Labour Member of the Scottish Parliament (MSP) Sarah Boyack voiced her concerns that *"rather than tear up the city landscape for profit, we should be working to find more suitable sites to host such enormous events"* (Herald Scotland Online, 2020). In another, Scottish Green MSP Andy Wightman likens the rapid reduction in residential housing supply to a *"modern-day clearance"*, referring to the eviction of significant numbers of tenants in the Highlands of Scotland in the eighteenth century. Citizens groups have formed to voice their criticism, including the Citizen group led by local residents. Speaking on their behalf, Mike Small believes that *"the true fault lies with the city council who have handed over wholesale large parts of the city to this one company. Hogmanay has become a hollowed-out cultural experience and the city has been reduced to a theme park"*. Another article cites a study for the Edinburgh Tourism Action Group (ETAG) reporting that 500 visitors found they were far more likely to feel *"surrounded by foreigners"* than *"hear Scottish accents*" on the Royal Mile (Edinburgh Evening News, 2019). The study found that the Old Town "is at risk of becoming a tourist ghetto, which will certainly detract from its long-term appeal and economic potential", evidence the Citizen group feel of *"an orgy of profiteering. Edinburgh is the city of capital not the capital city. This can't go on*" (Edinburgh Evening News, 2019). The report was written about extensively in the press, with many lamenting that *"the big festival giants have been allowed to privatise or seal-off many of Edinburgh's most iconic and picturesque parks or public areas for profit. George Square, Bristo Square, Castlehill, Charlotte Square and parts of the Meadows are all cordoned off throughout August. Local Old Town residents are continually forced into pleading with lines of surly, newly arrived G4S security guards just for access to the streets where they live or work"* (MacLeod, 2019). Much of the criticism is levelled at the floor

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of the Festivals themselves, including the Edinburgh International festival and the now mammoth Fringe.

As Cuthill (2004) notes, FE bring together people to participate temporarily in an enhanced place experience. We would argue that this coming together extends beyond the human to incorporate the final three dimensions of capital, communications and technology. It is the temporariness of FE mobilities that distinguishes them from broader conceptions of tourism mobilities. Mobilities relating to FE in this context, are movements that are socially constructed (Carter, 2017) as opposed to the physical movement of individual people or objects. These include the mobilities of performance labour (creative, sporting) that provide the attraction of FE (Baum, 2018) – can also perhaps be described as precarious. Also important is the need to understand mobilities of support labour, local and migrant, that deliver services at FE such as security, catering etc. as well as within the wider city environment – accommodation, transport etc. This includes workers in the gig or sharing economy. The mobilities of volunteer labour are also important, frequently intersecting with the mobilities of lifestyle (Cohen, Duncan & Thulemark, 2013), which is characteristic of many FE.

3.3 Key stakeholders

Key stakeholders	Key dates and initiatives	Mission
ETAG	• The ETAG Full Group is made up of representatives from the major stakeholders, agencies and industry groups who have a role in the delivery of tourism in Edinburgh. • Meets around 6 times a year to discuss the key challenges, opportunities and strategic issues for tourism in the city.	Members of the Full Group contribute their time, knowledge and expertise on a voluntary basis to support the development of Edinburgh's tourism sector
Citizen – Mike Small	• Established in 2019	A campaign network that aims to reimagine Edinburgh as a city of "social justice and equality, not just a space for consumption and profit".
Cockburn Association	• Edinburgh's Civic Trust - one of the world's oldest architectural conservation and urban planning monitoring organisations, founded in 1875.	Since 1991, the organisation has been responsible for Edinburgh's annual Doors Open Day scheme.
Fair Fringe (Unite)	• A campaign to improve the wages and conditions of Fringe staff. Standing up to exploitation.	The Fair Fringe charter, part of the Fair Fringe campaign launched in July 2017, aims to tackle the potential exploitation and poor working conditions experienced by employees during the festival.

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Napier University - Jane Ali-Knight	• Dr. Jane Ali-Knight is a Professor in Festival and Event Management at Edinburgh Napier University, Scotland currently leading and developing the festival and event subject group	Research into strategic use of festivals in Edinburgh - what are the costs and who pays? Where is the space for grassroots festivals, both in the calendar and in the city's urban topography, and what is being done to make it accessible to residents and communities?
Edinburgh Futures Institute / City of Edinburgh Council – *Gemma Cassells* *Jenny Elliott*	• EFI working on a challenge-led and data-rich portfolio of activity that has demonstrable ethical, social, cultural, economic and environmental impacts.	Traveltech Scotland -to help the Scottish tourism sector make a sustainable recovery from the devastating effects of the pandemic through technological innovation

3.4 Related Sub-Issues

Earlier this year, Edinburgh's council leader ordered urgent action after memorial benches were dumped to make way for the capital's Christmas market, again prompting criticism from Mike Small of Citizen who pledged that: *"Hogmanay is a time for New Year's resolutions – ours is let's reclaim our city from hidden networks and businesses carving up Edinburgh for profit"* (Williams, 2020). Businesses are also critical - of street closures in particular - as documented by the BBC in a piece on restrictions in place from 28 July to 1 September last year (Brown, 2020). In the article, Galab Singh Gold, a senior director and partner of the Gold Brothers, explained that *"the 2019 installation was such a disaster for the business community and visitors"*. The Edinburgh Hotels Association has called for an urgent rethink of how the city is promoted globally following disquiet over the festivals highlighted in international press. Organisations such as Edinburgh World Heritage, who are tasked with protecting the city's UNESCO world heritage status as a Unesco site have called for events to be scaled back, as they *"clearly disrupts this magnificent environment to a very great extent"* (Williams, 2020). Hogmanay Celebrations like many of the larger events of the Edinburgh Festival Fringe are produced by a large London-based production company, Underbelly whose co-founder and director Ed Bartlam has been quick to defined criticism given that Hogmanay brings an estimated £40 million into the city - "There are some [...] suggestions of residents not being allowed access, which is untrue, as a way of pushing that view" (Brown, 2020). Cliff Hague of the Cockburn Association - another association advocating on behalf of local citizens has suggested that Edinburgh is now effectively run by the tourist industry and that *"Edinburgh City Council exists to serve the citizens who live there may seem quaint, but it is important"* (Alexander, 2019). Terry Levinthal, director of the Cockburn Association, said he felt tourists were being given priority over residents, and that *"the implications these events have is that it removes green spaces for people who live in the city for much longer than the Christmas market takes place. We have got to the point now where the commodification of the city is a major public concern"* (Herald Scotland Online, 2020).

Director of the Edinburgh International Festival Fergus Linehan admits that there is a problem, and that *"the arts (have been) framed as part of a wider economic regeneration agenda that's all about tourism and never-ending growth"* (Pollock, 2020). For Linhehan, that old approach is no longer sustainable either environmentally, and represents a departure from the spirit of the

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inaugural 1947 Edinburgh Festival staged in a post-war Edinburgh as a *"platform for the flowering of the human spirit"* (Pollock, 2020). Linehan believes that the desire to sort out the negatives of overtourism is not so far matched by a desire to see the festivals cease to exist. Shona McCarthy, chief executive of the Edinburgh Festival Fringe Society since 2016 agrees that *"the negativity towards tourists seems to be seeping out"*, but suggests that the festival is *""is part of the solution for the city, rather than the problem"*. "Do we want to be seen as a city that is shutting up its doors?" (Gardner, 2019). Outside of the general criticism related to overtourism, the Fringe has come under fire for exploitation of workers and poor conditions. In recent yeast groups such as the Fair Fringe have launched numerous campaigns highlighting the exploitation of artists and other workers. The group, made up of Fringe workers, Unite Hospitality and Better than Zero trade unionists, and activists from Scottish Labour Young Socialists, is calling on Fringe employers to sign up to a charter for Fringe workers, offering testimony from one former employee who reported that, *"In 2015 was working 55 hour weeks in catering at the Fringe. My shifts were either eight or nine and a half hours long, six days a week. It was exhausting and found both my physical and mental health deteriorating, and felt burnt out for months afterwards"* (Harris, 2017). A 2018 survey by The Fringe Society found that 54% of workers received less than the then national minimum wage of £7.50 per hour, and that 34% of those contracted to work were on zero-hour contracts despite the fact that nearly 48% of them worked more than 49 hours a week (Alexander, 2019).The Fringe Society estimate the value to Edinburgh of this event is £200 million. The survey found widespread evidence of verbal and physical abuse of staff and mentions of sexual harassment (Alexander, 2019). Another report published this year found that men are earning an average of 60 per cent more than women at the Fringe, and that *"poor recruitment practice [...] allows employers to easily discriminate on the basis of age, gender, race, disability, or simply their looks"* (Bell, 2019). Equally widely reported is impact of short-terms lets on creative workers, and how changes to rental rules in Scotland threaten to turn the fringe into *"a glorified industry showcase"* which means that *"you have fewer artists of colour, working-class artists and disabled artists – they're already so poorly represented and are now being regularly priced out"* (Bakare, 2019) Almost 2 million tickets were sold for the Fringe in 2010, and by last year this had grown to 3 million tickets for 3,800 shows (Pollock, 2020).

3.5 Summary and outlook

In short, the nature of participation in the festivals - who benefits from the success, wealth generation and cultural celebration is at the heart of the conversations around overtourism in Edinburgh. This is exemplified by the furore over short-term lets, following a 2018 UK Housing Review which revealed there were 10,000 Airbnb properties in Edinburgh – one for every 48 city residents, a higher concentration than London, Paris or New York (Pollock, 2020). The report found that approximately 29 out of every 100 properties in the city's desirable New Town area were active short-term rentals (Pollock, 2020). The controversy has prompted action from the government to regulate the purposes of licencing, planning and taxation interventions. The Scottish Government intends to lay both the Licensing Order and the Control Area Regulations in December 2020, and are expected to come into force in April 2021 (Scottish Government, 2020). One of the consequences of gentrification in cities is the further marginalisation or social exclusion of some sections of the community, frequently those forced out by physical and economic change within urban spaces. The excluded, in this context, frequently include those at the intersection of disadvantage by virtue of socio-economic status,

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undocumented legal status, age, gender, religion, ethnicity, sexuality and disability (Walters and Jepson, 2019). Walters and Jepson (2019) and their contributors provide an extended analysis of the relationship between marginalisation in its broadest sense and FE. They rightly point out that FE can assist in overcoming aspects of marginalisation or social cohesion by providing a sense of common identity at the city and community level. They can also give expression and pride to marginalised or peripheral groups in sharing aspects of their culture with their city and with visitors (Coetzee and Liu, 2019; Walters, 2019). However, such positives need also to be balanced by counter experiences where factors such as alienating cultural focus, pricing policies and a failure to engage with marginalised communities can have the unintended consequence of increasing social exclusion (Baum, 2018).

The proportion of residents who have attended an Edinburgh Festival in the previous two years is unchanged at 66%, however when we look at specific major events such as the Festival Fringe there is only a 37% local participation, with only 20% local participation in Edinburgh's Hogmanay event (City of Edinburgh Council, 2020). Attendance levels were also lower for unemployed people at 38%, and people with a disability or long-term illness at 48% (BOP Consulting, 2018). When we look at participation by ward, we see that this rises as high as 82% in affluent Morningside and falls to 51% in Pentland Hills (BOP Consulting, 2018). When residents are asked whether they feel the Festivals make Edinburgh a better or worse place to live, there is a mixed picture with 72% saying better and 7% of residents saying worse, although this figure has dropped for the second year running: from 80% in 2016. Unemployed people were less positive, with 52% considering Edinburgh to be a better place and 14% saying the festivals make Edinburgh worse, indicating that many don't feel the financial benefits of tourism. Those more likely to think festivals made Edinburgh worse were those aged 65+ and those with a long-term health problem/disability, pointing towards issues of access and mobility (BOP Consulting, 2018). Additionally, adults living in the 20 percent most deprived areas were more likely not to have not made any visits to the outdoors in the past 12 months (Scottish Government, 2020).

The Edinburgh case offers a tale of two cities - of haves and have-nots – those who have access and those who are excluded. While place is intrinsically important to the tourism offer put forward by Edinburgh, the city' most important asset, its people are often forgotten. Writing in the popular Scottish Bella Caledonia blog on the subject Mike Small of Citizen summarised the situation being, *"the dynamic between the festival and everyday Edinburgh – and wider Scottish culture – is not a positive one. The overwhelming impression is that the festival is located in, but not of, Edinburgh*" (Gardner, 2019). The Edinburgh Tourism Action Group agree that "collective intervention" is needed to preserve the city's history, heritage and built environment and the *"feeling of authenticity"* in the Old Town, as well as protect the quality of life for local residents (Edinburgh Evening News, 2019). In the context of SMARTDEST, then, the issues addressed above are underpinned by complexity and, indeed, paradox. Locating them in the context of a changing urban environment that incorporates the consequences of the merging gig or sharing economy is particularly challenging and takes us into largely uncharted waters. Given that Scotland has set a target date for net-zero emissions of all greenhouse gases by 2045, environmental impacts will also form a part of this dialogue (Scottish Tourism Alliance, 2020). The proportion of adults viewing climate change as an urgent problem increased from 46 percent in 2013 to 68 percent in 2019, meaning that for the first time, the majority of each age group viewed climate change as an immediate problem (Scottish Tourism Alliance, 2020). Importantly,

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smart solutions to destination management will be welcome in Edinburgh, which attracted more digital technology investment in 2016 than any other UK city outside London (City of Edinburgh Council, 2019). The proportion of households in Scotland with internet access was at a record high of 88 per cent in 2019, meaning that any such solutions will be easy to implement within a robust infrastructure (Scottish Government, 2020). The proportion of internet users using a smartphone to go online was greater than the proportion who accessed the internet using a PC or laptop (72 per cent) (Scottish Government, 2020).

Many agree that gentrification appears to have become an official tool of urban policy, a view which is echoed in community criticism of Edinbrugh's growth model (Lees and Easton, 2020; Baeten et al., 2017; Herrera et al., 2007; Lees et al., 2016). Discourse around the effects of gentrification - whether driven by tourism or urban development - have always been highly polarised (Easton et al, 2020). Interpretations of socio-economic change are critical to understanding negative outcomes and population displacement (Bernt and Holm, 2009). Many commentators agree that the impacts of gentrification may be significantly underestimated (Millard-Ball, 2002; Easton et al, 2020). Academic focus has concentrated on gentrification led by residential property development, ignoring displacement resulting from industrial, retail or cultural gentrification. Measurement of displacement of social capital, effort required for lower income residents to remain in their homes, or impacts on future residential choices is difficult given the lack of data. For researchers, the spatial scale at which we view and analyse the phenomenon also determines what we see. However, few studies have used multilevel modelling to study gentrification in place. The data that does exist has significant limitations, as data relating to household income, rent or house prices is not collected in the UK census (Eastol et al, 2020). Gentrification scholars such as Easton et al (2020) have proposed *"less conventional approaches to collating quantitative data on gentrification-induced displacement are growing in importance in an age of 'big data' and participatory GIS"* (Easton et al, 2020; Aubrecht et al., 2011, 2016; Goodchild, 2007). Participatory GIS tools will be important in understanding the dynamics of displacement caused by overtourism in Edinburgh, and will significantly support the engagement process for SMARTDEST. A 2019 article in the journal Sustainability, found that among the methodologies to use big data to measure tourism sustainability "*there is not an international and generally accepted statistical framework, including social and environmental dimensions for the measurement of tourism sustainability*" (Pérez Guilarte and Barreiro Quintáns, 2019). While the United Nations World Tourism Organisation (UNWTO) "Measuring Sustainable Tourism (MST)" programme is currently under development, there are concerns about ,"*the lack of an up-to-date international and generally accepted statistical framework to measure tourist sustainability; on the other, the underexploited application of big data by official statistical agencies*" (Pérez Guilarte and Barreiro Quintáns, 2019:2). Those researchers found that there was a pressing "*need to establish win-win relationships among public and private stakeholders*" and agree common indicators, especially those contributing with geographical and temporal granularity (Pérez Guilarte and Barreiro Quintáns, 2019:14).

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4 Edinburgh during COVID and perspectives on the "recovery period"

Figures from HMRC (Her Majesty's Revenue and Customs) show that by the end of July, just over 90,000 Edinburgh residents were being furloughed, dramatic for a city with one of the lowest employment rates in the UK (City of Edinburgh Council, 2020). Edinburgh has also since seen a higher increase in Universal Credit relative to other major cities in the UK, since March 2020. Between March and August Edinburgh observed an increase of 147% of claimants for Universal Credit. This represents a percentage change in claimant count of 162% change from March to August compared with a 99% change overall in Scotland. The uneven impacts of the pandemic are felt particularly in the sustainable tourism sector, as evidenced by the number of furloughed workers per sector. In May 2020 84.0% of the workforce in Accommodation & Food Services, and 74.1% in the Entertainment & Recreation sector were furloughed. In August, during the height of the usual festival season when quarantine restrictions were used somewhat, 40.7% and 29.3% of workers were still furloughed in those sectors. Impacts can also be felt in terms of short-term accommodation, revealing the true burden of AirBnB on Edinburgh's housing market. Since the beginning of the pandemic, the number of short-terms properties to let has plummeted in Edinburgh, while new long-term let have risen by 62%, freeing up 65 such properties to house homeless families (Pollock, 2020). Between March and June, the city saw one of the largest drops in job vacancies in the UK, coinciding with a threefold rise in the number of people claiming unemployment related benefits (Edinburgh Poverty Commission, 2020). The Edinburgh Poverty Commission, who has estimated that around 15% of the city's population is living in poverty, have calculated a rise of at least 4,500 people by April 2021 unless action is taken to support those affected by the impending recession. They have called on the Scottish Government and City of Edinburgh pandemic Council to, *"ensure that any public funding for the post Covid renewal of the city's festivals and tourism economy is conditional on delivery of actions to promote fair work, inclusion and equality"* (Edinburgh Poverty Commission, 2020).

High levels of income inequality in the city means that public spending needs to be reconsidered in light of challenging global circumstances. Some of Scotland's local authorities had already been considering future introduction of visitor levies, by careful and sensitive implementation, to ensure they support Scotland's tourism offer (Scottish Tourism Alliance, 2020). At least in the short to medium term, the health and wellbeing of Scotland residents will need to be prioritised over the desire for visitors. In her manifesto on the cultural crisis facing the city, Morvern Cunningham, a freelance creative producer who works alongside and within communities, laments the decline of local grassroots arts spaces - those that are left facing enormous challenges to survive in the current circumstances (Cunningham, 2020). For Cunningham, the loss of venues to support homegrown activity is *"masked somewhat by the massive influx each year of mainly London-based conglomerates who seize control of numerous private and public spaces for commercial gain, with a primed council system seemingly adept in supporting temporary pop-up cultural venues and bars during the months of August and December"*. Many like here see the pandemic as an opportunity to take stock, and rethink, explaining that *"what Edinburgh needs now more than ever is a radical bottom-up reimagining and re-evaluation of the city's future, with an emphasis on community-led solutions going forward"* (Cunningham, 2020). A meeting of Edinburgh's Policy and Sustainability Committee was convened in June to discuss the economic damage being

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wreaked by the pandemic on tourism and hospitality (Cardownie, 2020). The pandemic has for 2020 contained the scale of the Fringe – which between 1973 and 2017 saw a nine-fold increase in the number of shows; a 38-fold increase in performances; and a 21-fold increase in ticket sales (at 2.5m in 2017) (McCrone, 2019). Aside from the Fringe, the official Edinburgh Festival is a publicly-funded event, meaning that public investment has this year been lost. The Committee estimates an overall reduction between 50 and 70 per cent in international arrival and tourism receipts, and almost £1 billion in lost equating to around 18,500 jobs (Cardownie, 2020). Due to a dependence on international visitors Edinburgh is facing a higher impact and potentially slower recovery than the rest of Scotland (Cardownie, 2020).

Conclusion

From multiple perspectives, the nature of social exclusion and how it is manifest is difficult to define and quality. Equally the phenomena of over-tourism, as literature review help reveal over the course of the project, is also complex and not easy to categorise by geography or traditional territorial dimensions. We welcome the emphasis on both qualitative and quantitative approaches to the research as set out in project documentation, while the focus to data has been data driven an extent. Research undertaken for previous work packages as part of SMARTDEST found significant issues with the robustness of big datasets and surveys collected at the national level – in particular but not limited to the area of work and employment. These issues have been raised and discussed on several occasions among partners in response to how the project has been structured to identify broad trends in Eurostat data and go more into detail with local data sources subsequently. Given the established lack of comparative data, it is envisaged that for many of the work packages, there will be similar issues related to verifying phenomena around overtourism and social exclusion following a top-down approach. In critically discussing existing data gaps, and acknowledging the limitations and shortcomings associated with that data, we can note data concerns, and seek out appropriate proxies to demonstrate territorial or other differences within the parameters of the research. We therefore propose a research approach to allow for local phenomena to be identified through local data sources (proxies), and then verifying these subsequently in the bigger (Eurostat) data sets. This would allow for interrogation of national data sets, for instance housing and social-economic data, urban metadata, and other creative data sources outside the Labour Force Survey. This we refer to as a 'bottom-up approach', an illustration of how this approach may work in practice is provided in the diagram below (proposed to partners in July 2020).

Taking a bottom up approach, will allow for relevant and emerging phenomena to be understood at a local level, before these are mapped across the cases at the wider scale. It would allow for a better understanding of why we observe differences in the wider data set, and allow for greater progress to be made in generating insights in the short term. Case study work may identify more robust indicators to work with where comparative data at the subregional level is (almost) non-existent. A bottom-up approach would seem to align better to the *'city labs'* methodology which promotes engaging at the local level at the very beginning of a project, in order to conduct meaningful participatory research with stakeholders. We are also conscious that we will need to produce data and visual assets to help probe issues with stakeholders and workshops.

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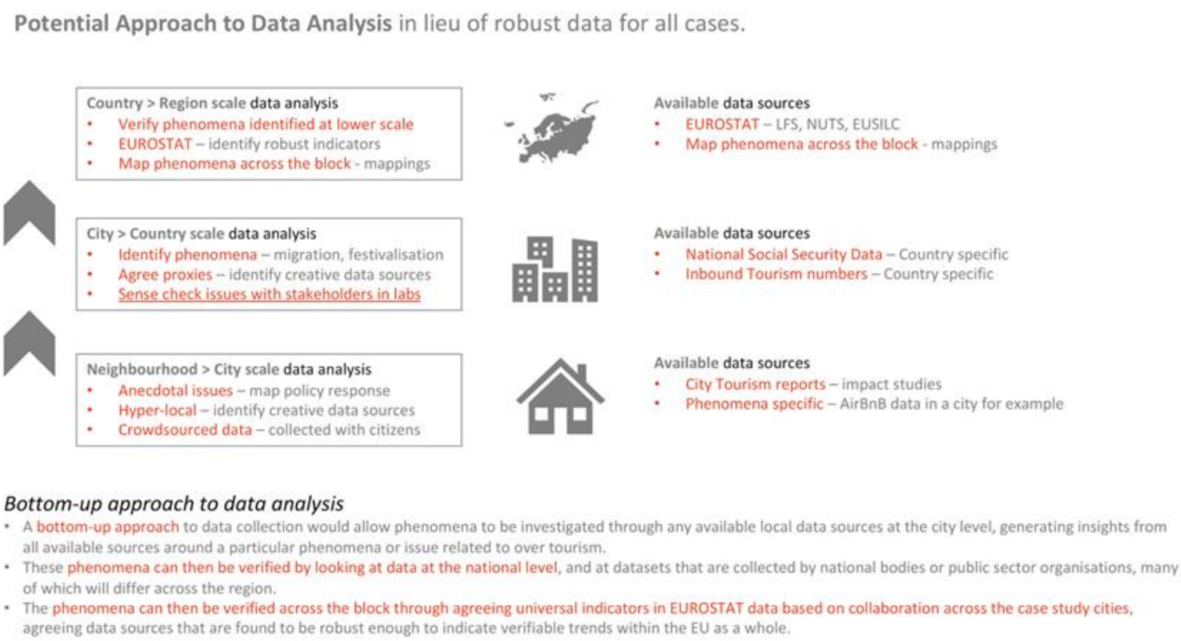


In this regard, we have been in conversation with a local start-up - *https://www.vocalista.co.uk/the-platform* - who are building a destination management platform, that could help with engagement on our cases study, and potentially with others. These conversations are at an advanced stage but are somewhat hampered by a lack of clarity around common approaches to engagement over this stage of research. Irrespective of SMARTDEST, *vocalista* are building software which would allow multiple stakeholders – citizens, subject matter experts, destination managers and visitors - to dialogue around the nature of tourism in place. There is potential to engage *vocalista* in a deeper co-development relationship with them in order for them to develop functionality based on our needs across the project - should be this something that would be of interest. I note that they are in the early stages of development, but that this is also an advantage a partnership would help their development, and build destination user cases.

Should their development process fit with our timeline, we would like to use this platform to facilitate our engagement process. However, in order to progress this opportunity, we need clarity on what is excepted as part of the 'city labs' process, in order to recreate this in a digital platform. For this we need to agree what data collection processes need to be digitised – collection of qualitative, quantitative information; social or spatial data and responses? In doing so we need clarity from partners on some questions below,

- *How would engagement have been facilitated in a pre-pandemic 'city labs' and what can be done through a platform?*
- *What data assets should be produced for engagement- tools, prompts, images or video? Do we want to set boundaries around topics or themes?*
- *How might data be displayed? Do we want to facilitate interaction with stakeholders and how? (We might want set up Zoom calls with stakeholders in addition to through the platform, and breakout discussion)*
- *Who can access the platform – should we control this to anyone with an invitation or by certain criteria, for the basis of the EDI case (We could look at a spatial designation)?*

- *What precedence in terms of research and workshop methodology – tools, best practice, other platforms or organisations working in this area) that could inform development of the engagement platform (or methodology)?*

We continue to consider the set of questions that we would like to frame the EDI research, and continue to interrogate the literature, as guidance form partners develops. In the area of Festivalisation, one aspect to prove may be the measurement of social exclusion as 'displacement' and wonder if there are ways that we can seek to interrogate and measure 'micro-displacement' in the context of overtourism – through spatial data, or data on 'retail displacement' for example.

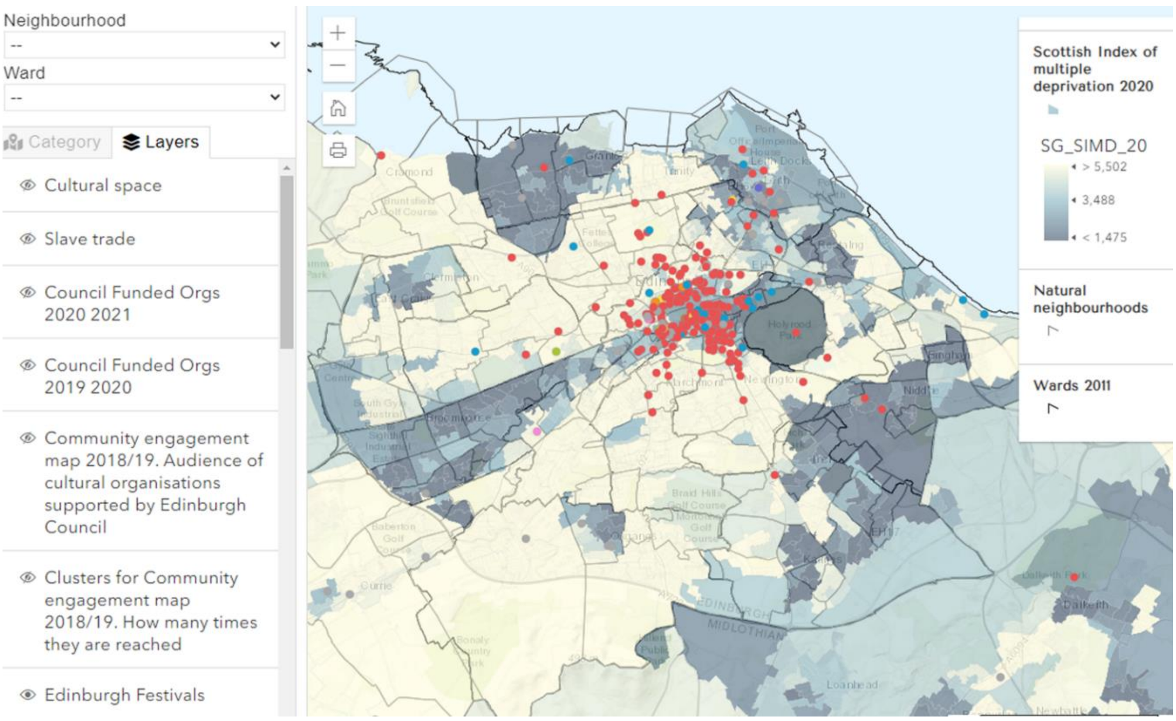
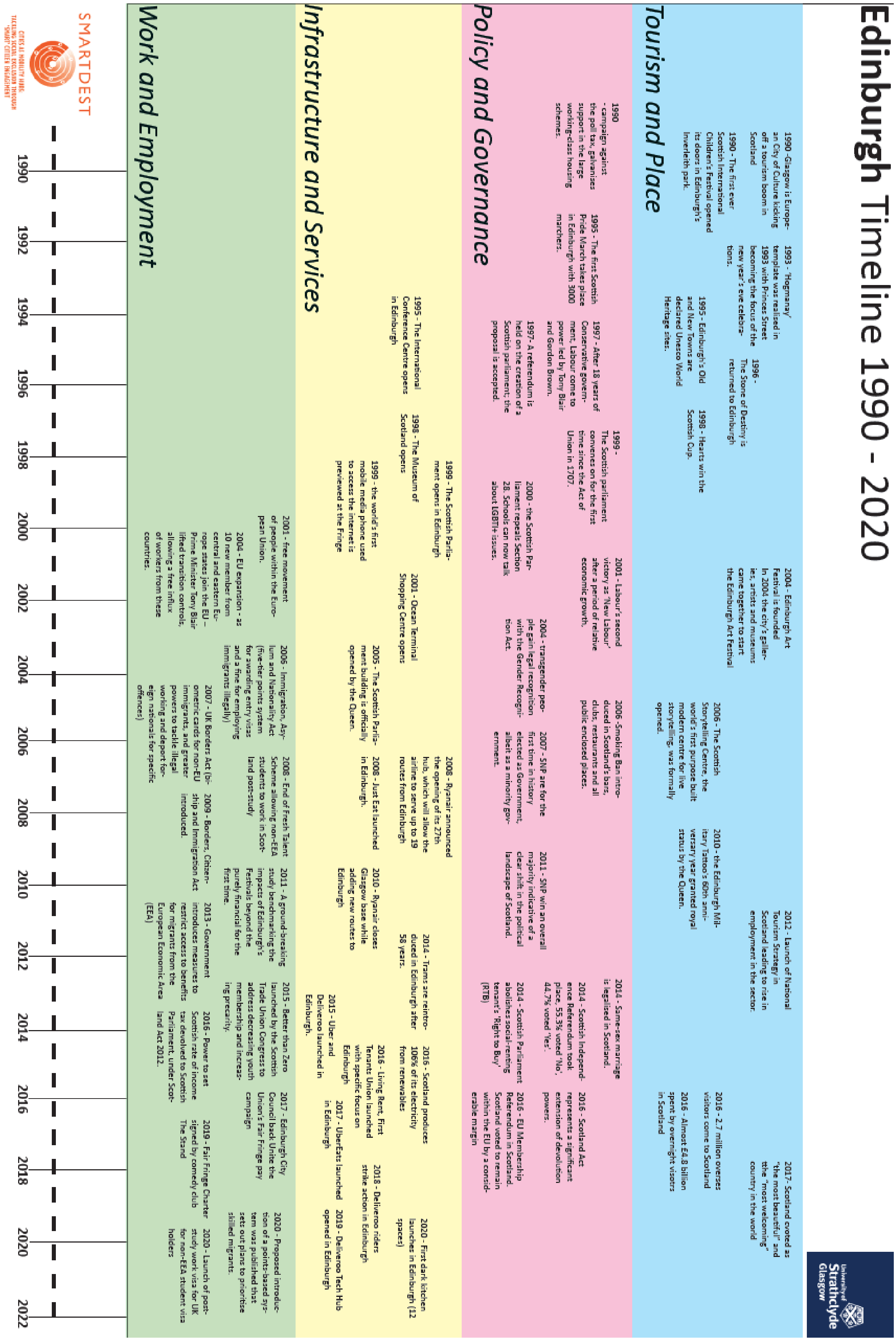


Figure 1: Mapping of Edinburgh Festivals alongside Scottish Index of Multiple Deprivation. Source: own calculation using Edinburgh Community Mapping project.

Answering these questions should help our team – and those working on other case study cities – to coalesce around an approach to the engagement, and define a limited and specific methodology for action research.

Appendix

Timeline Edinburgh: 1990-2020



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II. CASE STUDY: Lisbon

Exploration of Lisbon: context and trends of social exclusion, forms of coping and innovative community solutions

Authors: IGOT (Franz Buhr, Agustín Cocola-Gant, Eduardo Brito-Henriques)

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Introduction

Lisbon has entered the list of Europe's favourite destinations. Year after year (before the COVID-19 pandemic), Lisbon was breaking records of arrivals, reaching its peak in 2019 with over 5 million nights slept at tourist accommodation establishments (Eurostat 2019). Compared to more mature destinations such as London or Barcelona, Lisbon seems to be a relatively minor case. However, given Lisbon's rapid positioning as a tourist destination and its small population, levels of tourism pressure have increased by 88% from 2008 to 2018 (D.2.2 SMARTDEST, 57), making tourists an inescapable element of the cityscape.

Yet, the buzz around Lisbon is a fairly new phenomenon. The recent history of tourism in the city was off to a slow start. The very first efforts to promote Lisbon as a tourist destination began in the mid-1990s (Safara & Brito-Henriques 2017), when Lisbon was nominated European Capital of Culture and important investments in museum renovations took place. However, the 1998 Lisbon World Exposition is usually referred to as the kick-off to a new tourism era for the city, which was followed by successive investments in urban infrastructures, riverside rehabilitation and new cultural equipment. In 2004, Portugal hosted the UEFA football tournament and Lisbon was again under the radar of international visitors. But it was only in the aftermath of the **2008 financial crisis** that tourism in Lisbon took the magnitude it has today (Malet-Calvo, Gago & Cocola-Gant 2018).

The series of actions and reforms carried out by the Portuguese State in order to tackle the economic recession, gave tourism a decisive push. The Portuguese State, but also the Lisbon Municipality took then a more active role in the promotion of Lisbon as a desirable destination. City marketing initiatives met a favourable geopolitical context, in which the instability of tourism destinations in the Maghreb, Egypt and the Middle East in the late 2000s and early 2010s channelled tourists to the northern side of the Mediterranean region (Basu & Marg 2010).

The number of airport arrivals increased by 233% from 2000 to 2019 (*see Figure 2*). The city had 93 hotels in 2009; in 2019, this number amounted to 224 (INE 2020). Cruise ships brought 164,000 passengers to Lisbon in 2002, and in 2019, 571,000 (Porto de Lisboa 2020). The city's airport was remodelled and expanded several times in the past years, and gained a second terminal for low cost airlines (2007). EasyJet began its operations in Lisbon in 2011; Ryanair in 2013. Tuk-tuk cars mushroomed in the city from 2012 onwards and Lisbon was awarded Europe's Leading City Break Destination (2009, 2010, 2013), Europe's Leading Cruise Destination (2009, 2014, 2016, 2017) and, in 2017, **World's Leading City Break Destination**.

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Figure 2: Number of passenger arrivals per year at Lisbon Airport. Source: Lisbon Airport (2020)

Lisbon is now a touristic city, which means that the tourism sector plays now a central role in the city's economic activity. In 2018, tourism generated more than 14,7 billion euros in revenue (20% of the region's GDP) and was responsible for 15,4% of all employment in the region (Turismo de Lisboa 2019). The growing dependence on the tourism industry was largely pointed as the driving force behind the 'Portuguese miracle' (The Economist 2017), but has now exposed its fragility, as the COVID-19 pandemic made clear.

The city's worldwide promotion as a tourist destination fed into other initiatives aiming to increase the city's competitiveness. Municipal programmes such as the creation of the Economy and Innovation Department (2011), Start-up Lisboa (2012), and Lisbon's Creative Economy initiative (2013) were designed to attract global talents and to function as start-up incubators. The Web Summit, the largest tech event in the world and originally held in Dublin moved permanently to Lisbon in 2016 and brought thousands of high technology industry experts every year to the city. Moreover, the Study in Lisbon platform (2014) launched by the city council aims to consolidate Lisbon as an Erasmus and study-abroad destination.

Alongside tourists, gig economy workers and international students, Lisbon became increasingly attractive also to international investors, second-home owners and retirees coming from EU and non-EU countries. This relates to a number of policy changes undertaken by the Portuguese State aiming to help the country's economic recovery. New policies created regimes of low taxation for EU citizens (Non-habitual Residents programme, 2009), which attracted a considerable numbers of retirees from Northern Europe; they also offered easy access to Portuguese citizenship to non-EU applicants wishing to buy properties for at least 500,000 euros or invest 350,000 euros in property for rehabilitation (Golden Visa programme, 2012); but also implemented structural changes in the housing sector, deregulating the private rental market (New Urban Lease Law, 2012), making it particularly attractive to private capital.

These multiple trends in tourism-related mobilities seem to have turned Lisbon into a **hub** where various kinds of **mobile lifestyles** now intersect and interact: tourists (groups of friends travelling, couples, families and weekend breakers), digital nomads (professionals working remotely and not tied to any particular location), international students (Erasmus or enrolled in full degrees), lifestyle migrants (sun seekers, transnational elite, bohemian nomads, etc.), second-home owners, retirees, international investors, expats, entrepreneurs, etc.

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These more transient populations are a major force driving economic, but also social and spatial change in Lisbon. They have entered the housing market (as owners, renters or investors); they are users of urban public space, transport and technologies; they attend local events, frequent restaurants and cafés; they share public and private spaces with previous residents and/or establish more or less exclusive circuits of sociability. In all cases, their lifestyles and consumptions patterns are embedded in **urban infrastructures** which both feed and are fed by their presence: from souvenir shops and new craft beer bars, to upscale dinner venues and coworking office facilities, among others.

This exploration report focuses on **two pressing issues** emerging from the growing presence and impact of transient and tourism-related populations in Lisbon. The first issue addressed is **housing**. The impact of these transient populations on the housing market is not limited to increased competition for renting or buying homes, nor is it only a matter of income differentials when compared to Lisbon residents' average earnings. The promotion of Lisbon as an ideal destination (for tourism, investment or temporary residence) happened hand-in-hand with liberalisation of the housing market, which did not only attract real estate investors, but also paved the way for the functioning of short-term rentals (such as Airbnb and Booking), critical infrastructures backing all sorts of tourism-led mobilities.

Adding to an already particular housing market context (in which rents had been frozen for decades, contracts established for a lifetime and the inner city districts presented enormous rent gaps), there is evidence that tourism and lifestyle migration have played a decisive role in processes of **gentrification** (Cocola-Gant & Gago 2019, Barata-Salgueiro, Mendes & Guimarães 2017). The socio-demographic change in historical neighbourhoods is being documented and class-driven and tourism-driven displacement are pointed as key drivers of housing deficit and unaffordability.

The second topic explored in this report is **retail transformation** and, more specifically, proliferation of spaces dedicated to the sale and consumption of food and beverage. The transformation of central areas into spaces of consumption and leisure is a well-known pattern of touristic cities. Yet, tourists are not only interested in chain stores and souvenir shops. Urban tourists and the growing mobile lifestyle residents in Lisbon seem to be looking for places also deemed attractive to local middle-classes, hipsters and young creatives (Gravari-Barbas & Guinand 2017).

The very recent pop-up of dozens of craft beer bars, specialty coffee shops, vegan diners, artisanal bakeries, and other gourmet food amenities in Lisbon signals the modernisation and upscaling of the city's commercial landscape, but it is also deeply linked to new consumption practices of local and visiting youngsters, foodies and transnational gentrifiers. **Retail gentrification**, **foodification** (Loda, Bonati & Puttilli 2020) and "***boutiquing***" (Zukin et al. 2009) pose challenges to urban neighbourhoods as businesses converge towards specialised market niches and threaten the permanence of businesses deemed more fundamental to more stable residents.

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1 Contextual dimensions and main trends

Population

Table 2 (below) contrasts Lisbon and its historic centre with demographic data collected by the 2011 census survey (last census conducted in Portugal). It shows that the city centre has an overrepresentation of older and less formally educated population. *Table 3* presents the numbers of foreign nationals living in Lisbon, in order of main origin countries, in 2011 and 2019. These numbers are likely to be underestimated as they do not include undocumented third-country nationals, nor EU-citizens who did not register as local residents. Yet, it is possible to note a significant increase in the number of EU-nationals living in Lisbon in 2019. There is also growing evidence of a more diverse composition of the Brazilian immigrant population, including middle-class and upper middle-class migrants (Biasutti 2020, Souza & Iorio 2018).

		Lisbon	Historic centre
TOTAL POPULATION		**547.733**	**40.577**
Age cohorts	**0 - 14 years**	70.494 **12,87%**	4.122 **10,16%**
	15 - 24 years	53.507 **9,77%**	3.413 **8,41%**
	25 - 64 years	292.772 **53,45%**	22.726 **56,01%**
	65 + years	130.960 **23,91%**	10.316 **25,42%**
Formal education levels	**None**	48.798 **8,91%**	3.873 **9,54%**
	Primary	232.336 **42,42%**	19.582 **48,26%**
	Secondary	89.109 **16,27%**	7.067 **17,42%**
	Higher	177.490 **32,40%**	10.055 **24,78%**

Table 2: Age cohorts and formal education levels (Lisbon; historic centre). Source: INE, Census 2011.

2011				**2019**			
		Number of foreign resident permits				Number of foreign resident permits	
	Lisbon	**45.626**			**Lisbon**	**98.841**	
	Main origin countries*				**Main origin countries***		
1	Brazil	12.940	**28,36%**	1	Brazil	16.962	**17,16%**
2	Cape Verde	3.657	**8,02%**	2	China	9.527	**9,64%**
3	China	3.436	**7,53%**	3	Nepal	7.707	**7,80%**
4	Romenia	3.199	**7,01%**	4	France	7.319	**7,40%**
5	Ukraine	2.429	**5,32%**	5	Italy	7.059	**7,14%**
6	Angola	2.009	**4,40%**	6	Bangladesh	4.707	**4,76%**
7	India	1.784	**3,91%**	7	Spain	4.444	**4,50%**
8	Spain	1.579	**3,46%**	8	Germany	3.806	**3,85%**
9	Guinea Bissau	1.567	**3,43%**	9	India	3.260	**3,30%**
10	Italy	1.193	**2,61%**	10	Angola	2.722	**2,75%**

*Table 3: Number of foreign resident permits (total; per main nationality). Source: SEF, 2020. * Numbers for EU nationals are based on declaration of residence.*

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Politics

The Municipality of Lisbon is currently led by Fernando Medina, from the Socialist Party, but was previously run by António Costa, from the same party, now Portugal's Prime minister (*see Table 4*). Despite the fact that the current national government is composed of a coalition of left-wing parties, at the highest political level there is a strongly established consensus that tourism should be seen as a central development strategy, both city- and country-wise. Such common agreement became especially evident after the 2008 financial crisis, when tourism and foreign investment were needed as instruments for economic recovery. This gave way to several liberalisation programmes, particularly in the tourism and housing sector (as we mention throughout the report). The promotion of Lisbon as a touristic, green, start-up, student and creative city has been carried out under the socialist administration.

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Lisbon	**António Costa (Socialist Party)**									**Fernando Medina (Socialist Party)**				
Portugal	**José Sócrates (Socialist Party)**					**Passos Coelho (Social Democrat Party)**				**António Costa (Socialist Party)**				

Table 4: Name and party of Lisbon mayors and Portugal's Prime-minister (2007-2020)

Economic indicators

The economic indicators presented below characterise Lisbon and its metropolitan area as the most dynamic and economically diverse area of the country. The numbers demonstrate the prominence of the service sector, financial sector and tourism/restaurant-related activities. The Lisbon Metropolitan Area is responsible for 36% of the country's GDP, and 87% of the region's economic activity (in terms of Gross Value Added) stem from the tertiary sector.

	Lisbon (AML)	Relation of the region with the country
GDP (Gross domestic product)	**73.334** (million €)	**36%** (Weight of the Region in the country)
GVA (Gross Value added)	**63.398** (million €)	**36%** (Weight of the Region in the country)
Employment*	**1.437** (thousands)	**29,2%** (Weight of the Region in the country)
GDP per capita PIB a)	**25,8** (thousands €)	**1,3** (Ratio Region/country)
Apparent labour productivity (GVA/Employment)a)b)	**44,1** (thousands €)	**1,2** (Ratio Region/country)

Table 5: Economic indicators for Lisbon Metropolitan Area 2018. Source: The Economy of Lisbon in Figures 2020, Lisbon City Council.

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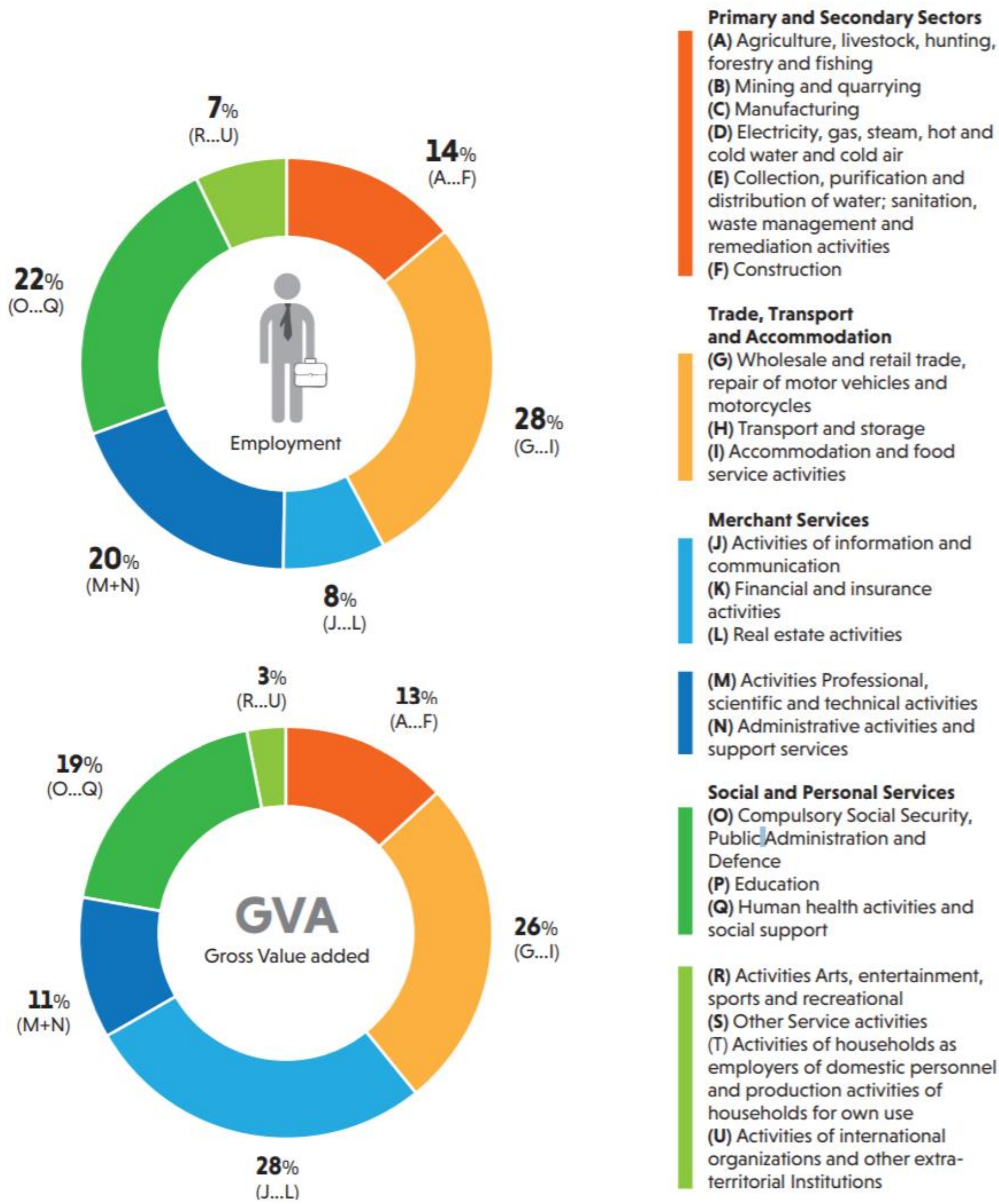

Figure 3: Profile of economic activities in Lisbon Metropolitan Area 2017. Source: The Economy of Lisbon in Figures 2020, Lisbon City Council.

Housing

Table 5 provides data on the occupancy of residential units (2011). The historic centre has again an overrepresentation of vacant housing units. *Table 8* (in section 2) also shows how the city centre has relatively higher numbers of buildings in poor and very poor conservation conditions. *Figure 4* presents the number of licenses issued for new constructions and rehabilitation works for the whole city, from 2008 to 2019, while *Figure 5* contrasts the average monthly net income in the Lisbon region with the square metre prices for housing acquisition (from 2011 to 2020). There is strong evidence (Seixas & Antunes 2019) that housing costs now take up well beyond the maximum recommended rate of 40% of people’s disposable income (OECD 2019).

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	Lisbon	Historic centre
Housing units	322.865	31.554
Vacant housing units	50.209 **15,55%**	8.365 **26,51%**

Table 6: Occupancy of housing units. Source: INE, Census 2011

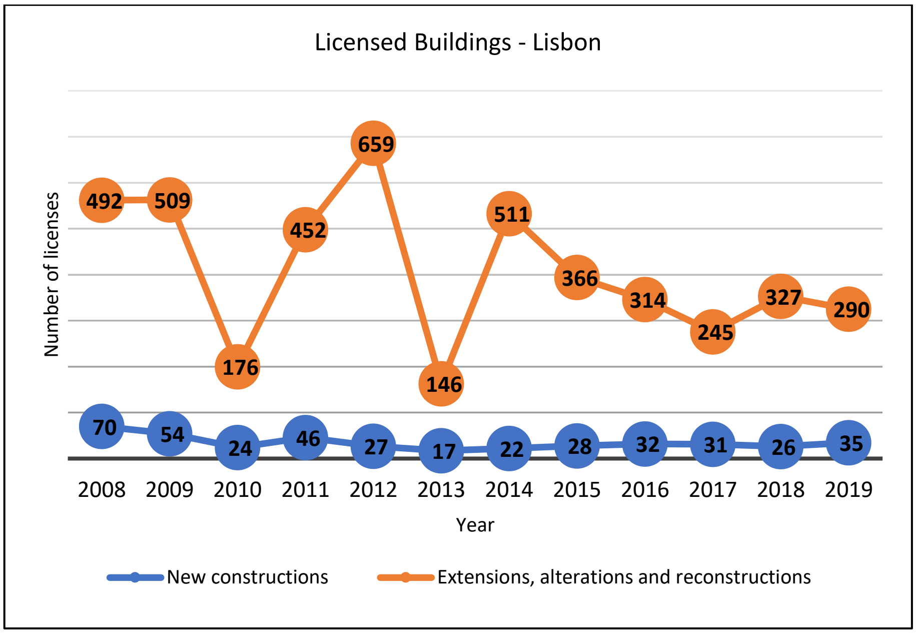

Figure 4: Number of licenses issued for new constructions and rehabilitation (Lisbon). Source: INE, Census 2011.

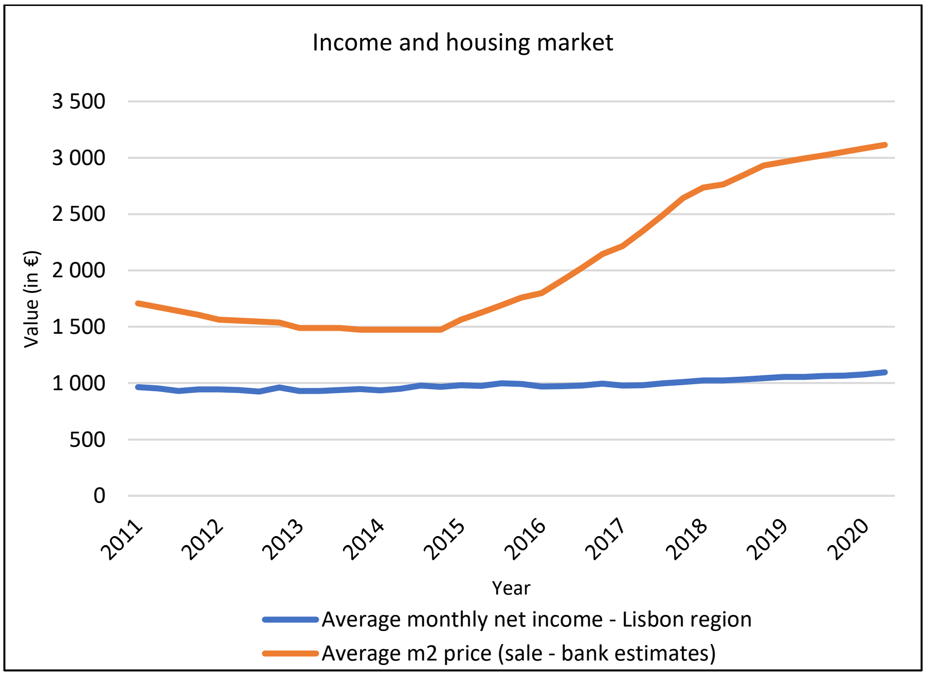

Figure 5: Comparison of average income earnings and the evolution of housing market (sqm price, sale), for the Lisbon region. Source: INE (2020).

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Tourism

Table 7 shows the number of overnight stays in Lisbon from the period of 2009 to 2019. The accumulated increase throughout the decade reaches the rate of 144%. It also shows the average length of stay in the city, which has not changed significantly over the years, which seems to consolidate Lisbon as mainly a city-break destination. *Figure 6* presents the numbers of cruise passenger arrivals in the Port of Lisbon, from 2002 to 2019. *Figure 7* compares the number of hotels and short-term accommodation units in Lisbon, from 2002 to 2019. It is worth mentioning that the Portuguese official statistics office (INE) only collects data on short-term accommodation providing 10 or more beds (the equivalent of hostels or large Airbnb listings).

Year	Overnight stays	Variation of overnight stays (in relation to previous year)	Average length of stay (days)
2009	5.715.176	-4,36%	2,1
2010	6.190.588	8,32%	2,2
2011	6.419.256	3,69%	2,2
2012	6.789.166	5,76%	2,3
2013	7.454.655	9,80%	2,3
2014	9.008.523	20,84%	2,4
2015	9.999.851	11,00%	2,4
2016	11.066.130	10,66%	2,4
2017	12.553.476	13,44%	2,4
2018	13.184.470	5,03%	2,4
2019	13.985.262	6,07%	2,3

Table 7: Number of overnight stays in Lisbon and variation; average length of stay in Lisbon (in days). Source: INE (2020).

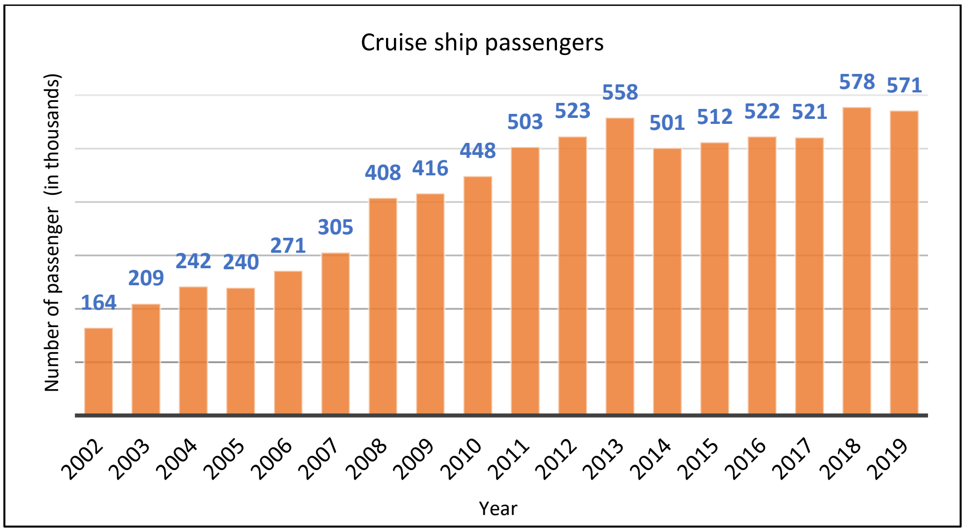

Figure 6: Number of cruise ship passenger arrivals in Lisbon (per year). Source: Porto de Lisboa, 2020.

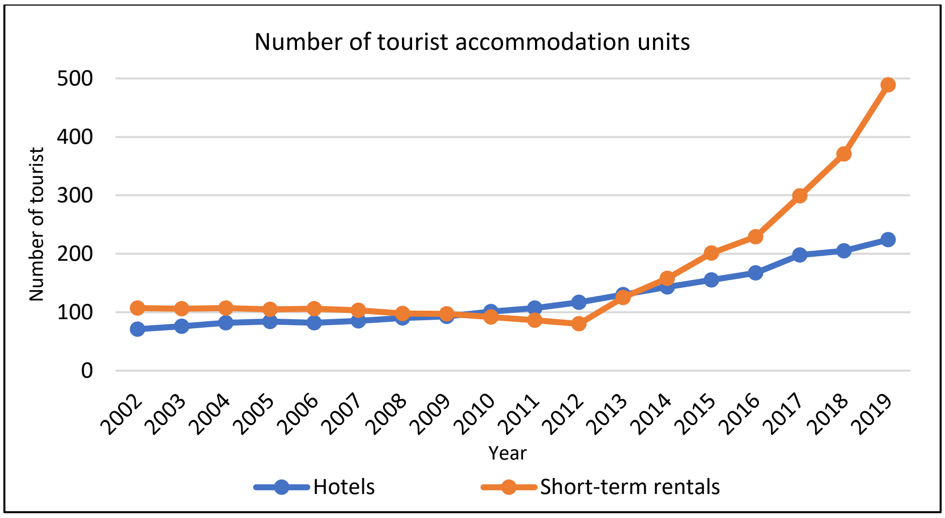

*Figure 7: Number of tourist accommodation units in Lisbon (per year). Source: INE (2020) *INE (National Statistic Office) only considers 10-bed or + short-term rental units.*

2 Housing

The increasing intake of tourists and other relatively transient populations has interacted with Lisbon’s housing market in complex ways. From 2014 to 2018, 46 new hotels opened in Lisbon, and other 61 were scheduled to be inaugurated between 2019 and 2021 (Turismo de Lisboa 2019) (see *Figure 8*). Most of the new hotels are 5 or 4-star facilities, occupying former residential buildings, rehabilitated buildings, but also historical buildings sold to private investors by the Municipality or by the Portuguese State. Nevertheless, the use of new technologies for finding accommodation and digital platforms such as Airbnb have taken the impact of tourism-led mobilities to the core of the local housing market in an unprecedented way.

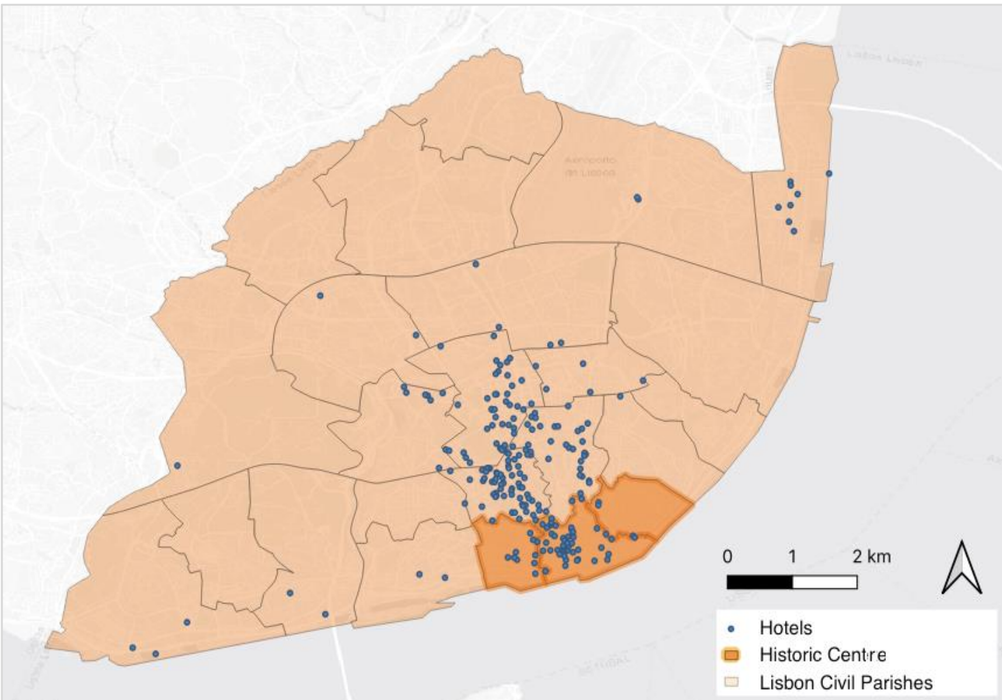

Figure 8: Location of all hotels in Lisbon (2020). Source: Turismo de Portugal.

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According to the consultancy Moody's (Haviland 2019), the Portuguese capital has been among the fastest-growing markets for short-term rentals in Europe to the degree that Lisbon is the European city with the highest ratio of homes listed on Airbnb per 1,000 inhabitants. In the entire municipality of Lisbon this ratio is 30 homes per 1,000 residents. However, the geography of short-term rentals is uneven, and the supply of Airbnb is highly concentrated in the historic centre. Relying on data from Inside Airbnb, in March 2020 the supply of Airbnb in Lisbon was 17,900 listings, of which 13,400 were located in the historic centre (*Figure* 9). This data also shows that 85% of listings were entire homes available for more than 60 days per year, indicating a high degree of commercial listings and a potential loss of housing into the short-term rental market.

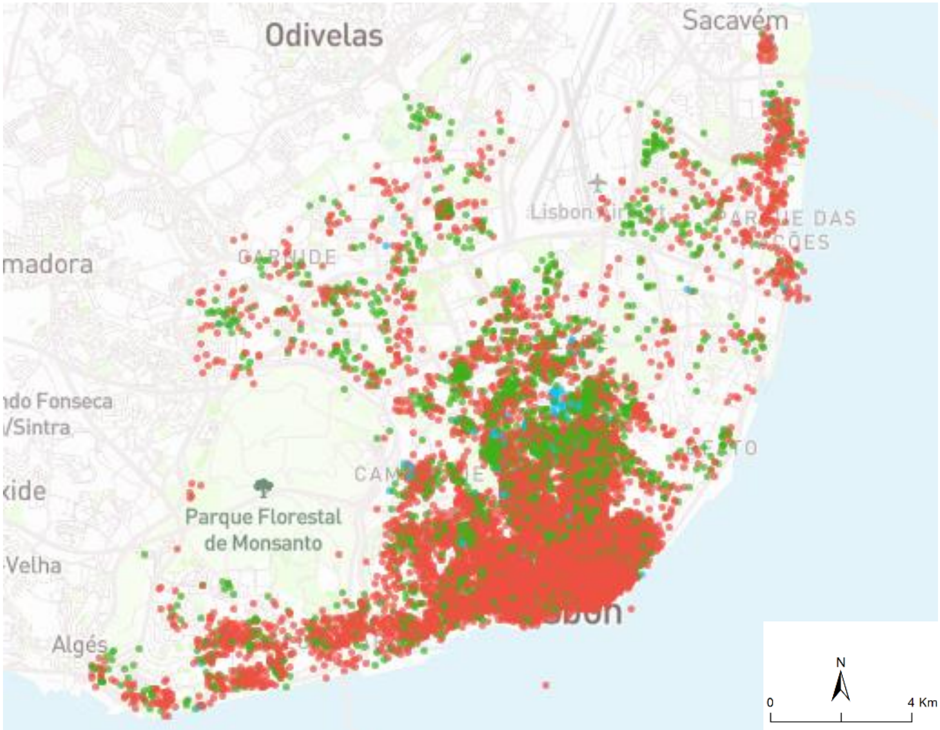

Figure 9: Location of all Airbnb listings in Lisbon. In green: private rooms; in red: entire units. Source: Inside Airbnb (2020).

To understand the degree of the tourism-led impact over Lisbon's housing market, two key aspects deserve attention: on the one side, the historical specificities of the local market, which include decades of frozen rents and automatic contract renewal, precarious inner-city housing, lack of investment in historical neighbourhoods, and the creation of new urban centralities, away from the old city centre. On the other side, a recent series of policies aiming to liberalise the housing market, and to promote rehabilitation, tourism and real estate investment (Seixas & Antunes 2019). Together, these two aspects have given rise to a new urban model of tourist-driven inner-city gentrification in contrast to the earlier pattern of suburban expansion (Lestegás 2019).

Decades of disinvestment in the built environment resulted in a multitude of run-down buildings. The need for urban rehabilitation were evident when the 2008 recession hit, and it got even worse in the harsh scenario of bankruptcies, 'ghost' buildings, and real estate crisis. In 2011, 790 residential buildings were awaiting demolition in the city and almost 12,000 properties needed urgent interventions, with an estimated 8 billion euros needed for their rehabilitation (Brito-

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Henriques 2017). Lisbon's derelict properties are predominantly located in the historical districts (*see Table 8*). Central neighbourhoods lacked public investments and several buildings (in Alfama and Mouraria, two of the most visited neighbourhoods today) even lacked access to proper sanitary infrastructure. Private rehabilitation was virtually impossible, as rents could not be substantially updated since 1948, and property owners did not renovate facades or fixed structural issues. Demographically, the centre was going through depopulation and ageing processes, and middle-classes preferred to live in more modern neighbourhoods and in the suburbs (*see Table 9*). As a result, between 1981 and 2011, Lisbon lost almost a third of its population, and the number of housing units without occupants increased by 208%, rising to more than 50,000 unoccupied homes (Brito-Henriques 2017).

		Lisbon	**Historic centre**
Total number of buildings		52.496	7.026
State of conservation	**Good state**	28.408 **54,11%**	2.635 **37,50%**
	In need of repair	24.088 **45,89%**	4.391 **62,50%**

Table 8: State of conservation of buildings (Lisbon; historic centre). Source: INE, Census 2011.

Total population		**Age cohorts** 0 - 14 years		15 - 24 years		25 - 64 years		65 + years	
Lisbon	547.733	70.494	**12,87%**	53.507	**9,77%**	292.772	**53,45%**	130.960	**23,91%**
Historic centre	40.577	4.122	**10,16%**	3.413	**8,41%**	22.726	**56,01%**	10.316	**25,42%**

Table 9: Age cohorts (Lisbon; historic centre). Source: INE, Census 2011.

Being hardly hit by the 2008 financial crisis, Portugal implemented a series of reforms under recommendation of the European Commission, the European Central Bank and the International Monetary Fund. In 2012, a change in existing legislation made it mandatory for all rent contracts to transition to the 2006 New Urban Lease Law. This entailed a significant raise in rent prices, the possibility to sign short-term contracts, and facilitated evictions. The **liberalisation of the rental market** turned it into a highly profitable activity, attracting national and international private investment (Mendes 2018). In parallel, new regimes easing **urban rehabilitation** were established (2009, 2013, 2014). These programmes gave fiscal benefits to private investors triggering flows of capital into the rehabilitation of historic fabrics. One of these programmes, '*Reabilita primeiro, paga depois*' (Rehabilitate first, pay later), for example, allowed private investors to purchase hundreds of derelict municipal buildings, rehabilitate them, and only pay the municipality once businesses were lucrative. As noted by Calvo, Gago and Cocola-Gant (2018), most of the rehabilitated initiatives gave place to tourist accommodation facilities.

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Among Portugal's strategies for economic recovery were also two actions aiming to attract foreign investment: the Non-habitual Residents programme (2009) and the Golden Visa scheme (2012). The first programme offered **full tax exemption** for up to 10 years on passive income earned outside Portugal, attracting **retirees** from other EU-countries who often relocated to Portugal or bought second-homes. The Golden Visa scheme, targeting **non-EU investors**, granted applicants with facilitated pathways to Portuguese citizenship and tax reductions in exchange for investment in the country. From 2012 to 2020, the Golden Visa has benefited 9,254 applicants, among which more than **94% invested in real estate acquisition** (SEF 2020).

In a matter of less than 10 years, Lisbon changed from being a provincial, tenant-protected, and cheap housing market to an international residential property investment market, with flexible lease legislation and State-led tax incentives directed to private investors (Montezuma & McGarrigle 2018). Beyond being a safe haven for speculative investment, or providing second-homes to well-off migrants, Lisbon's housing market, on the one hand, has been used as tourist accommodation and, on the other, began to attract the attention of Erasmus students, corporate expatriates and tech professionals with higher incomes than the locally employed population. The role of Airbnb and other mid-term digital platforms such as Uniplaces, NomadX, or Spotahome - oiled the housing market transformation, catering for a growing tourist demand, but also for other temporary populations (Cocola-Gant & Gago 2019).

As a consequence, within the city limits**, housing prices have raised 55,5% only in the last 3 years** (INE 2020). Yet, different dynamics take place in specific neighbourhoods. In Alfama, for instance, one of the oldest and most visited districts, **25%** of the existing real estate functions as tourist accommodation (Cocola-Gant & Gago 2019). This entails an intense process of spatial and social change: from the dismantling of neighbours' support networks, depopulation, and changes in the commercial offer and services available, to noise, increased cost of life and displacement.

While housing prices in the city have risen by 55,5% in the last 3 years, the **minimum salary** grew only by 7,7% in the same period, from 557 euros in 2017 to 600 euros in 2019. There is a clear disconnection of housing prices and local salaries, the former catering to a global demand but unaffordable for local communities. At present, 17,7% of the city's workers earn less than 600 euros, and almost 30% earn between 600 and 900 euros (DGERT 2019). In 2018, **paying rent in Lisbon took 67% of an average family's revenue** (Seixas & Antunes 2019). According to the 2019 World Prices report by the Deutsche Bank, Lisbon is the European city with the highest effort rate that a household must do to access housing (Deutsche Bank, 2019). In a context of increasing cost of life and **prohibitive housing prices**, local populations have faced evictions and housing shortage, or else have resorted to sharing apartments or postponing leaving their parents' homes. Protests and organisations working against evictions, in favour of the right to the city and of accessible housing (Morar em Lisboa, Aqui mora gente, STOP despejos, among others) have popped up in the last few years, and have questioned the impacts of an unregulated tourism and the government's investment policies.

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2.1 Chronology

This chronology summarizes the main policy changes and urban transformations setting the ground for a growing pressure over the local housing market. Tourism, real estate investment schemes and rehabilitation programmes are fundamental elements of this trend. More elements are presented in the case study general timeline (see *Appendix*).

2009	Non-habitual Residents programme
	Urban rehabilitation (new regime)
	First Airbnb listing in Lisbon
2011	EasyJet starts operating in Lisbon
2012	Changes to the New Urban Lease Law
	Golden Visa Scheme
2013	Ryanair starts operating in Lisbon
2014	Short-term rentals law
	Exceptional law for the promotion of urban rehabilitation
2016	Ampliation and renovation works at Lisbon's airport
2017	Opening of new cruise ship terminal
2018	Rock in Riot protest

2.2 Coping strategies and initiatives

Housing has become one of the most pressing social issues in current Lisbon. A number of anti-displacement social movements and platforms have emerged (Mendes 2020), and neighbours' associations have often voiced serious concerns about housing unaffordability, place transformation and (illegal) evictions. Real estate bullying has also been noticed in touristic districts in Lisbon – when developers and owners push old tenants to leave their current accommodation. Yet, social movements have not established an anti-tourism narrative, rather focusing on anti-austerity and anti-displacement measures (with a few exceptions, such as in the Rock in Riot protests in 2018, and the 'Lisboa does not love' Facebook page, where tourism is seen a driver of social exclusion) (see Mendes 2020).

There have been public programmes supporting housing provision and relocation (such as PER and PROHABITA), and actions to help young people pay rent (IAJ and Porta 65). The municipality has also begun an active policy to acquire formerly private units and convert them into public housing for middle-income families and individuals (Programa Renda Convencionada). Social movements argue that these programmes are insufficient and do not alter the structural production of housing unavailability and unaffordability.

As a result, young adults leave their parents' homes even later (40% of young adults aged from 25 to 34 years in Portugal still live with their parents) (Eurostat 2019). Cohabitation is also a strategy adopted in order to split the high costs of accommodation in Lisbon.

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2.3 Key stakeholders

Stakeholder	Type	Description
Housing and local development Office	Public sector	Municipality's dedicated office
Habita	Civil society	Association for the right to the city
Morar Lisboa	Civil society	Association for the right to the city
STOP Despejos	Civil society	Anti-eviction social movement
Aqui mora gente	Civil society	Misericórdia's resident association
Left-hand Rotation	Civil society	Art-based collective for the right to the city
Neighbours' associations	Civil society	Various
Real estate agencies	Private sector	
SMARTOUR	Academia	Research project on tourism and short-term rentals in Portugal

2.4 Related sub-issues

- Gentrification
- Touristification
- Spatial justice and the right to the city
- Evictions
- Sense of belonging
- Networks of support
- 'Disneyfication' of neighbourhoods (places as theme parks)

2.5 Summary and outlook

New dynamics have changed Lisbon's housing market from being a provincial, tenant-protected, and cheap housing market into an international residential property investment one. In less than 10 years, the Portuguese state has implemented a series of liberalising policies which made lease legislation more flexible; it also provided various tax incentives directed to private investors to acquire and rehabilitate real estate. The proliferation of Airbnb and other digital platforms facilitated the process, catering mostly for tourists' and other transient populations' demands. Significant parts of the housing stock were either transformed into short-term rentals, or increased their prices far beyond the purchase capacity of the local population. Housing prices have increasingly decoupled from local realities, and are now largely driven by global real estate investment dynamics.

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3 Commercial landscape transformation

The increasing presence of tourists and other transient populations has reshaped Lisbon's retailscape in several ways. On the one hand, the concentration of tourists in historical neighbourhoods (*see Figure 10*) went hand-in-hand with the mushrooming of typical souvenir and gift shops, local produce and handicraft stores, and 'traditional' food restaurants in those areas. On the other hand, tourists and temporary residents are not limited to 'tourist enclaves' and extend their consumption practices to other urban neighbourhoods and to other retail formats. Although neither one of these aspects has been thoroughly documented, the first has received far more scholarly attention, especially as it intersects with rehabilitation efforts directed to historical districts.

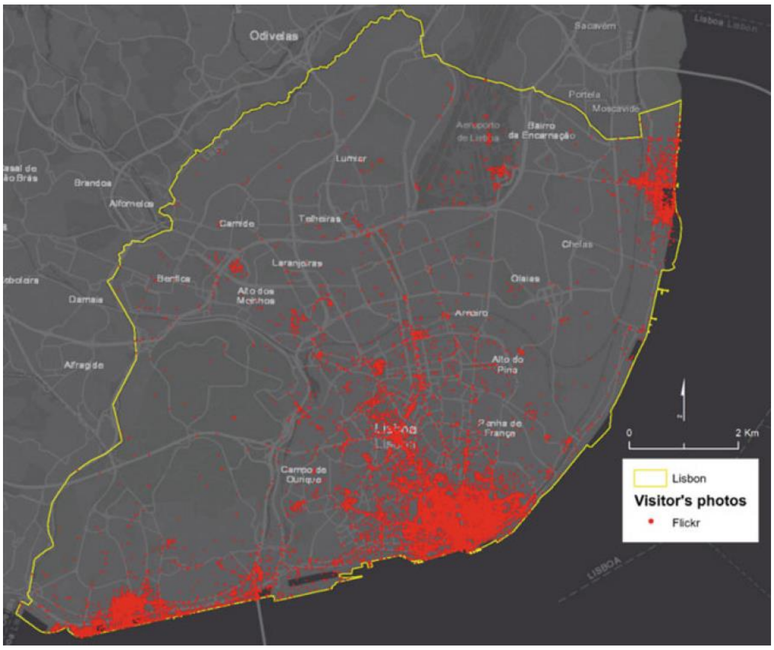

Figure 10: Location of visitors' geotagged photos uploaded to Flickr (2008-2016). Source: Encalada et al. (2019).

The **retail-led rehabilitation** of the Baixa area in Lisbon, for instance, is testament to recent public and private initiatives aiming to modernise its historical retail heritage. Lisbon's traditional commercial centre, Baixa went through a long process of decline, population loss, and closing of stores, as modern shopping malls were created in other parts of the city. From the 1990s onwards, the area and its surroundings became the target of a series of regeneration projects (PROCOM 1994-2001, URBCOM 2000-2008, MODCOM 2005-2010, Comercio Investe 2013-present) (Guimarães 2017). In 2010, the approval of the Municipal Master Plan included a detailed land-use plan for Baixa, aiming to combine the district's residential function with the creation of new commercial areas directed to leisure and tourist consumption (Barata-Salgueiro & Guimarães 2020, 9). The improvement of the physical conditions of former derelict buildings by public and private investment and the rehabilitation of public space was soon 'captured' by tourism-related demands. Nowadays, Baixa is characterised by an overrepresentation of cheap souvenir shops, cafés, and chain stores, which has also caused the displacement of traditional retail formats (Barata-Salgueiro 2017). In the district, 49% of all shops operating in 2015 had opened after 2005, and almost 25% of all shopping facilities were occupied by chain stores (Barata-Salgueiro, Mendes and Guimarães 2017).

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Average tourist expenditure in Lisbon (per day)* - 2019			
	Leisure	**Business**	**Average**
Accommodation	57,18 €	86,21 €	62,15 €
Food	38,56 €	35,82 €	37,60 €
Local attractions	10,99 €	0,81 €	8,86 €
Transport	6,67 €	6,09 €	6,46 €
Other	36,58 €	50,44 €	39,87 €
Global	**149,98 €**	**179,37 €**	**154,93 €**

*Table 9: Average tourist expenditure (Lisbon, per day). Source: Turismo de Lisboa; * Does not include travel costs.*

The transformation of urban neighbourhoods into spaces of leisure and tourist consumption has also been disruptive for residents. As retail becomes **tourist-oriented**, local populations are left with fewer **resident-oriented** businesses, such as local grocery shops, pharmacies, hairdressers, etc. This change in the types of businesses available has been noticed in several Lisbon districts, such as Alfama (Gago 2018), Bairro Alto (, Mendes 2006; Nofre et al. 2017), Cais do Sodré (Nofre et al. 2018), Chiado and Baixa (Barata-Salgueiro 2017; Barata-Salgueiro, Mendes and Guimarães 2017). Moreover, the products and services available are often deemed unaffordable by neighbourhood residents. Ironically, as Cocola-Gant, Gago and Jover (2020) noted, despite the pop-up of trendy bars, cafés and restaurants, residents often complain about not having places to go for an informal drink or meal. As retail produces particular kinds of circulation and socialities, residents of touristic districts often suffer from what David and Lees (2010) called a 'loss of place'. In Lisbon, urban research has been increasingly aware of residents complaining about the proliferation of tourist-oriented businesses and their effects on local liveability (Nofre et al. 2018). Yet, no research project has specifically addressed the indirect residential displacement (Marcuse 1985) that commercial change may have produced.

However, tourists' consumption whereabouts are not always circumscribed to tourist enclaves and may also intersect with other local groups'. Guimarães (2018; 2019) has shown how both tourists and local middle classes play an important role in the gentrification of traditional retail markets in the city. Ribeira market (renamed TimeOut market in 2012, *see Figure 11*), and Campo de Ourique market are examples of the transformation of old city markets into gourmet food halls, attracting tourists but also residents interested in the renewed ambience and cosmopolitan frequentation of such places.

Figure 11: TimeOut market, Cais do Sodré, Lisbon. Source: Jornal Económico (2017).

Beyond the spatialities of commercial offer, recent research has also pointed to specific temporalities of (tourist) consumption. In their accounts about Lisbon's night life, Nofre et al. (2017) demonstrate how Bairro Alto has become a key destination to tourists looking for bars and night-time leisure, while remaining a hotspot for university students, both Portuguese and international. Malet-Calvo, Nofre and Geraldes (2016) ethnographic study of the district's so-called 'Erasmus corner' highlights the interconnectedness between the ever-expanding bar and music venue-industry, and parallel processes of touristification and studentification of the city. From a similar perspective, Nofre et al. (2018) show how the Cais do Sodré neighbourhood has been transformed from a run-down harbour district, long characterised by crime, prostitution and petty drug dealing, into the new epicentre of nightlife in Lisbon. In their study, Nofre et al. provide evidence of the active municipal strategy to expand the number of licences given to bars, music venues, restaurants, and cafés in the neighbourhood, combining urban rehabilitation, creative culture, night-time economy and tourism as strategic economic vectors.

3.1 Chronology

This list brings together key urban infrastructures and events signalling Lisbon's capacity to accommodate and attract new consumption patterns and mobile lifestyles. More elements are presented in the case study general timeline (Appendix).

2008	Opening of Lx Factory (Alcântara)
2010	Creation of Cowork Lisboa (Lx Factory), Portugal's first coworking space
2012	Creation of StartUp Lisboa, first start-up incubator in the country
2013	Creation of Lisbon's 'Pink Street' in Cais do Sodré
2014	Opening of TimeOut Market
2015	Opening of Copenhagen Coffee Lab and Fábrica Coffee Roasters (first specialty coffee shops in Lisbon)
	Opening of Dois Corvos Tap Room (first artisanal brewery, Marvila)
2016	First Web Summit Conference in Lisbon
2017	Creation of NomadX (first digital nomads service company)
2018	First Lisbon Coffee Fest (Lx Factory)

3.2 Coping strategies and initiatives

The rapid reorganisation of commercial activities around tourism consumption has deeply impacted central neighbourhoods in Lisbon. Overrepresentation of tourist-oriented businesses in detriment of resident-oriented ones disrupts the liveability of local populations. Created in 2010, the Bairro Alto residents' association (AMBA), for instance, has constantly claimed more commercial diversity (grocery shops, small repair shops, pharmacies etc.) in face of the hyper-specialisation of the district around bars and nightlife.

The specialisation of retail for tourist demands often also entails the displacement or disappearance of traditional local shops. In order to protect historic shops, the municipality created the programme *Lojas com História* (Shops with history) in 2015, which recognises certain shops' importance to the city's identity and character. Moreover, it provides them with financial aid to preserve their genuine characteristics. It has been argued, though, that the programme does not actually prevent the closure of traditional shops, but rather postpone it (Barata-Salgueiro & Guimarães 2020, 13).

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In 2015, the 12-month SAFE!N project was approved by Lisbon City Council. The project was designed as a community intervention for the Cais do Sodré neighbourhood, a district which saw a recent upsurge in nightlife and commercial venues. The project aimed at improving public health, safety conditions and community liveability for residents and visitors. Yet, it was deemed insufficient by the local population and suffered from lack of regulation enforcement (Nofre et al. 2018).

Throughout 2019, the Morar em Lisboa movement promoted several debates and interventions regarding municipal plans to transform one of the historic centre's main squares (Martim Moniz) into a shopping complex. Social mobilisation has managed to stop the renewal, and the square is currently awaiting a more inclusive project proposal.

3.3 Key stakeholders

Stakeholder	Type	Description
Civil parish administration offices	Public sector	Local management
Residents' associations	Civil society	Various concerned neighbourhoods
Digital nomad groups	Civil society	Social network
Shop owners	Private sector	Various
AHRESP (Assoc. of hotels, restaurants and bars)	Private sector	Main sector association
LXNights	Academia	Research and action project on urban night life
ROCK	Academia	H2020 project on heritage and creative cities
TripAdvisor, Yelp, Zomato	Other	User-generated content urban platforms

3.4 Related sub-issues

- Commercial gentrification
- Hipster and millennial economy
- Urban culture
- Urban tourism
- New middle-classes
- Lifestyle mobilities

3.5 Summary and outlook

Unprecedented numbers of tourist arrivals have reorganised the retailscape of Lisbon's central districts. Policies aiming to rehabilitate traditional commercial areas took place alongside a growing demand for tourist-oriented businesses, which produced highly specialised commercial zoning, where souvenir shops, chain stores, 'traditional food' restaurants and bars are overrepresented. Displacement related to touristic pressure may have a residential facet, as discussed in item 2 of this report, but also a commercial one, as small local shops gradually see their usual costumers go away.

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Meanwhile, the presence of an increasingly mobile population and a change in middle-classes' consumption patterns have created in Lisbon a relatively privileged cosmopolitan clientele. The leisure and commercial spaces where tourists, residents and university students interact have gathered increasing attention. Yet, the consumption geographies of other mobile populations (such as digital nomads, expats, and lifestyle migrants) remain to be studied.

4 Trends during COVID and perspectives on the "recovery period"

The impact of the COVID-19 crisis in Lisbon has been severe. In October 2020, Portugal's national bank estimated a recession of 8,1% for the country's GDP (Banco de Portugal 2020). Regarding the tourism industry, restrictions imposed on international (and national) mobilities drove tourists' visits to unprecedented low levels (*see Table 10*), producing immediate effects on the city's economic and social life. In May 2020, airport arrivals dropped 98% compared to the same period in 2019. According to the national Association of Hotels and Restaurants (AHRESP), 22% of accommodation businesses saw a decrease of more than 90% in occupancy rates in August 2020, and 16% were on the verge of bankruptcy (AHRESP 2020b). Short-term rentals faced similar contractions. According to AirDNA, a platform collecting data on Airbnb and Vrbo short-term accommodations, the occupancy rate in the city fell 63% from October 2019 to May 2020 (AirDNA 2020).

Description		Unit	August 2019	August 2020	Variation
Passenger arrivals - Lisbon Airport		N. of passengers	1.536.173	426.999	-72%
Passenger departures - Lisbon Airport		N. of passengers	1.593.964	449.584	-72%
Cruiseship arrivals - Lisbon Port		N. of passengers	31.908	0	-100%
Guests in tourist accommodation - Lisbon Metropolitan Area		N.	832.926	278.974	-67%
Overnight stays in tourist accommodation - Lisbon Metropolitan Area		N.	2.057.193	646.391	-69%
Turnover at tourist accommodation - Lisbon Metropolitan Area		€ (thousands)	138.527	39.037	-72%
Creation of new companies - Lisbon Metropolitan Area	Accommodation	N.	24	18	-25%
	Restaurants/bars	N.	78	88	13%
Closing of existing companies - Lisbon Metropolitan Area	Accommodation	N.	4	3	-24%
	Restaurants/bars	N.	33	34	3%

Table 10: Effects of COVID-19 on Lisbon tourism industry. Source: INE and Porto de Lisboa (2020).

In March 2020, Lisbon approved a new programme entitled ***Renda Segura*** (Safe rent), by which the municipality signed five-year leases for empty apartments. These properties were then made available at lower prices to individuals and families fitting the criteria for subsidised housing. The municipality pays market-level prices to landlords, who keep apartments fully furnished and equipped, and thus have guaranteed returns for their properties. By July 2020, 177 units had been accepted by the programme, of which only 45 were formerly used as short-term rentals ('Renda Segura: Primeira consulta ao mercado com 177 candidaturas' 2020). Some Airbnb

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landlords fear that by taking part in the programme their short-term rental licences would be revoked (Minder & Abdul 2020).

Regarding Lisbon's commercial landscape, the pandemic has hit both tourist- and resident-oriented businesses. Once authorised to reopen, restaurants and bars, even adjusting to new safety procedures, remained facing reduced attendance. According to the AHRESP August report, 70% of restaurants and bars saw a decline of more than 40% in their average turnover, while 38% of businesses risked insolvency (AHRESP 2020a).

Conclusion and case study entry point

Although Lisbon began its trajectory as a tourist destination in the early 1990s, it was only after the 2008 financial crisis that tourism was given the central role it has today. As both a national and local strategy for economic recovery, tourism promotion took place alongside other important transformations, such as a growing interest for urban tourism, the appearance of low-cost travel, and the emergence of digital platforms such as Airbnb and Booking. In less than 10 years, the liberalisation of the housing market and new policies channelling foreign investment into the city's real estate as a way to promote rehabilitation gave rise to a strong process of touristification.

The financialisation of the local housing market, oiled by short-term rentals, brought housing prices to unaffordable levels. Today, renting an apartment in Lisbon takes 67% of an average local family's income (Seixas & Antunes 2019). As significant parts of the housing stock have been converted into short-term rentals, and local salaries remain well below the European average, access to housing has become a central social issue in the city. A number of community-based, municipal, and academic initiatives have emerged in the last years with the clear intent to understand, resist or mitigate the exclusionary effects tourism and the liberalisation of the housing market have produced in the city.

However, the relationship between tourism/mobile dwelling and retail change in Lisbon remains underexplored. With Lisbon's increasing popularity and fiscal incentives provided by the Portuguese State, other population groups began to settle (permanently or temporarily) in the city. Non-habitual residents and Golden-visa holders add to a number of retirees from Northern European countries, international students, lifestyle migrants, expats and digital nomads. With higher income levels and cultural capital, these populations have produced visible changes in the city's commercial landscape, which have not yet been studied in an integrated manner.

Their preference for more upscale market segments and the search for 'trendy' business formats often bring these populations together with urban tourists looking for 'off-the-beaten-path' venues (Gravari-Barbas & Guinand 2017). Places such as organic food restaurants, vegan apparel shops, or coworking facilities (*Figure 12*) are now emerging in the heart of working-class neighbourhoods, thus raising concerns for commercial gentrification. Inasmuch as it is difficult to distinguish the effects of tourism-led retail gentrification from the commercial gentrification triggered by new local middle-classes (Fuller & Michel 2014), certain businesses become particularly complex to pin down. That is the case of specialty coffee shops, which is the main topic of **SMARTDEST's study case** in the city.

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Specialty coffee shops are a recent format of cafés, which emerged in the early 2000s in the Nordic countries, UK and Australia, and was later disseminated globally. They differ from other coffee bars inasmuch as they serve high-quality, single-origin coffee beans, locally roasted and ground, using professional equipment by trained baristas. Emerging in Lisbon in 2015, by 2020 they amounted to over 50.

In other contexts, these coffee shops have been invariably associated with gentrification processes, hipster economies, and privileged migration (Bantman-Masum 2019; Alkon, Kato & Sbicca 2020). Their ample sitting areas allow customers to plug their computers and work, therefore being crucial infrastructures for the maintenance of particular kinds of mobile lifestyles. Along with coworking offices and hybrid enterprises (combining accommodation provision, co-working and leisure spaces), these coffee shops seem to be part of a wider urban transformation enabling Lisbon to increasingly attract mobile and transient populations.

Figure 12: Instagram announcement of a yoga dinner club at a specialty coffee shop in central Lisbon (August 2020)

As an original research topic, specialty coffee shops are thus a promising entry point for grasping the interplay of various kinds of mobility in Lisbon, and their relationship with commercial gentrification and urban transformation.

The **exploratory research questions** are:

- What is the relationship between the sudden emergence of this business format and the increasing presence of mobile forms of dwelling in Lisbon?
- Who are the owners, the workers and the clientele of these coffee shops?
- What kind of social/labour stratification take place at these precincts?
- How have these places contributed to changing local commercial and neighbourhood dynamics?
- What roles do these coffee shops accomplish in terms of creating and maintaining specific (privileged) urban lifestyles?

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4.1 Fieldwork

Empirical research will consist of three parts: (1) exploratory mapping of all specialty coffee shops in the city and their main characteristics and year/month of opening. This will permit grasping their spatial patterns and selecting specific areas for more in-depth fieldwork (see *Figure 13*); (2) ethnographic observation at selected coffee shops and semi-structured interviews with owners, clients and employees. In-depth interviews will also be carried out with local residents, members of residents' and commercial associations, civil society movements, and public officials working with retail planning. This part is designed to grasp stakeholders' (contradicting) perceptions and to allow a more complex portrayal of the impact of new business trends into local neighbourhoods. It should also capture the commercial and social dynamics taking place at these precincts, and their assemblage of mobile lifestyles; (3) a CityLab (details to be defined).

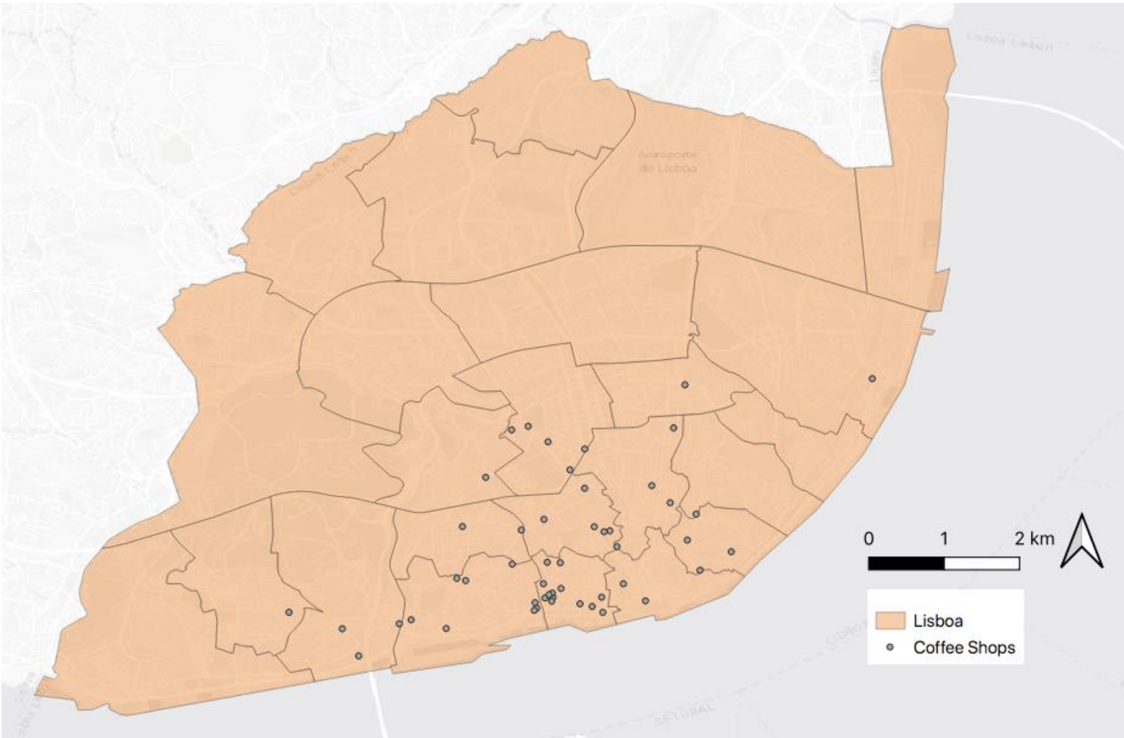

Figure 13: Preliminary location map of all specialty coffee shops operating in Lisbon. Source: authors' own inventory (December 2020)

Fieldwork may include qualitative methods such as in-depth interviews, photo/map elicitation, focus groups, and/or walking interviews. Participants will typically be residents, shop keepers, tourists, digital nomads, lifestyle migrants as well as workers and customers of specialty coffee shops. Participants will be recruited on a purposive sampling logic, and sample size will be determined once research reaches saturation.

No sensitive data will be collected.

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Appendix

Timeline Lisbon: 1990-2020 PreCOVID

		1994	1995	1998	1999	2004	2007	2008	2009	2010	2011
Policy	National	PROCOM						**Urban Regeneration Partnerships programme** **Homestay formalization as non-hotel tourist accomodation**	**Urban rehabilitation** juridical **regime** **Non-Habitual Residents fiscal regime**		**JESSICA** Holding Fund Portugal
	Local									**Municipal Master Plan**	Creation of the **Economy and Innovation Municipal Department**
nfrastructures			**Santo Amaro docklands** renewal	Opening of **Baixa-Chiado Metro** station	Opening of **Armazéns do Chiado**		Opening of **A Vida Portuguesa shop** Opening of **Lisbon's Aeroport Terminal 2** to low costs	Opening of **Lx Factory**	First **Airbnb** listing in Lisbon	Opening of **Cowork Lisboa** (Portugal's first coworking space)	
Events		**European Capital of Culture**		**Expo'98**		**UEFA Euro Cup** **First Rock in Rio Lisboa**	**NOS Alive Festival** first edition				Lisbon became the **20th Easyjet base**
Resistance									Opening of **RDA** association		

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		2012	2013	2014	2015	2016	2017	2018	2019	2020
Policy	**National**	**Golden Visa** programme		**Short-term rentals law** (easier procedures to starting activity)					Legal creation of **Real Estate Investment Trusts** (SIGI)	
		Changes to the **New Urban Lease Law**		Excepcional law to promote **urban rehabilitation**						
	Local		**Lisbon, Erasmus City** project launch **Creative Economy** project launch **Rehabilita primeiro, paga depois** programme (Rehabilitate first, pay later)							**Lisboa Green Capital**
Infrastructures		Creation of **StartUp Lisboa** (first startup incubator) First **tuk tuks** appear in Lisbon	Creation of Lisbon's **Pink Street** in Cais do Sodré	**Ribeira das Naus** renewal Opening of **TimeOut Market**	Opening of **Copenhagen Coffee Lab** and **Fábrica Coffee Roasters** (first specialty coffee shops in Lisbon) Opening of **Dois Corvos Tap Room** (first artisanal brewery)	Ampliation and renovation works in **Lisbon's Airport** Opening of **Palácio Chiado** Opening of **Bairro do Avilez**	New **Cruise ship** terminal Creation of **NomadX** (first Digital Nomads service company)	NOVA University opens new campus in **Carcavelos**		
Events			**Ryanair starts** operating in Lisbon	Belcanto restaurant is awarded **2 Michelin stars**		First **Web Summit** Conference	Second **Web Summit** Conference	Third **Web Summit** Conference	Fourth **Web Summit** Conference First **Lisbon Coffee Fest** (Lx Factory)	
Resistance		Creaiton of **Aqui Mora Gente** association		Creation of the **Habita** association		**Morar em Lisboa** movement	Creation of **STOP Despejos** collective	**Rock in Riot** protests for the right to the city	**Martim Moniz** protests	

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III. CASE STUDY: Ljubljana

Exploration of Ljubljana: contexts and trends of social exclusion, forms of coping and innovative solutions

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Introduction

As the initial stage of case study research within the SMARTDEST project, this report provides general insights into the current state-of-affairs of urban complexities present in Ljubljana. Initially, the socio-political context of Ljubljana will be presented and its specifics as a city and tourist destination. We further uncover the issues related to housing, gentrification and sustainability and technology readiness that have previously been identified in our research as the main entry points for further study.

The Slovenian capital of Ljubljana, with a population of around 300.000 is one of the smallest capitals in Europe. The city is located in Central Slovenia and it is the strongest area in terms of economic development, and is the administrative, economic, cultural and scientific centre of the country. One of Ljabljana's particularities is that he city has elected the same mayor, an acclaimed businessman, four times in a row, thus accomplishing the goals, like the adoption of the first ratified Municipal Urban Development Plan since the mid-1980s.

In recent years, Ljubljana has mainly attracted business (MICE) and cultural tourism, but current trends clearly show a growing interest among individual visitors. This has been achieved by promoting Ljubljana as an innovative, vibrant, colourful and sustainable destination. Total tourist demand in Ljubljana has increased significantly in the 2014-2018 period with an average annual growth in overnight stays by 17 %, and growth in arrivals by 13 %. The Coronavirus has severely affected Ljubljana and interrupted the multi-annual tourism growth trend in 2020.

Overall, the inhabitants of Ljubljana have a very positive attitude towards tourism, as tourism helped rejuvenate the rather empty city centre following the 90s transition and the beginning of gentrification processes and the 2009 global financial crisis which forced many city centre shops out of the market. However, they do not feel involved in the development and planning processes and estimate that they have no special benefits from tourism. The inhabitants of the city centre, unlike other residents, perceive some fewer positive effects of tourism and the voices over excessive touristification of the centre started to become louder in the last few years. In the period 2013-2017, the total tourist demand in the city was mainly covered by hoteliers and similar accommodation (78%), though, in 2019 the number of beds, provided by Airbnb exceeded the number of beds provided by hotels.

Slovenia is also among EU countries with the highest housing deprivation rates. In 2018, more than a fifth of its population lived in poor housing conditions. One of the reasons for the high housing deprivation rate is the relatively old and poorly maintained housing stock. The state also abolished systemic sources of funding, did not develop new supply institutions and hindered the construction of public housing stock. National policies are also reflected in municipal policy, which has neglected the housing topic for the last 25 years since Slovenia's independence. This played a major role in the housing policy, when the socialist real estate market was privatised and inhabitants had the right to purchase the apartments in which they were living for a price way below the market value. Due to this policy, 80% of Slovenians live in their own properties today and only 8% in rental flats. Consequently, the share of public housing in Ljubljana owned by the municipality fell from 42% (42,000 dwellings) in 1992 to 3% (4200) as of 2019. With the stagnation of the housing policy, Ljubljana has reached a point where few people can afford to buy an apartment while renting one equally puts a comparatively high burden on one's disposable income.

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The final chapter analyses Ljubljana's positioning as a sustainable and smart capital, both titles aligned with the goals pursued by the SMARTDEST project. Both at national and international level, the city of Ljubljana has been depicted as a successful champion, especially in the field of environmental sustainability, and has received several high-profile awards and implements a lot of sustainable and digital projects (see Timeline in Appendix 1). Looking at the city's up-to-date strategic documents from the period 2014-2020, none of them mentions the strategy of Smart Tourism Development in Ljubljana or further intensive and systematized socially responsible tourism steps. In addition to this observation, we could also not find any signs of smart/high-tech supported infrastructure or solutions in general, except of a well-developed and successful bike rental network and other transport solutions with corresponding separate apps, which can easily be considered sustainable solutions, but fail to qualify as smart.

We conclude this preliminary report with the chapter dedicated to trends during COVID-19 and perspectives on the "recovery period", as well as some methodological information on how we plan to carry out future research within the SMARTDEST projects.

1 The contextual dimensions and the main trends

Slovenia's capital, Ljubljana, is located in Central Slovenia, one of twelve statistical regions. It is the strongest area in terms of economic development, and is the administrative, economic, cultural and scientific centre of the country. A third of all Slovenian companies are based in this region. Many residents from other areas commute to work in this region. Most people in Central Slovenia are employed in public administration and defence, social services, education, healthcare, trade, hospitality and transport. Central Slovenia stands out in comparison with other regions because of the low percentage of people employed in industry and the high percentage employed in professional, scientific, technical and other business activities. The region also has the highest salaries in the country.

1.1 Political situation

The political situation in Ljubljana can best be described as one of the strongest continuities among European capitals, with the same mayor being in office for the past 14 years (see Timeline in Appendix 1). However, this was not always the case. Following the independence from Yugoslavia, Ljubljana tended to be governed by mostly left-wing mayors continuing the tradition established right after WW2 that no mayor ever managed to secure his second mandate. In the early 2000s the city was governed by two female mayors, representing the two main left-wing national parties, the LDS (Viktorija Potočnik) and SD (Danica Simšič), both however failed to bring the necessary development in terms of urbanism and tourism appeal to Ljubljana. This ended in 2006, when Zoran Janković, an acclaimed businessman in Slovenia decided to run for mayor, following his dispute with the national government and a forced resignation from the role of director of Mercator, Slovenia's leading supermarket chain. He prepared an ambitious program with the support of many influential Ljubljana inhabitants as an independent candidate with his own list - Lista Zorana Jankovića at the municipal election. He conquered the mayor's office where he, with a few months' excursion into national politics (where he managed to win the election but failed to form a coalition) has kept on governing till the present day (MOL, 2020).

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Since 2006, Janković held the majority in the city council for most of the time without even the need to form a coalition (in rare occasions it was necessary to cooperate with the traditional left-wing parties). Thus, he could efficiently push his agenda further. Certainly the bland right-wing and historic left and progressive orientation of the city helped him run the city in a rather „managerial" manner. Especially this lack of powerful opposition allowed him to govern the city rather as an enterprise than as a political structure. Throughout his mandate, he has been facing claims of corruption scandals. This is alleged by his detractors and acknowledged by his sympathisers. The latter said that while every politician is corrupt, at least Janković is "a man of action" and has finally done something for the residents of Ljubljana (Dnevnik, 2012). His opponents pointed out that his family and friends including their companies have benefited from publicly funded infrastructure projects initiated under Janković's guidance and that he led the municipality into a levels of indebtedness never seen before (Dnevnik, 2012).

As can be seen from the Timline in Appenix 1, one of Janković's biggest normative achievements is the 2010's acceptance of the first ratified Municipal Urban Development Plan (OPN MOL) since the mid 1980s. Within this document, rooted early 2002's Municipal strategies of Sustainable Urban Development and Urban Planning, Janković formalised 22 key strategic infrastructure projects, which were part of the election campaign prior to his election in 2006 (Kavčič, 2015). So far, depending on the source, some 12-16 of these projects have been successfully completed. Among these the Stadium and Multipurpose Event Hall Stožice, opened in 2010 are considered his flagship projects, as Ljubljana needed such structures in order to be able to host relevant sports and cultural events. On the other side, his main infrastructural project, Ljubljana modern passenger terminal aiming to connect the outdated central bus and railway stations has been hit by problems related to the aftermath of the Global Financial Crisis and the following economic stagnation present until today.

Concerning tourism, there is the notion that significant progress has been made in Ljubljana under Janković. He started the projects of urban rejuvenation and transformation of the historic centre into a car free zone in 2007 and a decade later most of the centre was pedestrian zone (see Timeline in Appendix 1). Even though residents reacted with scepticism and disappointment in the beginning, these urbanistic interventions paved the way for Ljubljana to climb the competitive rankings of European capitals that culminated with the city's proclamation as the European Green Capital in 2016 followed by numerous smart city awards. In terms of the city's tourism management, Janković reformed the previously functioning LTO into Turizem Ljubljana DMMO in 2009 (UL 2009), a public institute governing the development and promotion of the city as well as coordinating the tourism promotion of the broader region. While tourism governance in Slovenia is organised on the national level, the 2017 national tourism strategy STRST and the 2018's Law on tourism development support (ZSRT), gave the municipalities more autonomy in terms of tourist taxation. Ljubljana currently charges an overnight tourism tax of 2.5 EUR, which is among the highest in the country. At the moment, the municipality is in the final process of confirming the new tourism development strategy, as the current one SRTTDL 2016-2020 is expiring with the end of this year. Preliminary evaluations show that Ljubljana overachieved the set quantitative indicators with number of generated overnight stays yet failed to meet many of the set qualitative ones (Horwath HTL, 2020).

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1.2 Tourism situation

The year 1991 represents an important milestone for Slovenian tourism, as the country became independent from the former Yugoslavia and thus appeared as a new "spot" on the European and world tourism map. However, due to the 10-day independence war, the country had lost its appeal and the decline in international arrivals was so significant that it took almost two decades for the country to return to its former tourism volume. Later, the country also experienced the side effects of two major crises; In 1999, due to NATO military attack on Serbia and in 2009, during the global economic crisis. In the last decade of the 20th century, there were about 1.5 million arrivals and 5 million overnight stays, compared to 2019 – the sixth consecutive record year for Slovenian tourism, which accounted for more than 6 million tourist arrivals and slightly less than 16 million tourist overnight stays. Taking a closer look at the Slovenian capital Ljubljana, another important milestone has to be mentioned, the state's entry into European Union in 2004 (see Timeline in Appendix 1). Both Slovenia and its capital Ljubljana (one of the smallest central capital states) became a newly discovered place with many tourist opportunities on the horizon. That year resulted in a 17% increase in tourism arrivals, compared to the previous year (STO, n.d.).

Ljubljana and tourism

The Slovenian capital of Ljubljana, with a population of around 300.000, represents the intersection between the west and east of Europe. There are well-known and well-visited places in the immediate vicinity; 300 km from Vienna, 270 km from Venice and 300 km from Salzburg. The capital is famous for its old city centre, which is known for its unique architecture and image, combining the legacy of the Roman Emona, baroque and secessionist creations and the original seal of a local and well-known architect in Europe Jože Plečnik. According to locals and visitors, the old city centre is the most attractive part of Ljubljana (Stušek, 2006).

Key numbers

Total tourist demand in Ljubljana has increased significantly in the period 2014 – 2018 with an average annual growth in overnight stays by 17%, and growth in arrivals by 13% (*see Figure 14 below*). This significant growth can be attributed to an improved destination management and numerous awards for sustainability and promotion of the country, especially as a five-star boutique destination. In 2014, the total number of overnight stays reached 0.62 million, and the number of arrivals was 1.7 million. By 2018, the numbers had risen to 1.02 million arrivals and 2.2 million overnight stays, which represents an 85% increase in overnight stays over a four-year period. Although the destination is known for short-term visits, the average length of stay rose from 1.2 to 2.1 days in 2018 (Horwath HTL, 2020). The Coronavirus has severely affected Ljubljana and interrupted a multi-year tourism growth trend in 2020. Tourism experts forecast a decrease in the number of tourist and their tourism consumption in Slovenia by 15% to 30% in 2020 (Šušteršič, 2020).

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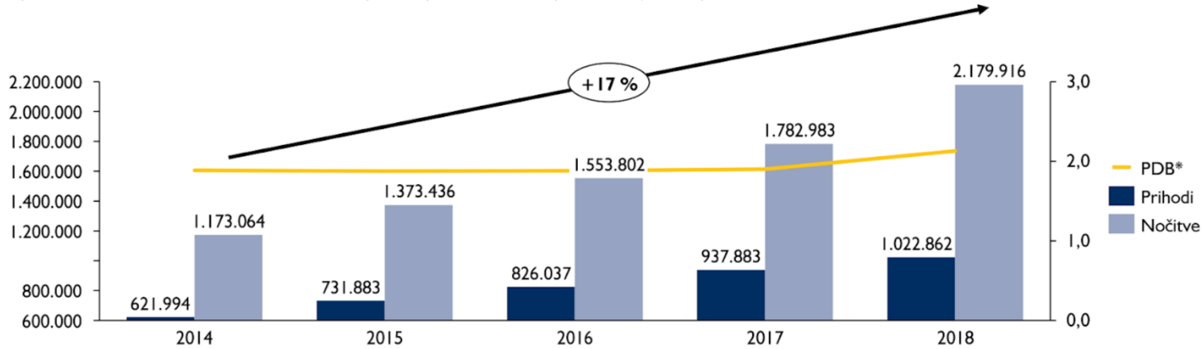
Figure 14: The number of tourist overnight stays increased by 86% in just 4 years



Source: (Horwath HTL, 2020)

In the period 2014 – 2018, foreign tourists accounted for a steady 95% of all overnight stays in Ljubljana. The key foreign markets are Italy, Germany, US, Great Britain and Asian countries. Since tourist demand in Ljubljana is strongly influenced by foreign visitors, the recent bankruptcy of the national airline company Adria threatens tourism in Ljubljana (Horwath HTL, 2020).

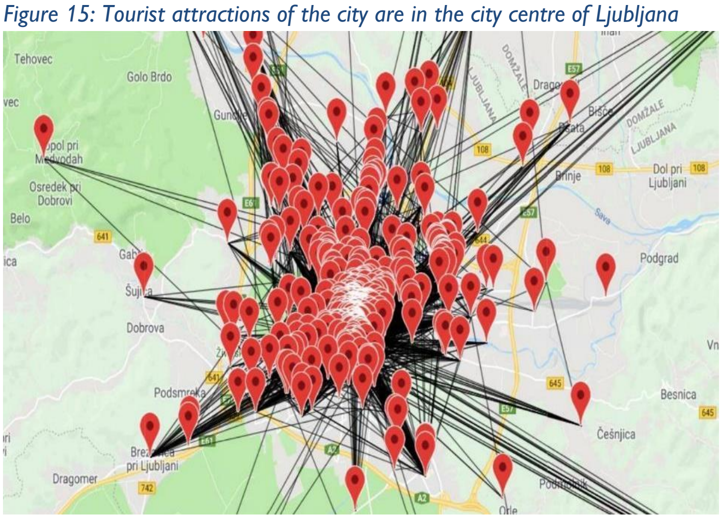
Tourism management

Tourism in Ljubljana is managed by the Ljubljana Tourism, which has been acting as a local tourism organisation and strategic tourism manager since 2001. The new strategy for sustainable development and marketing of the tourist destination Ljubljana and Ljubljana region for the period 2021 – 2027 is currently being developed and is about to be published (*Turizem v Ljubljani*, n.d.).

Motivation of tourists and their spending

In recent years, Ljubljana has mainly attracted business (MICE) and cultural visitors (museums, galleries, architecture), but current trends clearly show a growing interest in the leisure sector. This has been achieved by promoting Ljubljana as an innovative, vibrant, colourful and sustainable destination. Either individuals visit Ljubljana for a short break or groups travelling to several destinations (Ljubljana, Plitvice, Zadar, Dubrovnik, Vienna, Venice, etc.). In all these offerings, gastronomy plays the most important supporting role (Stušek, 2006). The Valicon˙s survey conducted in 2016 found that the average tourist in Ljubljana spends 51eur per day on all expenses (excluding sleep and transport) (Valicon, 2016).

Figure 15: Tourist attractions of the city are in the city centre of Ljubljana



Source: (Horwath HTL, 2020)

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Events

In 2018, more than 11.000 events took place in the capital, most of which targeted the local population. Despite the big number of events, there were fewer internationally recognised ones that were able to generate more overnight stays. The ones that did so are the Ljubljana Marathon and Franja Marathon (Horwath HTL, 2020).

Hotels and other accommodations

In the period 2013 – 2017, the total tourist demand in the city was mainly covered by hoteliers and similar accommodation (78%), but their share of overnight stays declined by 6 % in 2017. The total market share of private and other accommodation establishments increased proportionally by 6 %. Although the market share of hotels and similar establishments declined, the hotel category still predominates in terms of the number of nights spent. A constantly growing number of private and other accommodation establishments could pose a potential threat to the hotel segment. Over the period observed, the average price of hotels per day rose from 71 euro to 92.7 euro, which represents 5% per annum. In 2019 the number of beds, provided by Airbnb exceeded the number of beds provided by hotels (Horwath HTL, 2020).

Tourism pressure

Tourism flows in Ljubljana are strongly concentrated in a very limited area of the city centre and largely overlap with the pedestrian zone.

Although tourist demand in Ljubljana is mainly concentrated in the summer months, tourist demand is evenly distributed throughout the year. In the period 2014 – 2018, the concentration of tourists in the summer months has actually decreased about 0,6 %.

Overall, the inhabitants of Ljubljana have a very positive attitude towards tourism. They believe that tourism contributes well to the development of the city of Ljubljana and the local economy and that Ljubljana benefits from tourists. However, they do not feel involved in the development and planning processes and estimate that they have no special benefits from tourism. The inhabitants of the city centre, unlike other residents, perceive some fewer positive effects of tourism. The only statement on which the inhabitants of Ljubljana have a quorum is that tourism makes life more expensive (Horwath HTL, 2020).

1.3 Social situation

Demographic and migration trends

In the middle of 2018 around 289,830 people (about 140,120 men and 149,710 women) were living in the municipality, which ranks Ljubljana 1st among Slovene municipalities. The population density was 1,054 people per square kilometre, which was higher than the national average of 102 people per square kilometre. The number of people who moved out of the municipality was lower than the number of people who moved into the municipality. The net migration per 1,000 inhabitants showed a positive development with plus 10.9. The sum of natural increase and net migration per 1,000 inhabitants in the municipality was positive with a value of 12.0, significantly higher compared to the total of Slovenia 6.8 (SORS, 2020d).

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Table 11: Demographic data of Ljubljana compared with the average on the national level, year 2018

DATA	LJUBLJANA	SLOVENIA
Surface area (sq. km) - 1 January	275	20,273
Population - Total - 1 July	289,832	2,070,050
Population - Men - 1 July	140,124	1,030,234
Population - Women - 1 July	149,708	1,039,816
Population density - 1 July	1054	102
Natural increase	302	-900
Total increase	3,471	14,028
Live births per 1,000 population	9.4	9.5
Deaths per 1,000 population	8.4	9.9
Natural increase per 1,000 population	1	-0.4
Total net migration per 1,000 population	10.9	7.2
Total increase per 1,000 population	12	6.8
Mean age (years) - 1 July	42.6	43.3
Tertiary graduates (per 1,000 population)	8	8
Employment rate (%)	64.5	64.5
Average monthly gross earnings per person (EUR)	1,936.16	1,681.55
Average useful floor space (m^2) of dwellings	68.7	81.5

Source: SURS, 2020, https://www.stat.si/obcine/en/Municip/GroupedAll/82

From 1948 to 1993, the population in the area of today's Ljubljana increased from 123,149 to 275,366 or 123%. Under the influence of industrialization, we witnessed a very accelerated urbanization in Slovenia in the 1960s and 1970s. The growth rate increased until 1981, then slowed and by the end of 1999 even came to stagnation. The process of suburbanization and the population shift from central urban into the suburban settlements started already in the late 1970s (Rebernik, 1999).

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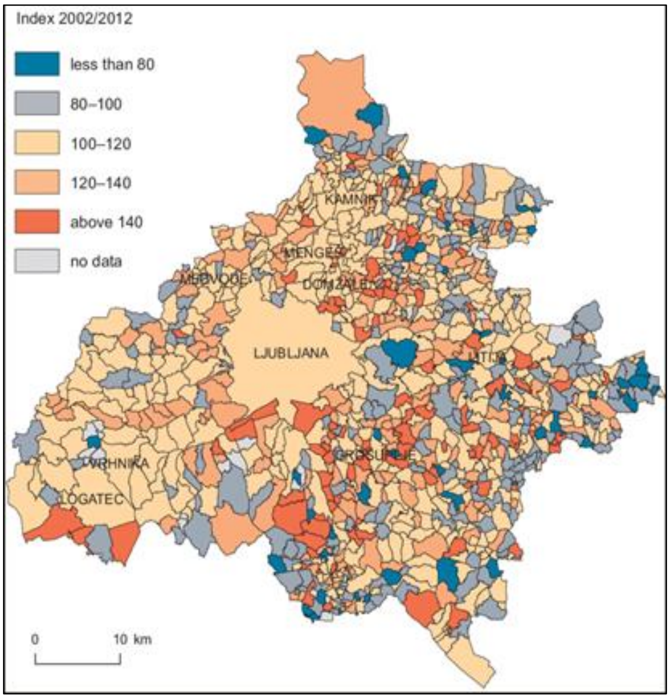
Figure 16: Index of population development in the wider region of Ljubljana between 2002 and 2012 by settlements



Source: (Rebernik, 2014)

Demographic change and the aging of the population and the consequent long-term labour shortage are some of the issues Slovenia will face in the future. According to the National statistical office the population of Slovenia is projected to increase until around 2024 (to about 2,116,000), and then slowly decrease. On 1 January 2100 Slovenia's population is expected to be 1,888,000 or 10% less than in the projections' base year 2019. In the coming decades, the age structure of Slovenia's population is expected to change significantly. In 2019, the elderly (aged 65 or more) stood for 19.8% of the population, while in 2100 this share is projected to be at just over 31% (SORS, 2020a).

Being the capital has caused intensive immigration from the rural areas and from other republics of the former Yugoslavia. The non-Slovenian ethnicity was represented to the extent that it is shown in the table below.

Table 12: Municipality of Ljubljana– the comparison of censuses of 1991 and 2002, ethnic structure (percentage)

Ethnicity	***Slovenians***	***Serbs***	***Bosniaks***	***Croats***	***Albanians***	***Macedonians***	***Montenegrins***	***Roma***	***Other***
Year									
1991	*84,01*	*6,76*	*3,13*	*4,28*	*0,30*	*0,47*	*0,46*	*0,12*	*0,47*
2002	*84,46*	*5,70*	*4,88*	*3,11*	*0,47*	*0,39*	*0,36*	*0,08*	*0,56*

Source: SORS, 1991, 2002 in Josipovič (2019)

As a result, certain areas and quarters of Ljubljana, predominantly the residential areas, were uniquely shaped (Pak, 1992). Larger spatial concentrations of the immigrant population can be found in workers' suburbs east of the city centre and in most of the southern outskirts of the city, where prices or rents are more accessible due to their remote location and lower quality class of housing. Despite the noticeable spatial socio-economic differentiation of the immigrant population so far, we cannot talk about pronounced spatial segregation, with the exception of

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the one area, which is characterized in some places by communal and infrastructural disorder (illegal construction, disorderly sewerage system, poor connection with public passenger transport) (Komac & Medvešek, 2005).

According to Josipovič (2019), when comparing the date of ethnic, migration and educational structure from the censuses of 1991, 2002, and 2015 we find that:

- After the global financial crisis in 2008 the immigration greatly increased to the city from other municipalities and regions of Slovenia as well as from abroad.
- Migrations to Ljubljana are balanced by gender.
- A more detailed spatial analysis of the processes of changes in the representation of the population by ethnicity at the level of demographically homogeneous parts shows spatial differences in the concentration of the three largest ethnic groups, while Croats are more concentrated in the northern outskirts of, Bosniaks are more present in the southern parts and Serbs in urban areas near the centre and in the east of the city.
- Differences in the level of education achieved between individual groups of the population increase according to the status of immigration and migration experience in the family. Until Slovenia became an independent country in 1991, residents of Ljubljana with an ancestor from other republics of Yugoslavia or other countries had or achieved a higher level of education than the native population. This trend changed five years later.

The war in the territories of former Yugoslavia triggered the first major migration flows of people coming from disputed areas (especially Bosnia and Herzegovina, Macedonia, Serbia and Kosovo). Those migration flows are still present today and evident in the highest number of foreign immigrants in Slovenia. Due to Slovenia's geographic position in a migration sensitive area at the intersection of the Balkan and central Europe, it became increasingly under pressure at the end of 1990s. The country was attractive as a location of transition as well as final destination for people fleeing war and distress. The legislation at that time faced many challenges including handling Slovenia´s democratisation process that started with its formal independence. (EMN, 2020)

Concerning the labour migrations, at the end of 2019 more than half of all people in employment commuted to work to another municipality. The most intense situation regarding labour migration is in Ljubljana, where slightly more than 129,200 people from other municipalities commute to work on a daily basis. At the same time, around 23,300 people living in Ljubljana commute to work in other municipalities. The total flows of labour migrations of Ljubljana include around 152,500 people, three times less than the second largest city in Slovenia Maribor (SORS, 2020e).

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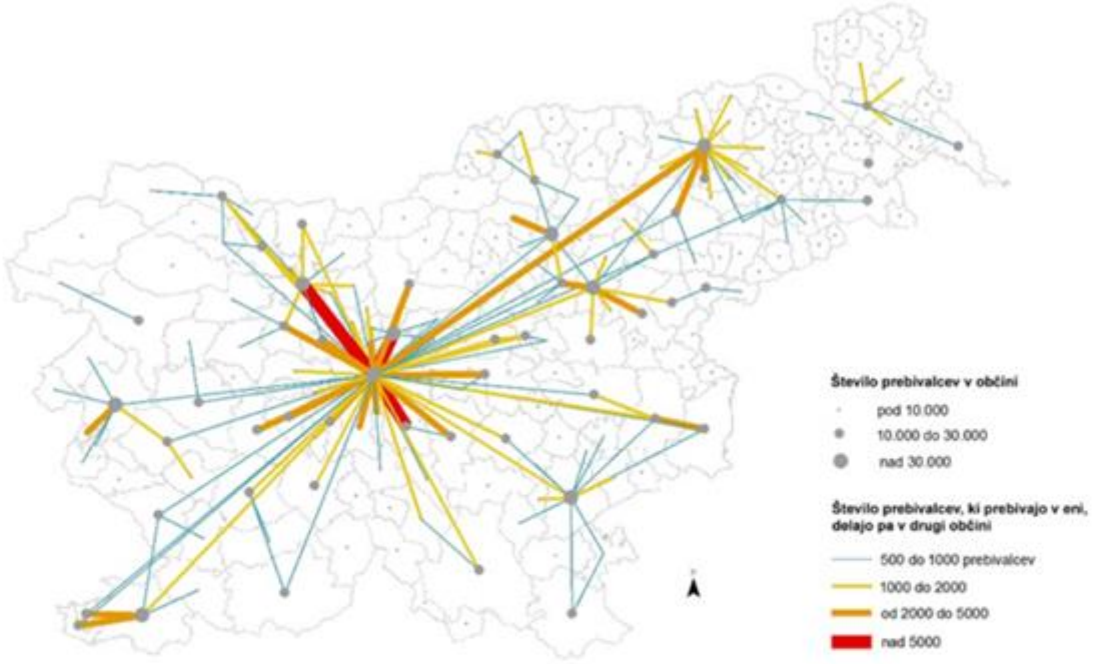
Figure 17: Flow of the labour migrations in Slovenia, year 2010



Source: (GIS, 2020) https://gis.si/dev/sssp-frontend-v2/prikaz_metaopis.php?kazalnik=57

Workforce and the labour market

In general, the decline of the working age population will become a limiting factor for economic growth over the next ten years. While maintaining modest immigration, more employment of young people and the elderly will not be enough to cover the need for more labour force necessary to satisfy the growing economic activities. Moreover, demographic trends will reduce funding sources and increase social protection expenditure. Additionally, the aging of the population is transforming the needs of housing, spatial and regional policy (Čelebič, et al., 2016).

In Ljubljana, the average monthly gross earning per employee was about 15% higher (13% after taxes) than the average of monthly earnings for Slovenia. 65% of city residence aged 15–64 (i.e. working age population) were in employment (i.e. persons in paid employment or self-employed persons), which is the same as the national average (SORS, 2020d).

The economic crisis caused by the Covid-19 pandemic will lead to significant changes in the Slovenian labour market. The positive trends of past years, when employment achieved high levels of growth and unemployment fell as a result of increased demand for labour, have come to a halt and begun to reverse. Many employers in the most affected areas of business, such as catering and hospitality, tourism, transport, trade, entertainment, culture, personal services and partly also manufacturing, have found themselves facing an uncertain future. As a result, they are laying off workers rather than hiring new ones. The labour market structure changed considerably as more and more people were dismissed and forced to apply for unemployment benefits. A comparison between the unemployment figures from April 2020 and April 2019 shows that the category of permanently redundant workers and those who had lost their jobs as a result of bankruptcies accounted for 22.4 %, the highest unemployment figure over the course of 12 months. An increase in unemployment was also seen among those aged between 15 and 29 (to 20.6 %), between 30 and 39 (to 23 %) and between 40 and 49 (to 20.6 %). Looking at unemployment by educational attainment, we see a rise for people with vocational secondary

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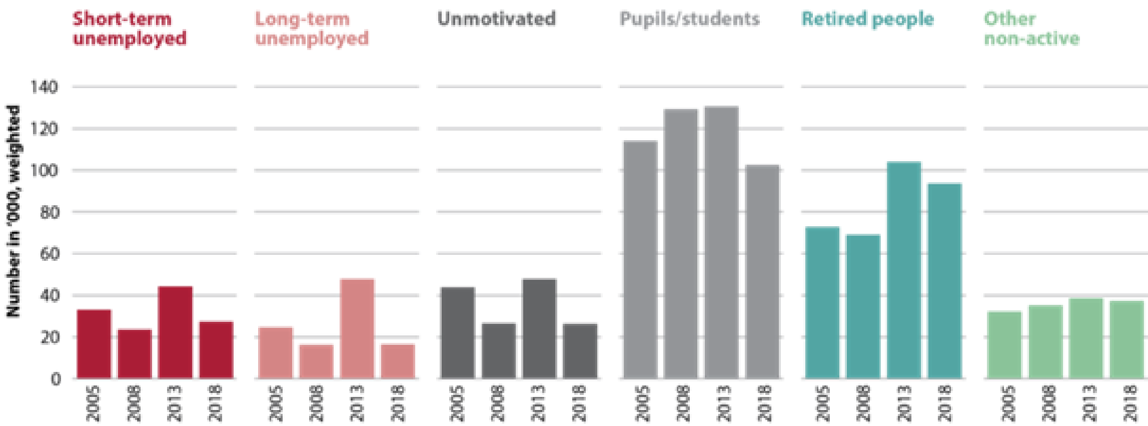
education (to 26.3 %) and those with secondary technical and general education (to 26.4 %). By age, the proportion of those aged 50 or above fell (to 35.8 %), while by level of education, there was a decrease in the share of unemployed with primary education (to 31.2 %) and those with tertiary education (to 16.1 %) (EURES, 2020). Looking at the gender differences of the unemployment rate in the 3rd quarter of 2020, we see it was 4.4 % among men and 5.9 % among women (SORS, 2020c).

Amid the restrictions due to COVID-19 pandemic, particularly on business operations in service activities since mid-October 2020, in the middle of December 2020 the number of registered unemployed persons remained at almost the same level as in the period from July to September 2020. Following the strong growth in the first wave of the epidemic, the number of registered unemployed persons has been gradually falling since mid-year after the adoption of intervention job retention measures and the lifting of restrictions. On 10 December 2020, there were around 12% more unemployed people than in the same period last year (IMAD, 2020c).

Demographic changes are reducing the share of the population in the age group 20–64, which poses a challenge for ensuring a sufficient supply of labour. Amid a strong demand for labour, more and more enterprises have problems finding appropriately qualified workers, which could limit further economic growth. It is therefore necessary to activate spare capacities on the domestic labour market and formulate effective migration and integration policies to ensure sufficient net immigration. Elderly (aged 55-64) face a difficult situation in the labour market and are forced in early retirement, which again fuels labour shortages and puts pressure on social assistance schemes. The employment rate of this group is significantly lower than the EU average (IMAD, 2020b).

Figure 18: Assessment of the number of people who could be included in the labour market in Slovenia from 2005 to 2018



Source: (IMAD, 2020b)

In general, staff shortage in Slovenian tourism and the hospitality industry is of a permanent nature, at least until the COVID-19 pandemic. Due to the lack of local workers in Slovenia, the tourist industry employs many foreigners.

According to the Travel & Tourism Competitiveness Index 2019 developed by World Economic Forum, Slovenia takes 40th place, out of 140 countries, in the Human resources and labour market pillar, measuring the availability of qualified staff and how efficiently human resources are allocated (TTCI, 2019).

Characteristics and trends in welfare and social exclusion

On the national level, in 2019 the at-risk-of-poverty rate (12.0%) was 1.3 pp lower than in 2018 and the social exclusion rate (14.4%) was 1.8 pp lower than in 2018.This means that in 2019 about 243,000 people in Slovenia were living below the at-risk-of-poverty threshold, which is 25,000 less than in the previous year. Of those 243,000 people below the threshold, 90,000 were retired (18.2% of all retired persons), 60,000 of them were women and 30,000 men, 40,000 were persons in employment (4.5% of all people in employment), 40,000 were unemployed (43.6% of all unemployed), 41,000 were underage children (10.5% of all children) and 32,000 were other persons (18.9% of all people unable to work, homemakers, students, other inactive and unclassified persons) (SORS, 2020b).

Figure 19: At-risk-of-poverty or social exclusion rate, statistical regions, Slovenia, year 2019

Source: (SORS, 2020b.)

The annual at-risk-of-poverty threshold for a one-member household was set at EUR 8,440; the net disposable monthly income of people below the at-risk-of-poverty threshold was thus below EUR 703 per equalised adult person. The threshold for a four-member family with two adults and two children younger than 14 was set at EUR 1,477 per month and the threshold for a two-member household without children at EUR 1,055 per month. Social transfers including pensions still have an important impact on decreasing the at-risk-of-poverty rate. If social transfers - family and social benefits - were not considered as income, the at-risk-of-poverty rate would amount to 22.0%. If also pensions were subtracted from income, the at-risk-of-poverty rate would increase to as much as 39.2% (SORS, 2020b).

In 2018, the risk of social exclusion rate was the lowest thus far and among the lowest in the EU. In 2014–2018, the social exclusion rate declined reaching 16.2% at the end of the period, which is less than before the economic and financial crisis (IMAD, 2020a).

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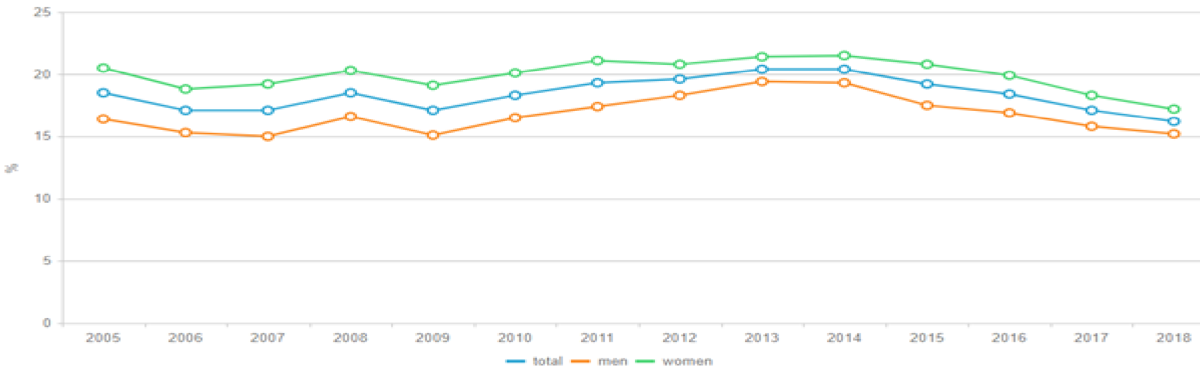
Figure 20: At-the-risk-of poverty or social exclusion rate by gender, Slovenia, 2005-2018



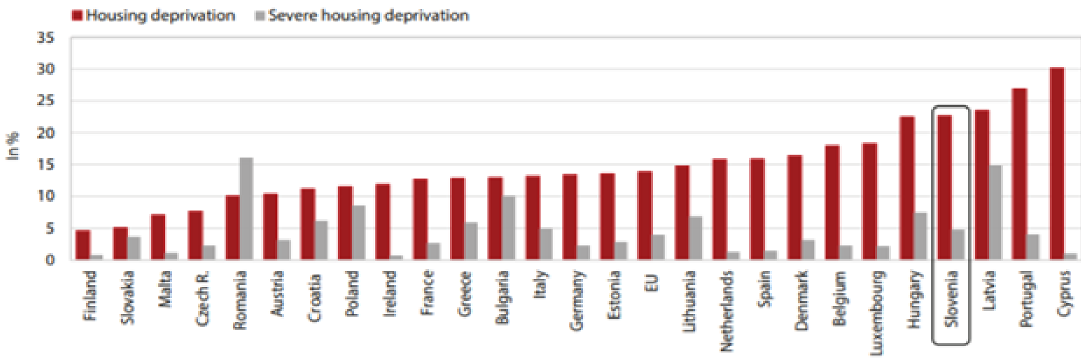
Source: (SURS, 20209) https://www.stat.si/Pages/en/goals/goal-1.-end-poverty-in-all-its-forms-everywhere/1.1-people-at-risk-of-poverty-or-social-exclusion

Housing

Slovenia is among EU countries with the highest housing deprivation rates. In 2018, more than a fifth of its population lived in poor housing conditions. Since 2011, however, this share has declined more than the EU average. Yet, regional disparities increased during this period. The high regional disparities in housing deprivation are largely attributable to the more intense construction of flats in some municipalities in the Osrednjeslovenska (Ljubljana) and Podravska regions (Maribor) (IMAD, 2020a).

One of the reasons for the high housing deprivation rate is the relatively old and poorly maintained housing stock. More than 80% of dwellings were built before 1990, the most (almost 15,000 per year) between 1971 and 1980. Their renovation represents a great potential for improving the quality of housing, reducing environmental impacts and lowering household energy costs. However, renovations are hampered by a relatively high share of households with low income living in those dwellings. In 2018, more than 30% of households below the poverty threshold lived in dwellings exhibiting at least one of the housing deprivation measures. The housing cost overburden rate is also the highest among persons with the lowest income. Almost a quarter of people overburdened with housing costs live in households with income below the poverty risk threshold, which is nevertheless significantly less than on average in the EU (38.5%). With the construction of new dwellings, the quality of the housing stock is improving only slowly. In Slovenia, 4.8% of the population faced severe housing deprivation in 2018. In measuring the severe housing deprivation rate, the overcrowding rate is taken into account in addition to at least one of the deprivation elements (IMAD, 2020a).

Figure 21: Housing deprivation rate and severe housing deprivations rate, year 2018



Source: (IMAD, 2020a.)

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2 Housing: exclusion of students and young families from the real estate market

2.1 Chronology of the issue

Housing issues have been very consistently present over the last 20 years in Ljubljana. The current situation is the result of both historical and present development priorities of the municipality and state, or rather stated lack thereof. There is no serious and consistent housing policy in Ljubljana even though the concept is not foreign to the city, as much of the housing stock was built with public support during the period of socialist Yugoslavia. Slovenia’s independence played a major role in the housing policy. The newly developing democracy left this policy field completely to the market without any serious attempt at regulating or intervening. On top of that, the real socialist real estate market was privatised in the early 90s. Inhabitants had the right to purchase the apartments in which they were living for a price way below the market value. Through this policy, 80% of Slovenians live in their own properties today and 8% in rental flats (SORS, 2018). Consequently, the share of public housing in Ljubljana owned by the municipality fell from 42% (42,000 dwellings) in 1992 to 3% (4200) as of 2019. At the same time, the state abolished systemic sources of funding, did not develop new supply institutions and hindered the construction of public housing stock. National policies were also reflected in municipal policy, which has neglected the housing topic for the last 25 years. Thus, the housing issue has lost its basic developmental and social status. It turned into a private problem for all inhabitants of Ljubljana (IŠSP & FDV 2019).

With the stagnation of housing policy, we have reached a point where few people can afford to buy an apartment while renting one equally puts a comparatively high burden on one’s disposable income. According to the housing cooperative Zadrugator (2019) all cannot be left to the market and capital. In fact, the state should be the one to create market conditions. Zadrugator (2019) claims that everyone with an average salary should be able to afford an apartment. Yet, the present situation is far away from that. The rental market is in a catastrophic state with prices rising at a seemingly uncontrolled pace. The recent study (IŠSP & FDV 2019) dealing with the real estate market in Ljubljana came to the following conclusions:

- Ljubljana´s housing stock is rather old, as only 16% is built after 1991
- The average resident of Ljubljana has fewer square meters living space than the average in Slovenia and much less than in other European cities
- Ljubljana has significantly fewer apartments per capita than other

European cities as well as fewer dwellings than the number of households

Looking at the purchasing power of residence in Ljubljana, the current average net salary is around 1,200 EUR (SORS 2020), and the average rent for a two-bedroom apartment in Ljubljana is between 700 and 800 EUR, 900 EUR or more if we include additional living costs such as heating, water and electricity. This means that someone with an average salary can hardly afford to stay in Ljubljana, not to mention students who have no possibility of renting studios on their own. As can be seen from the *Figure 22* below, the prices for a m^2 of real estate were rising throughout the 2000s and reached their first peak in 2008 (*see Timeline in Appendix 1*). The

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recession hit Slovenia rather hard and the real estate market stagnated and slightly declined over the following 10 years. However, from 2017 onwards, favourable economic conditions and the growth of tourism and AirBnB in Ljubljana fuelled an almost skyrocketing growth of almost 30% between 2016 and 2018. Further, Cekin(2020) points out that between 2015 and 2018, housing prices rose by an average of 22 percent (about 500 euros), while average wages grew by less than 10 percent (about 90 euros). This substantially increases the share of housing burden on individual income.

Figure 22: Prices of m2 of property in Ljubljana

Source: (Slo-tech, 2019)

The *Table 13* below shows the real estate market of the city centre and the whole municipality. The centre, where most AirBnB flats are located, is significantly more expansive with on average 3000 EUR and more per m².

Table 13: Real estate prices in the last 5-year period

Price per m²	2015	2016	2017	2018	2019
Ljubljana municipality	2.030	2.170	2.410	2.770	2.800
Ljubljana town centre	2.380	2.430	2.700	3.120	3.140

Source: (PoselDanes, 2020)

To understand the complexity of Ljubljana´s housing market, the student population has to be taking into account. There was a shortage of beds in public dormitories two or three decades ago, and there are still not enough for all students today, as in the last 20 years there was virtually no new dorm construction projects in the city. While data is inconsistent, only some 15%-20% of students find accommodation in public dormitories (ŠOS 2019, Primorske Novice 2020). The government offers subsidies for students who need to rent their accommodation on the private market, however this is not really efficient as it currently only amounts to 32 EUR a month in

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contrast to 250 EUR plus costs of a room in a shared flat or 450 plus EUR of a studio. According to ŠOS (2020), the lack of affordable housing makes many students continue living with their parents and/or force them to commute to Ljubljana for studies on a daily basis.

2.2 Coping strategies and initiative

Ljubljana is the administrative, educational and economic center of Slovenia. It is marked by population growth and the highest growth in housing prices in the country and is characterised by the following facts:

- Housing construction has lagged far behind the population growth since 2008;
- Building activity is very limited and the majority of new houses are luxury real estates;
- The estimated deficit of 16,000 dwellings by 2025 will be met with the current pace of construction by 2090.

The coping strategies that are most discussed in the media primarily deal with state-level interventions and Ljubljana´s administration seems to be comfortably waiting for national interventions. They predominantly include the national Housing Law, which has been heavily discussed by three recent governments, but not yet ratified. It should, among other things, re-define social housing and allocate funds for it. Furthermore, for the past 15 there was a discussion concerning a necessary tax reform, which would tax the owners of multiple properties that are not permanent residence. Ultimately there are vivid calls in the tourism community to limit the max. days that an apartment can be rented on the platforms such as AirBnB over the span of the year.

2.3 Key stakeholders

- Student organisation of Slovenia
- Student organisation of Ljubljana University
- Urad za Mladino RS
- Youth Council of Slovenia
- Zadrugator Housing Cooperative
- Turizem Ljubljana

2.4 Summary and outlook

In their 2019 appeal in relation to housing problematics, the student and youth organisations demanded the following measures from the Government of the Republic of Slovenia which describes the current situation very accurately and includes the following steps needed in order to overcome the housing issues (ŠOS 2019):

- allocate significantly more national funds to solve housing problems, both for construction and other incentives;
- enable housing funds access to loans to stimulate novel investments;

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- (thereby) increase the stock of public housing (first where the need for it is greatest) - especially more non-profit rental housing for young people;
- build public student dormitories (first where the need for them is greatest), and allocate budget funds for their development;
- fill empty public and private dwellings, e.g. by taxing the empty and offer tax relief for those in a regulated lease; purchase of apartments, transfer of ownership, etc .;
- regulate and limit the letting of flats through online platforms such as AirBnB (and short-term renting should not be more tax-attractive than long-term renting, as it currently is) and letting flats on the black market;
- increase the security of tenancy and the reform of housing legislation;
- reintroduce soft loans for young families;
- to encourage housing cooperatives.

The impact of the new coronavirus pandemic also leaves a mark on the Ljubljana real estate market. Major shifts are already happening in the rental market. The lack of tourists hit homeowners particularly hard, who usually rented out to tourists via platforms such as Airbnb and Booking. As a result, many people started renting out apartments on a long-term basis, and some even decided to sell them. The offer of rental housing in Ljubljana is currently much higher than in previous years, and with a larger share of recently renovated properties. In addition, rents have fallen by an average of around 15 percent and more. Above all, it is possible to rent higher quality real estate for a lower price than before the pandemic, however this change is not yet reflected on the price level of flats offered for purchase. There, the bubble is expected to shrink dramatically in the coming months (PoselDanes 2020).

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3 Gentrification

3.1 Chronology of the issue

Gentrification is considered to be two-fold: The revitalization or redevelopment of the cities and the creation of space for the middle class on one hand, face peripheralization of the working class and the poor on the other. The intersection of both represents the space of class struggle (Pelko, 2013). Spaces that were originally intended for locals and their communities are now replaced by spaces of consuming. The term was first used in the seventies to describe the changing character of the western post-industrial cities. The obvious signs of the phenomenon are that larger cities have more restaurants and bars catering mainly to tourists, have more services for tourists rather than for the local population, the rise of upward tensions in local real-estate markets, provoking an increased spatial displacement of lower class residents, the expansion and commodification of youth oriented and tourist-oriented nightlife in central areas of the city, etc. (Sequera, J. & Nofre, J. 2018).

Gentrification as we know today was not a hot topic in Ljubljana during the period of socialism. The differences between marginal social classes were rare until the 1990s but come to the fore later (Pelko, 2013). The gentrification has been adopted with the advent of capitalism and increased over years. Residents who once had the access to relatively good apartments in the socialist state suddenly lost them, as they could no longer afford them (Novinarji, n.d.) A look back to the 1980s and 1990s (the period of deindustrialization) shows a clear trend of population decline in the Ljubljana city centre. After most of the public housing stock was privatised in the early nineties, the renting market became quite unregulated. Due to the suburbanisation process, the population began to migrate to the outskirts of the city, and jobs were no exception, as something similar happened to the industry. This trend has gradually encouraged the relocation of all other services from the city centre and the construction of a new shopping centre (BTC - 1990 on the site of the former Yugoslavia's freight terminal). The network of BTC shops was quickly joined by the construction of other commercial buildings, hotels, spaces for leisure activities, restaurants, etc. The right to socialise in the public places was quickly reduced to the right to consume. The city centre became filled with more expensive shops, bars and restaurants mainly for the tourists and their consumption (second phase of gentrification) (Pelko, 2013). Klemen Prostajnjer described such relocations of services further with the example of handy shops in the center. He explained that there has not been a store for basic home fixing in the city center for around 10 years, which means that such basic services for local residents are out of convenient reach (Novinarji, n.d.). Small retailers faced rapidly growing costs that were difficult to cover. The consequences were the disintegration of many local merchants and craftsmen, who migrated from the centre to cheaper areas with affordable rents. This trend coincides with the emergence of the first shopping centre mentioned above (Uršič, 2003). The process of deindustrialisation thus ended with the formation of large business centres and buildings on the outskirts of the city (business, financial, educational and other activities) (Pelko, 2013).

During this period, the city centre and its surroundings were characterized by urban renewal and the construction of new houses and blocks, mainly intended for wealthier residents in particular members of the new middle class (managers, stockbrokers, lawyers, politicians, etc.)

and tourists ("touristification"). The Tabor district and the city centre are very illustrative examples of such transformations. On the other hand, Ljubljana still has some abandoned districts from the industrial era that have been largely spared from gentrification for the time being. An example is Metelkova where migrants, artists and other members of the creative community live and carry out a bridging function which means they engage in various creative activities to justify and delay the undesirable penetration of investment capital (Novinarji, n.d.). Yet, such districts are endangered by capital and the middle class (IPoP, 2011; Pelko, 2013). A very similar example is Tovarna Rog, a former bicycle factory, which closed shortly after the end of Yugoslavia and has been then occupied (2006) by alternative groups who transformed it into a creative space full of cultural life (Novinarji, n.d.). However, the days of Tovarna Rog as a creative space seem to be numbered, as the whole area is on the list of municipal redevelopment projects aimed at extending the promenade and the main tourism flows along the list banks of river Ljubljanica (Horwath HTL, 2020). *Figure 23* below portrays a facade right next to Tovarna Rog and indicates that residents do start recognising gentrification as a problem.

Figure 23: Take a shit on Gentrification Stencils

Source: (Novinarji, n.d.)

Another factor seriously changing parts of Ljubljana is Airbnb. For most of its users, the platform represents with it a notion of easy going, interesting travel experience and cheaper accommodation options, however Airbnb does not benefit everyone involved. It may benefit hosts and guests who pay less, but it does not for the community and its residents, who are by far the largest group of stakeholders (Hinsliff, 2018). There is an increasing number of apartments in the centre of Ljubljana that owners prefer to rent short-term through Airbnb to tourists rather than long-term to residence (Mrevlje, 2018). In the period 2013-2020 the number of beds made available on the Airbnb platform increased from 336 in 2013 to 7,161 in 2018. This trend seriously threatens several aspects of the city: competitiveness of the accommodation structure, rising housing prices, population exodus, general dissatisfaction and more. Locals are now forced to pay housing prices being set by global rather than local demand. Most of the Airbnb accommodation stock is within Ljubljana´s ring road with a high concentration in the city centre, as can be seen in the *Figure 24* below. 3.6% of Airbnb hosts in Ljubljana rent more than one room on the platform. It is not a rather small number, but it is worrying that those hosts offer 36% of all rooms on the Airbnb platform (Horwath HTL, 2020).

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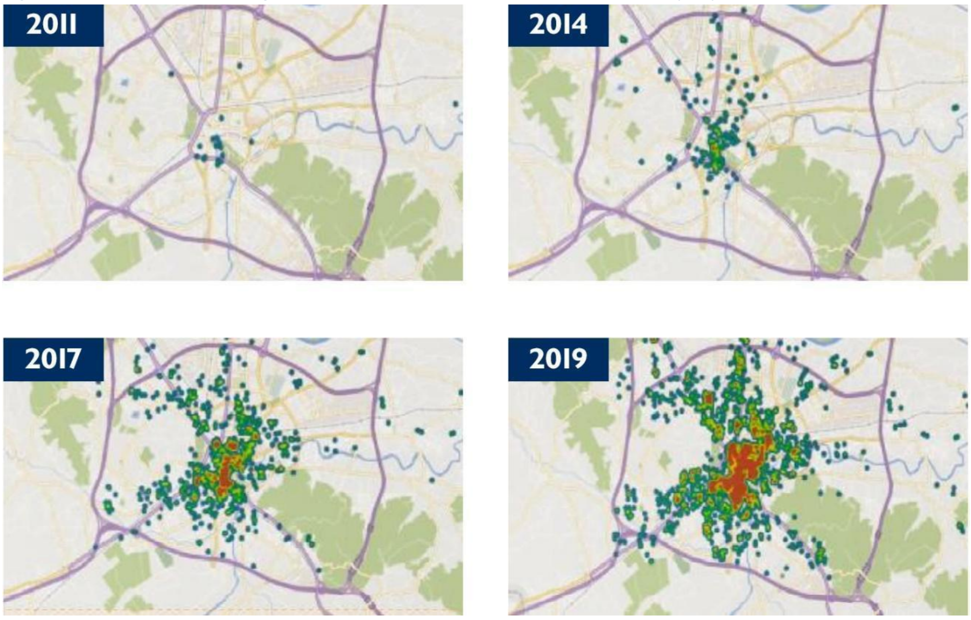
Figure 24: Animation of the growth of the number of Airbnb providers in Ljubljana in the period 2011 - 2019



Source:(Horwath HTL, 2020)

Due to Airbnb students coming to the capital of Ljubljana face big challenges in finding a room. A testimony of this could be found on the Facebook page for Erasmus students where students complained about a desperate search for an apartment or room and their high prices (Novinarji, n.d.).

3.2 Coping strategies and initiatives

In the past, residents, students and other community members from Ljubljana attempted in various ways to cope with different challenges reshaping their lives in the city. To list a few: The following initiatives expressed their opinions through attention-grabbing public protests and campaigns ("Lublana je bulana", "Kje bomo pa jutri spali?" organised by students), local initiatives (Tovarna Rog, who are working for the preservation of autonomous Rog factory, over capitalist and commercial interests), media news, graffiti, etc. Years ago, the Tabor district joined forces with other partners. Through several projects the identity of the former industrial area was partially restored. Within the ECLECTIS project, the same organization, together with partners from 6 countries, investigated whether NGOs can help to strengthen local communities and regulate the public space[1]. Politics has also taken some real estate related measures, such as government guarantees for loans taken by young people and young families, renting public houses etc.

[1] The report can be found here: http://www.dedale.info/_objets/medias/autres/eclectis-publication-966.pdf.

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3.3 Key stakeholders

- Tourism Ljubljana (DMMO)
- City district Tabor- Ljubljana
- City district Center - Ljubljana
- Autonomous factory Rog
- Student organization of the University of Ljubljana
- Metelkova town
- Public housing fund of the municipality of Ljubljana
- Svet sobodajalcev – Klarin svet
- Bunker

3.4 Summary and outlook

Local manifestations, initiatives and dissatisfactions discussed above have shown that urban planners, politicians and the general public are aware of the consequences of tourism and gentrification. The tourism-city centre- gentrification nexus for Ljubljana shows the particularity, that it was gentrification which stripped the centre of its contents first and tourism development helped reviving it in 2010s until this touristification process started to overpower it in the last few years. Although some measures have already been taken, we believe that the situation can be further improved in the future. Those assumptions are based on the fact that Slovenia sets a very high standard of sustainability, social responsibility and environmental friendliness for all countries and cities around the world, for which it has received many attention-grabbing awards in the past (see *Timeline in Appendix 1*)). The only concern and question is whether we will be able to keep up and cope with such a rapid growth trend of tourism in Slovenia and even more so in Ljubljana? COVID-19 has suddenly stopped this growth trend allowing rethink previous development. We believe that now might be the best time to talk calmly, innovate and prepare systematically for resuming tourism in a sustainable way. Moreover, the new strategy for the development of the tourist destination Ljubljana City and Ljubljana Region for the period 2021-2027 was officially confirmed right in the days of writing this report, which gives us further hope for greater progress and improvements on this area.

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4 Sustainability and technology readiness

4.1 Chronology of Issue

The chapter analyzes Ljubljana's readiness for the goals pursued by the SMARTDEST project from the perspective of all three pillars of sustainability and the implementation of smart technologies in them. As can be seen from the Timeline in Appendix 1, both at national and international level, the city has proven to be a successful champion, especially in the field of environmental sustainability, and has received several high-profile awards (Visit Ljubljana, 2020a):

- 2015 - the first destination in Slovenia to receive the Slovenia Green Destination Gold label as part of the Green Scheme from Slovenian Tourism
- 2015 - WTTC Tourism for Tomorrow award
- 2017 - WTM Responsible Tourism Award for the development of sustainable tourism
- 2019 - award for sustainable efforts in the competition European Smart Tourism Capital
- 2019 - for the fifth consecutive year awarded with the Slovenia Green Destination Gold badge, a Slovenian green travel destination certificate in the highest, golden category
- 2019, 2018, 2017, 2016 and 2014 - TOP 100 Sustainable Destinations. In 2019 in the "Best of Cities" category. In 2018 in the "Best Destination of Europe" category.
- 2019 - award for digitisation efforts in the competition European Capital of Smart Tourism.

In the following, the main actors and building blocks of the projects are presented, through which Ljubljana received the above awards and thus found its answer and coping mechanisms for the following trends in the field of sustainability and digitalization. The summary offers an overview of Ljubljana's capabilities and readiness for new development steps that SMARTDEST will identify and list in its managerial implications.

4.2 Coping Strategies and Initiatives

The most recognizable sustainable projects for which Ljubljana received the above awards are:

- Green Purchase Chain and Local Food Exchange
- Urban beekeeping projects
- new hiking trails in the region Central Slovenia, nudging guests to spend a few hours or days in the city's outskirts
- tactile markings for visually impaired
- modernization of more sustainable public transport
- free electric mini taxi in the city centre
- Avant2Go electric vehicles sharing scheme

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Digital projects mentioned by the Ljubljana website:

- a new chatbot for citizens and visitors on the Facebook pages of Tourism Ljubljana (in progress)
- Nexto.io smart mobile guide to destinations of cultural and natural heritage
- Urbana city card and mobile app
- Involvement in smart projects within BTC City living lab
- Ljubljana by Wheelchair app

Apart from the specific projects mentioned above, the webpage (Visit Ljubljana, 2020a) also states that: "over 14,000 events per year, which offer cultural, sporting, culinary and tourist experiences in the city and combine the offer in areas outside the city centre with which they intend to redirect tourist flows."

Turizem Ljubljana (Visit Ljubljana, 2020c) subpage entitled "Socially Responsible Tourism in Ljubljana" nudges tourists to "discover a different side to Ljubljana". Following socially and environmentally responsible activities and initiatives are mentioned which "not only provide solutions to social and environmental challenges, but also authentic local experiences". They claim you can experience it through:

- Local residents' relaxed lifestyle and about how much the quality of life means to everyone.
- A considerable number of local initiatives and projects whose common theme is the care for the environment and vulnerable social groups.
- Diverse "fields of hospitality, fair trade, co-working, reuse, recycling, and several others" confirming "Ljubljana is a city whose soul is getting greener every day".
- Restaurants where local food is prepared and served by people who are difficult to employ or have special needs.
- Cafés with fair trade coffee, and shops with recycled products and second-hand objects.
- Multitude of open-air events aimed at bringing (dispersing) life to certain neighbourhoods.
- Open-air markets.

Some Ljubljana's projects/venues that support the above statements are:

- Skuhna - Ethnic cuisine restaurant where migrants present their home cooking,
- Druga violina - Slovenian cuisine prepared by employees with mental health problems,
- Gostilna dela - restaurant where young people from socially disadvantaged groups and disabled people are trained under the guidance of experienced chefs,
- Center ponovne uporabe Ljubljana - ethical and fair-trade shopping,
- Stara roba, nova raba – thrift shop - ethical and fair-trade shopping.

4.3 Key Stakeholders

Apart from the above socially oriented service providers, the main partners and initiatives supporting the Tourism Ljubljana DMO role in mentioned awarded activities are:

- **Municipality of Ljubljana** – Tourism Ljubljana is municipality's (relatively independent) DMO department/body
- **Goodplace** - a private institution responsible for national certification in the field of sustainability in tourism with a focus on environmental sustainability (Green Scheme of Slovenian Tourism)
- **Slovenian Tourist Board** - Slovenian NTO, the initiator of the Green Scheme of Slovenian Tourism implemented by Goodplace on its behalf
- **Green supply chains** - The project was launched in 2015 at Tourism Ljubljana to increase the proportion of food and beverages made from locally produced ingredients in Ljubljana's tourist offer. The city's green hinterland, with more than 800 farms that supply the city with their crops, was thus linked to local tourism providers. The project consortium´s aim is to achieve sustainable effects, including shortening supply chains and thus their carbon footprint, reducing fertilizers and other chemical products, and at the same time promoting local small-scale industries. (https://www.visitljubljana.com/sl/turizem-ljubljana/projekti-turizma-ljubljana/zelene-nabavne-verige/, November 2020)
- **BTC City** - joint-stock company combining shopping mall, sports, entertainment, business area and urban hi-tech living lab in Ljubljana, Slovenia, with more than 500 shops. It is one of the largest shopping and entertainment complexes in Europe.
- **Avant2Go** - electric car mobility service provider in Slovenia and Croatia
- **Nexto** - Slovenian startup behind a smart mobile guide to cultural and natural heritage destinations, which determines the user's location via Bluetooth or GPS sensors and points.
- **Technology Park Ljubljana** - tech, startup and scaleup community, 75.000 m2 of infrastructure, hosting 300 member companies with 1.500 employees; some of them are addressing Smart city & living services/programs and FabLabs & OpenLabs networks.
- **Biotechnical Education Center (BIC) Ljubljana** educates high school and university students and with their help runs: the restaurant and café KULT316 at the school premises, the teahouse Primula in Ljubljana Botanical Garden and two shops with baked goods and desserts in the city. BIC also collaborates with Ljubljana Tourism and creates culinary content for their digital Holiday Calendar.

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4.4 Related Sub-issues

In November 2020 we reviewed the three most important and up-to-date strategic documents published at Visit Ljubljana page (Visit Ljubljana, 2020b):

1. Strategy for the development and marketing of the tourist destination Ljubljana 2014-2020
2. Strategic guidelines for cultural tourism in Ljubljana (2017-2020)
3. Congress Tourism Ljubljana 2020

None of them mentions the strategy of Smart Tourism Development in Ljubljana or further intensive and systematized Socially Responsible Tourism steps.

In addition to this observation, we could also not find any signs of smart/high-tech supported city solutions in general, except well-developed and successful rental bike network and other transport solutions with corresponding separate apps (bike rental, parking, public transport, ...) which can easily be considered sustainable solutions, but fail to qualify as smart.

Logically, no state-of-the-art smart-tech solution was found to be used to any significant extent in the areas of exclusion-related issues and/or locals' or tourists' leisure activities either.

4.5 Summary and Outlook

As the above selection of important awards shows, Ljubljana plays an important role of rising star among smaller EU cities that are still relatively undiscovered by foreign tourists (compared to global over tourism hotspots).

Although it is not yet possible to speak of the City of Ljubljana already being among the smart technology champions with massively widespread solutions and the premature award for smartness probably came on a wave of its sustainability achievements, the following applies:

1. Based on our introductory informative conversations with employees of Tourism Ljubljana, we perceived great interest in participating in SMARTDEST R&D activities, as they are aware that they have made great progress in the field of sustainability and now want to focus even more on smart and user/local/tourist-friendly technologies even though this is not specifically mentioned in any strategic document.
2. The City of Ljubljana has several important partners, listed in the above Stakeholders section, who have achieved important international recognition with their sustainable or high-tech achievements.
3. Ljubljana enjoys an international reputation as a small, interesting, sustainable, fresh and development-oriented urban destination with a vibrant start-up and NGO scene.

Just in the last days of preparing this report, two other important news items appeared in the local media, which we will analyse in more detail and interview their main actors in the future phases of the SMARTDEST project:

- New strategy for the development of the tourist destination Ljubljana City and Ljubljana Region for the period 2021-2027 was officially confirmed.

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- Hip British magazine Monocle ranked Ljubljana among the twenty-five best cities in the world (Small Cities Index) and called it "one of the most interesting small European capitals".

So - the prospects for cooperation with the SMARTDEST project are good. Tourism Ljubljana is ready to listen to what are their critical areas of tourism development in the city and is eager to receive proposals on how to address SMARTEST-related equity, resilience and development capacity issues; and how they can develop and introduce corresponding high-end smart tourism technology solutions.

5 Trends during COVID and perspectives on the "recovery period"

The trends during the last year impacted the city same as other capitals and caused effects discussed before. Yet it is too early to hypothesise if they will have a significant impact on the issues outlined in this report. We can argue that the economic crisis triggered by the pandemic will not help solving the housing issues. Funds necessary to provide more student and social housing will still be limited. Moreover, the lowered demand for short-term rentals will not significantly transform the problematic rental market. During the pandemic, social issues are becoming more visible and the situation of mixed generation households makes Ljubljana even more vulnerable. However, we could speculate that technological progress will be embraced faster as it would be without COVID and that the city will embrace more proper smart solutions in the phase of tourism recovery.

Conclusions

The outlined issues and characteristics described above give a solid insight into Ljubljana and its current situation. We believe that all areas and issues relevant for the city and the SMARTDEST research project are outlined in the points above. We initially clearly see the socio-political context of Ljubljana, its specifics as a city and tourist destination as well as the educational and economic centre of Slovenia. We further uncover the issues related to housing, gentrification and sustainability and technology readiness that have previously in our research been brought as the main entry points for further study.

To sum up the situation as concluding remarks on Ljubljana case, we propose the following lines:

- Slovenia's capital, Ljubljana, is located in Central Slovenia, one of twelve statistical regions. It is the strongest area in terms of economic development, and is the administrative, economic, cultural and scientific centre of the country. A third of all Slovenian companies are based in this region. Many residents from other areas commute to work in this region.

- In Ljubljana, the average gross salary per person was about 15% higher than the annual average salary on a national level.

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- Total tourist demand in Ljubljana has increased significantly in the period 2014 – 2018 with an average annual growth in overnight stays by 17%, and a growth in arrivals by 13%.
- A research study from 2016 shows that the average tourist in Ljubljana spends 51 EUR per day on all expenses (excluding sleep and transport).
- In the period 2014 – 2018, foreign tourists accounted for a steady 95% of all overnight stays in Ljubljana. Since tourist demand in Ljubljana is strongly influenced by foreign visitors, the ongoing COVID-19 crisis has hit the Ljubljana tourism economy hard.
- In the period 2013 – 2017, the total tourist demand in the city was predominantly met by hoteliers and similar accommodation (78%), however, in 2019 the number of beds, provided by Airbnb exceeded the number of beds provided by hotels.
- Airbnb is seriously changing parts of Ljubljana. In the period 2013-2020 the number of beds, made available through the Airbnb platform increased from 336 in 2013 to 7,161 in 2018.
- The inhabitants of Ljubljana have a very positive attitude towards tourism. They believe that tourism contributes well to the development of the city of Ljubljana and the local economy and that Ljubljana benefits from tourists. However, they do not feel involved in the development and planning processes and estimate that they have no special benefits from tourism.
- The inhabitants of the strict city centre, unlike other residents, perceive fewer positive effects of tourism. The only statement on which the inhabitants of Ljubljana have a quorum is that tourism makes life more expensive.
- Staff shortage in Slovenian tourism and the hospitality industry is of a permanent nature, at least until the COVID-19 pandemic. Due to the lack of local workers in Slovenia, the tourist industry employs many foreigners.
- In 2018, the rate of the risk of social exclusion was the lowest thus far and among the lowest in the EU.
- Slovenia is among EU countries with the highest housing deprivation rates. In 2018, more than a fifth of its population lived in poor housing conditions.
- The socialist real estate market was privatised in the early 90s. Inhabitants had the right to purchase the apartments in which they were living for a price way below the market value. Through this policy, 80% of Slovenians live in their own properties today and only 8% in rental flats.
- Consequently, the share of public housing Ljubljana fell from 42% (42,000 dwellings) in 1992 to only 3% (4200) owned by the municipality.
- The state did not develop new supply institutions and hindered the development of public housing supply. State policies were also reflected in municipal policy, which has not paid serious attention to housing for the last 25 years.

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- Looking at the purchasing power of residence in Ljubljana, the current average net salary is around 1,200 EUR (SORS 2020) a month, and the average rent for a two-bedroom apartment in Ljubljana is between 700 and 800 EUR, 900 EUR or more if we include additional living costs such as heating, water and electricity.
- The average real estate price in Ljubljana in 2019 was around 3.000 EUR per square meter.
- The impact of the new coronavirus pandemic also leaves a mark on the Ljubljana real estate market. Major shifts are already happening in the rental market. The lack of tourists hit homeowners particularly hard, who usually rented out to tourists via platforms such as Airbnb and Booking. As a result, many people started renting out apartments on a long-term basis, and some even decided to sell them. The offer of rental housing in Ljubljana is currently much higher than in previous years, and with a larger share of recently renovated properties. In addition, rents have fallen by an average of around 15 percent and more.
- Ljubljana, like other cities, is in a state of ambiguity regarding the term "smart city/tourism".
- In recent years, Ljubljana has won several important awards in areas of "sustainability" and "smartness" that place Ljubljana in the role of the rising star among the smaller EU cities.
- Gentrification as we know today was no hot topic in Ljubljana during the period of socialism. A look back to the 1980s and 1990s (the period of deindustrialization) shows a clear trend of population decline in the Ljubljana city centre.
- Demographic change, the aging of the population and the consequent long-term labour shortage are some of the issues Slovenia will face in the future.
- Being the capital has caused intensive immigration from the rural areas and from other republics of former Yugoslavia.
- Due to Slovenia's geographic position in a migration sensitive area at the intersection of the Balkan and central Europe, it became increasingly under pressure at the end of 1990s. The country was attractive as a location of transition as well as a final destination for people fleeing war and distress.
- The total flows of labour migrations of Ljubljana include around 152,500 people, three times less than the second largest city in Slovenia Maribor.

Future research

This preliminary report on Ljubljana state-of-the-art of matters presents an initial exploration of key dimensions of tourism development and social environment surrendering, the role of national and local policy and the stakeholders involved through the evolution of the city (see Timeline in the Appendix 1) in the ultimate two decades, as well as the current challenges triggered by the COVID-19 pandemics. The report is based on diverse data including private resources belonging to Turizem Ljubljana and used by permission, diverse media sources and

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public discourses and supplemented by limited academic sources, as in the scarcity thereof, we were bound to research mostly conducted as parts of master and bachelor projects as well privately financed academic survey that were however not published in peer-reviewed outlets.

Based on the general framework of SMARTDEST project, but also adapting to the key issues in Ljubljana identified in this report, the objectives of this case study are:

- Find solutions to stimulate smart tourism development in the city as an upgrade of current sustainability achievements.
- Seek for solutions from other case study cities that have proved to work to cope with the gentrification and touristification of the main centre.
- Efficiently prepare grounds for the implementation strategies from other cities that were successful in mitigating the over-tourism related crowding once these will again be necessary.
- Establish a constructive dialog between tourism and housing issues with the involvement of varied stakeholders from socially excluded groups to seek solutions that could be beneficial for the city in light of post COVID-19 recovery.

Ljubljana case study will be based on an iterative research design, aiming to incorporate evidence gathered at one point in the research process into the following stages of the research (an approach also known as hermeneutic spiral). Overall, the research process will involve quantitative and qualitative data collection, with the latter being the dominant approach.

Based on the findings of this report and other additional preliminary analyses, a number of key stakeholders will be selected to conduct semi structured in-depth interviews and focus groups. Interviewees will be selected among the following organisations:

- Turizem Ljubljana
- Ljubljana Municipality
- Student Union
- Civil associations related to Housing

Further approaches and refined set of methods will be selected once the research is completed in the first set of case study cities based on the obtained results bearing in mind the best matching fit with the research skillset of our team members.

Lastly, the COVID-19 pandemic might slightly impact the process of qualitative data collection (reduced possibilities for participant observation, bias in obtained results due to pandemic-stress, stakeholders' focus on other crisis issues rather than tourism agenda, etc.), which can nevertheless be conducted in a modified digital format.

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Appendix

Timeline Ljubljana: 2000-2020

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Policy			Municipal Sustainable Development Strategy	National Housing Law						Turizem Ljubljana established as DMMO	Municipal Urban Development Plan			Student Labour Reform	Municipal Toursim Strategy SRTTDL 2016-2020		Municipal Cultural Tourism Strategic Guidance 2017-2020	National Tourism Strategy STRST	National Tourism Development Support Law ZSTR		Tourism Strategy 2020-2026
Infrastructure								Closure of Triple Bridge and Wolfova Streen for Traffic	Stožice Stadium and Hall project completed Closure of Bežigrad Stadium (still awaiting renovation)	Start of Passenger Terminal Project (no signs of progress till present)							The main city centre avenue becomes semi-pedestrian area			Redevelopment of Trubarjeva street	
Events			Danica Simšič elected a Mayor		Slovenia joins EU		Zoran Janković elected a Mayor		First Slovenian EU Presidency Real Estate Pricing Peak of the Decade	Global Financial Crisis hits Slovenia				Eurobasket Championship Municipal Unemployment Record		Petra Stušek named the Director of Turizem Ljubljana	EU Green Capital		Risk of Social Exclusion at All-Time Low Level of 2000s	AirBnB bed supply exceeds the Hotel bed supply in the city Record Year for Municipal and National Tourism Real Estate Pricing Peak of the Decade	COVID-19
Awards															TOP 100 Sustainable Destinations (2014–2019)	Green Destination Gold Label WTTC Tourism for Tomorrow Award		WTM Responsible Tourism Award for sustainability	European Smart Tourism Capita Award for sustainable efforts	European Smart Tourism Capital Award for digitalisation efforts Green Destination Gold Label for the 5th consecutive time	
Resistance											Massive student protests								First negative voices about the crowding of the city centre start appearing in relation to tourism		

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IV. CASE STUDY: Turin

Exploration of Turin: context and trends of social exclusion, forms of coping and innocative community solutions

Authors: POLITO (Samantha Cenere, Erica Mangione, Loris Servillo)

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Introduction

Turin is the capital of Piedmont, a region of 4,356 million inhabitants situated in the North-West of Italy. The city is mainly known for its strong industrial past, which was deeply intertwined with the history of FIAT, the automotive company that used to be based in Turin. The dismantling of FIAT and the general crisis of Fordism could be seen as core events of Turin's recent history. This painful process stretched over a period of 40 years. In 2014, the latest development step has been taken. FIAT was converted into FCA-Fiat Chrysler Automobiles due to the merging with the US company Chrysler Group; an event that marked even more clearly the unstoppable drifting apart of Turin's core economy related to car manufacturing and industrial production in general.

The recent history of the city has been therefore characterised by what can be interpreted as various attempts to pursue a sole goal, that is, to overcome the void that the deindustrialization process has left not only in the economic fabric of Turin, but also in the social and political domains. Indeed, Turin is also an example of what are usually labelled as shrinking cities, losing every year a consistent share of its population.

Within this broader culture-led rebranding strategy, the attraction of people and investments plays a central role. In the last 20 years and particularly since the Winter Olympic Games hosted in 2006, Turin has implemented a political agenda to transform tourism into a key economic asset for the city, strongly increasing tourist presences. Indeed, tourism has been seen as a key element for a city that still wants to pursue a culture, service and leisure-based economy, in the attempt to be competitive at the global level.

Within this rebranding strategy, local policymakers and a broader coalition of actors identified the need to invest on the knowledge economy as a further important element to reconvert its socioeconomic fabric. Among them, the two main local Higher Education institutions have been playing a relevant role in defining a new vision for Turin's development. Recently, this objective has led to the implementation of a parallel agenda, focussed on the attraction of HE students with consequent implications in the reconfiguration of the urban fabric.

1 The contextual dimensions and the main trends

1.1 Political and administrative situation

In Italy, the administrative powers of both the municipalities and the regions are established by the Constitution and they were amended through important reforms introduced in the last twenty years. The Italian Constitution establishes the principle of administrative decentralization in the article n.5, which states that the Italian Republic promotes local autonomies and enacts the administrative decentralization. In 2001, in order to further implement this principle, the Titolo V of the Constitution was reformed to redefine the distribution of powers among the various levels of government. The reform gave more power to regions, municipalities, and provinces (now, città metropolitane). Notably, the legislative power of the national Parliament was strongly reduced and increased the regional one. With regards to the administrative power, the reform introduced the principle of subsidiarity, establishing that administrative functions must be carried out by the institutions closest to the citizens – i.e. municipalities.

A further important change was introduced in 2014 through the local government reform. The national law 56/2014 transformed the former Provinces in a second-tier administrative level, without a direct election of its political body. Seven of the reformed provinces that embed the biggest urban areas were transformed in Metropolitan Areas ("Città Metropolitana"), with the mayor of the larger urban administration appointed also as the mayor of the Metropolitan Area.

Turin is the largest one among all Italian Metropolitan Cities. It comprises of 312 municipalities. The Metropolitan City goes far beyond its built-up fabrics, its metropolitan functional area, and/or the area with high economic and social relations. It encompasses the flat land in which Torino and other municipalities and small urban poles are located, and several mountain valleys.

At the same time, within the administrative border of the Municipality of Torino, the implementation of the administrative decentring imperative has led to the current administrative division of Turin into 8 macro-districts (*circoscrizioni)*. The *circoscrizioni* were designed in 2016 to function as a bridge between the smaller districts and the municipal level, but the citizens have never considered them as true interlocutors and, during the years, some of their competences have been re-centralized.

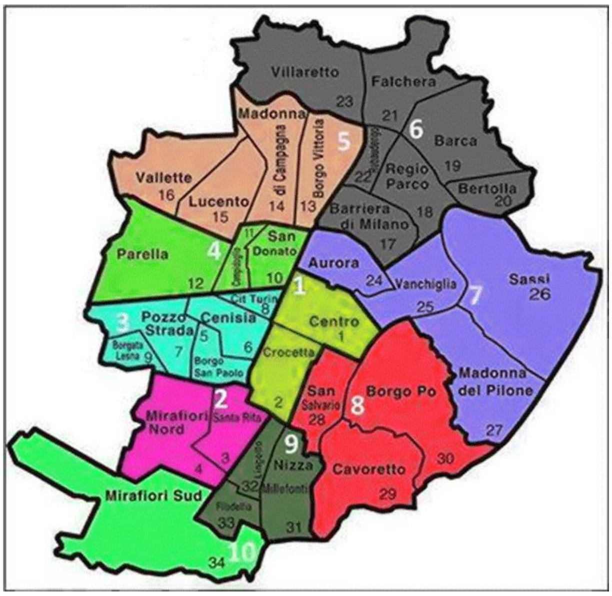

Figure 25: Turin's circoscrizioni and neighbourhoods. Source: Atlante di Torino.

Politics

The last twenty years of Turin's political history (and the ones of the other main Italian cities) have been marked by a major transformation that took place during the 90s. In 1993, law 81 established the direct election of mayors, thus giving unprecedent powers to them. Since then, mayors were not dependent on their own parties, but were able to use their leadership to gain popular consensus to build ad-hoc coalitions (Amato et al., 2011). In Turin, the first mayor to be elected through the new law was Valentino Castellani, former vice-chancellor of Politecnico di Torino, elected as an independent candidate backed by a centre-left coalition and mayor for two consecutive mandates until 2001. Castellani was able to establish a new urban regime (Belligni & Ravazzi, 2013), in which politicians, entrepreneurs, and members of the civil society worked in a cooperative way to lead the urban economy out of the crisis of the Fordist model of growth and to tackle the relevant loss of population (see section *Social*). Many turning points for Turin's history took place during his mandate, such as the 1999 bid for the Winter Olympic Games – hosted in 2006 and in which Castellani played a crucial role as president of the TOROC, the Games' organising committee –, the adoption of a new masterplan in 1995, the launch of the suburban redevelopment programme 'Special Project Peripheries', and the First Strategic Plan (see next section).

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Since Castellani's election, an impressive operation of city image transformation and economic transition was launched (Vanolo, 2015b). Its climax was reached in the hosting period of the Winter Olympic Games, that took place under Sergio Chiamparino' mayorship (centre-left), which started in 2006.

Albeit for a long time the Olympic Games were celebrated as the most important and positive transformative event for Turin, the city had to deal with a major backlash that hits most cities hosting a mega-event. According to a study made by the CGIA of Mestre, the General Artisans' Association that conducts research on many economic topics, in 2010 the debt per capita was 3,806 euros, the highest among the Italian provincial capitals[2].

2007		2012		2017	
TORINO	250%	TORINO	288%	TORINO	4.000
Milano	245%	Reggio C.	224%	Milano	3.054
Reggio C.	208%	Genova	154%	Napoli	2.693
Genova	206%	Milano	147%	Reggio C.	2.675
Roma	197%	Napoli	145%	Roma	2.120
Napoli	120%	Catania	117%	Genova	1.951
Messina	99%	Firenze	91%	Firenze	1.298
Firenze	85%	Messina	80%	Venezia	1.222
Trieste	74%	Trieste	73%	Catania	1.191
Bari	60%	Venezia	62%	Trieste	722
Venezia	58%	Bologna	38%	Messina	658
Palermo	57%	Palermo	34%	Palermo	466
Bologna	57%	Bari	25%	Bologna	373
Cagliari	29%	Roma	25%	Cagliari	327
Catania	n.d.	Cagliari	17%	Bari	284

Figure 26: Public debt in the Metropolitan Cities. The values for 2007 and 2012 correspond to the percentage of debts on the current revenues collected in that year; the values for 2017 correspond to the per capita public debt in euros. Source: Centro Einaudi, 2019: 228.

The so-called "Sistema Torino", which could be summarised - with a certain degree of approximation – as a pro-growth urban coalition that aimed at constructing a post-industrial future for the city, was composed by public actors revolving around the centre-left mayors and private actors coming from different areas, such as bank foundations, universities, and local companies mainly belonging to the industrial sector. This coalition worked on three main sub-agendas, summarised by Belligni and Ravazzi (2013) under the labels *pyrotechnic Turin*, *polytechnic Turin*, and *polycentric Turin*. The three labels pointed at the main growth sub-strategies identified by the stakeholders involved, namely culture and creativity, the knowledge economy, and the real estate and infrastructural asset. Although the members of these coalitions were united by a shared understanding of economic growth as the sole path to be undertaken, they had heterogeneous socio-professional profiles. Notably, professional politicians cooperated with people working for private corporations, members of the non-profit sector, and local academics, the latter being a highly representative group (Belligni & Ravazzi, 2013). This distribution of power reflected on the one hand the decreasing relevance of political parties at the local level, and on the other hand a certain overlapping between the growth coalition and the ruling left-wing party.

One of the instruments that mostly favoured the creation of this powerful coalition of actors were the Urban Strategic Plan (Amato et al., 2011; Saccomani, 2011), a non-statutory instrument

[2] http://www.cgiamestre.com/wp-content/uploads/2012/07/comuni-indebitati.pdf

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not foreseen by the Italian planning legislation. Started in 2000, when Turin was the first Italian city to adopt a Strategic Plan drawing on the experience of some major European cities, it is currently at its third version.

The rationale of the first Strategic Plan, called *Torino Internazionale*, was to promote the city through a strong operation of territorial marketing, to make the city more competitive at the international level (Amato et al., 2011; Vanolo, 2015a). The plan identified the need for Turin – as happened in many other cities – to leverage on tourism and culture to build a new growth strategy that allowed to overcome the empty space left by the industrial crisis.

The second Strategic Plan, released in 2006 after the Olympic Games, gave stronger emphasis on the role of the knowledge economy. However, the shift to the service sector was only partially met, since the slowing down of the tertiarization process combined with the maintenance of the industrial basis (Amato et al., 2011: 220).

The third Strategic Plan, entitled *Torino Metropoli 2025*, was released in 2015. The plan aimed at finding a local re-positioning in relation to the transformations on a national and international level, such as the 2008 global financial crisis and an institutional reform that introduced Metropolitan Cities asking for new visions on metropolitan governance (Ponzini & Santangelo, 2018).

Albeit having characterised the last 20 years of Turin's history, the regime that has accompanied the early decades of the current millennium resulted 'weak' and with uneven effectiveness. 'It may be defined effective in some policy sectors (large-scale infrastructures, leisure and tourism), but it seems unsatisfactory in others (economic internationalization, research and innovation, environmental sustainability, the new welfare) and it fails to achieve its systemic purpose: a radical change of the city's pattern of development' (Belligni & Ravazzi, 2013). To wreck the project of a grand urban transformation project developed after the crisis of Fordism was also the fact that the 4 million debt of the Municipality intertwined with the 2008 great economic recession and the consequent cut in public investments (Bagnasco et al., 2020).

Nevertheless, the urban regime labelled 'Sistema Torino' governed the city until 2016, when the national (and international) anti-political and anti-establishment sentiment led to the election of a mayor from the 5 Stars Movement, Chiara Appendino. The geography of voting portrayed a dynamic that was similar to the ones of other main Italian urban centres in which local elections were won by anti-establishment candidates. Indeed, won over the centre-left candidate (the incumbent mayor Piero Fassino) in all the *circorscrizioni* except the central one, registering the highest deviation between the two in the most peripheral parts of the city and in those social groups that perceived themselves as *unrepresented* (Cepernich et al., 2018).

Because of the intrinsic difficulties of current policy-making dynamics, no coalitions of actors in recent years were strong enough to propose a convincing agenda for Turin able to change the fate of the city. Instead, 'it is indeed an effervescence of initiatives to reveal coordination difficulties; […] even if they trace an intention of plan, the governing institutions struggle in implementing and completing it' (Bagnasco et al., 2020: 40). In August 2018, the City Council launched the project *Torino 2030*. It was an attempt to build a coalition of actors and to provide an agenda to meet the interests of policymakers, members of the civil society and economic actors. In line with the UN Agenda 2030 on sustainable development, the project is built on four axes: participated, dynamic, liveable, and supportive Turin. The main goal of the document

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is to offer a blueprint and a vision over which the citizens are asked to coalesce and propose projects and actions to build a sustainable and resilient city.

Turin's Smart agenda

Several initiatives in the last two decades have characterised Torino in the attempt of making use of smart technologies in several contexts. In 2011 the city launched its candidature to become a smart city recognised by the EU (Santangelo, Aru, Pollio, 2013), responding to the EU call *Smart Cities and Communities.* This process culminated in 2013, when the city developed the strategic masterplan *Smile* (Smart Mobility, Inclusion & Integration, Life & health, and Energy) as the result of a four-year process that aimed at transforming Turin into a smart city. The project involved over 350 stakeholders. However, the recommendations listed in the masterplan were not implemented (Centro Einaudi, 2016) and the whole smart city strategy was another attempt for the city to build a new powerful and competitive brand (Vanolo, 2015b) without a consistent implementation.

During the last years, Turin's smart agenda has been enriched with the so-called *Turin City Lab*, an initiative that is built upon the partnership with various enterprises. In this program the city is seen as a lab where various innovative solutions are tested. The aim of *Turin City Lab* is to realise innovative solutions in the domains of mobility, environment, and tourism. The first initiative launched within this framework was the living lab implemented in Borgo Campidoglio, a small residential neighbourhood in the western part of the city. The neighbourhood used to be an area populated by small shopfloors and artisanal workshops, located in low buildings with internal courtyards. Now, the Borgo has become famous mainly thanks to the Urban Art Museum, an open-air museum inaugurated in 1995.

Additionally, smart initiatives have been implemented to tackle the Covid emergency too. It is worth mentioning that Turin is currently the only Italian city shortlisted in the *World Smart City Awards 2020* thanks to the initiative *Torino City Love*: a public-private-partnership project tackling multiple cases of social exclusion (i.e. education, health, work, digital services, etc.) through innovative and high-tech solutions provoked by the Covid-19 pandemic.

Mobile dwellers as a target of the local institutions

Albeit rarely explicitly stated, different groups of mobile dwellers have been recurrently the target for the transformations that took place in Turin over the last twenty years. In particular, its status of shrinking and post-industrial city has led the city administration to look for strategies of growth that, on the one hand, feed the urban economy making it more reliant on consumption and leisure and, on the other, constitute a way to address the issues of urban voids and stimulate the local real estate market.

For the city, a clear example is the recent initiative *Turin Open for Business,* an online platform sponsored by the urban administration that aims at proving comprehensive knowledge on abandoned industrial areas in need of future investments. The interesting aspect of the platform is that these areas are grouped in three categories, namely innovation, tourism, and university. This is a clear evidence of an underlying strategy aspiring to implement urban transformations by means of attracting both capitals *and* mobile people.

Another clear example of the juxtaposition of the two groups of mobile dwellers when it comes to urban growth strategy is contained in a promotional video[3] made by *DMO Piemonte* (Destination Management Organization), the regional agency in charge of territorial marketing. In the video, both Italian and foreign students come to Turin from outside the region praise the city as a perfect destination for everyone who is looking for a good quality of life, great cultural offer, rich diversity of natural and cultural venues, and affordability.

1.2 A cultural destination for urban tourism

Since the first Strategic Plan, the aim of transforming Turin into a city pivoting on culture, tourism, and creativity was at the core of the political agenda. The 2006 Winter Olympic Games certainly constituted a turning point for what concerns the attractiveness and touristic characterization of the city, attracting 1.5 million tourists (Urban Center Metropolitano, 2016). Four years after, another big event, the 150th anniversary of the Italian Unity, contributed to enhance the image of Turin as an interesting cultural venue.

Besides these major events, the city has chosen to rely on the organisation of many heterogeneous events as one of the most important axes for its promotional strategy. Among the most renown events organised on a regular basis are: the food event *Salone del Gusto-Terra Madre*, the book exhibition *Salone del Libro*, the automobile exhibition *Salone dell'Auto*, the art festivals *Artissima* and *Paratissima*, the creativity festival *Graphic Days*, the *Torino Film Festival,* together with smaller events such as the chocolate festival *CioccolaTO*, the events *Torino Spiritualità,* and *Torino Danza.* Moreover, Turin is a well-known destination for music lovers, thanks to high-quality music festivals such as *Torino Jazz Festival, Kappa FuturFestival, Club TO Club, Movement* and *Traffic Festival* (the latter closed in 2014).

During the past 20 years, the city implemented tourism-attracting strategies that produced important results. In the Metropolitan City, the number of tourists has increased over the period 2007-2016 by 74% (compared to a +7% at the national level), while over the years from 1999 to 2006 the growth was even more impressive, reaching a +146% (Centro Einaudi, 2018: 168). In 2016, the city registered 2,3 million arrivals and 6,8 million presences (Centro Einaudi, 2018). However, compared to the other Metropolitan Cities, Turin's performance in the statistics of touristic relevance positions the city among those registering low rate of touristic presences per square kilometre (Centro Einaudi, 2018).

Tourists coming to Turin are mainly Italians, whose presence has increased by 150% in the last 20 years. Concerning international tourists, the most important country of origin is the direct neighbour France, followed by the UK, Germany, Spain, Switzerland, the USA and China.

[3] https://video.repubblica.it/edizione/torino/torino-spot-turistico-per-il-piemonte-degli-studenti-universitari-in-trasferta/325440/326056?

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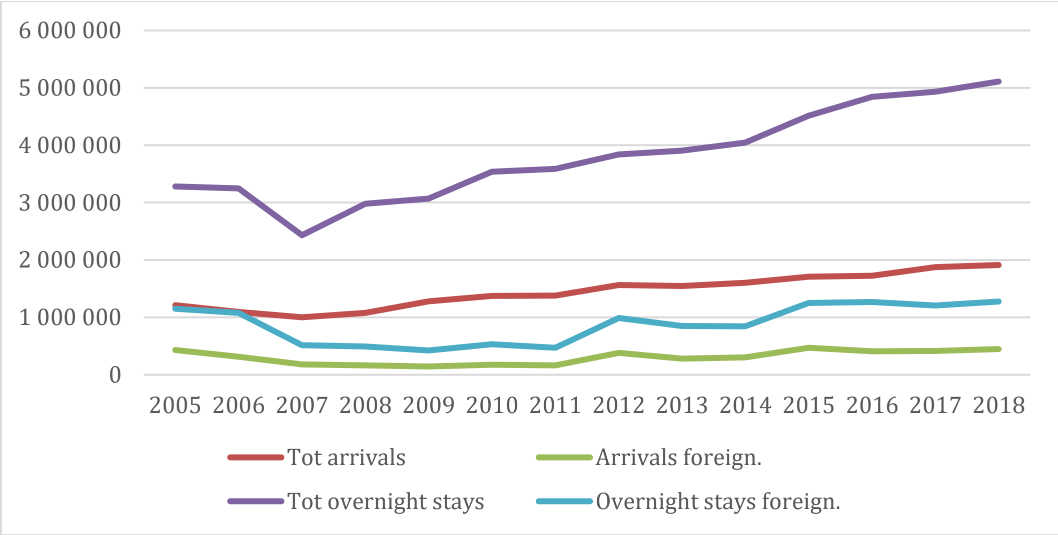

Figure 27: Trends in tourist presences in Turin's area. Source: Metropolitan City of Turin, own elaboration.

As per the offer of touristic accommodation, Turin presents figures that are in line with the size of the city. In the Metropolitan City, the offer of bed places amounts to 70,000, distributed in 747 accommodation facilities (Centro Einaudi, 2018). However, the city is not characterised by a touristic specialization with regards to its workforce. Indeed, in 2015, the city was second only to Milan for low numbers of people employed in tourism-related sectors (i.e. accommodation, catering, restaurants, bars and cafés).

Following the general trend that has been characterising all tourist destinations, Turin has also experienced the growth of the short-term rental platform Airbnb. From 2015 to 2018, the number of tourists booking through the platform has constantly increased, albeit presenting different monthly trends. In April 2018, Turin had the seventh highest number of listings (3,800 in 2017) of all Metropolitan Cities (Centro Einaudi, 2018). Bookings on Airbnb seem to be positively correlated with some of the festivals and events listed above (Puccia, 2019).

Metropolitan cities	Tourism infrastructure capacity, 2018
Venezia	173,7
Napoli	84,1
Trieste	67,8
Milano	61,2
Roma	54,6
Firenze	27,8
Genova	21,5
Bologna	10,4
Torino	10,3

Figure 28: Index of tourism infrastructure capacity (bedplaces and other similar accomodation facilties). Source: Istat, own elaboration.

The rise of students in Higher Education

During the last ten years, Turin has considerably increased the number of students enrolled in the two main HE institutions of the city (University of Turin and Polytechnic of Turin), especially with regards to young people coming either from other regions or from abroad. Currently, Turin's inhabitants are less than 880,000, and students have reached the significant number of 112,224 (data relative to 2019). Indeed, while the number of students coming from other parts of Piedmont has been gradually decreasing during the years, both the University and Polytechnic have become more attractive to students coming from outside the region. As a matter of fact, people coming from other Italian regions are 20.3% at the University and 46.7% at the Polytechnic, while the share of non-Italian students is stable at the University (1.6%) and slightly decreasing at the Polytechnic (7.5%).

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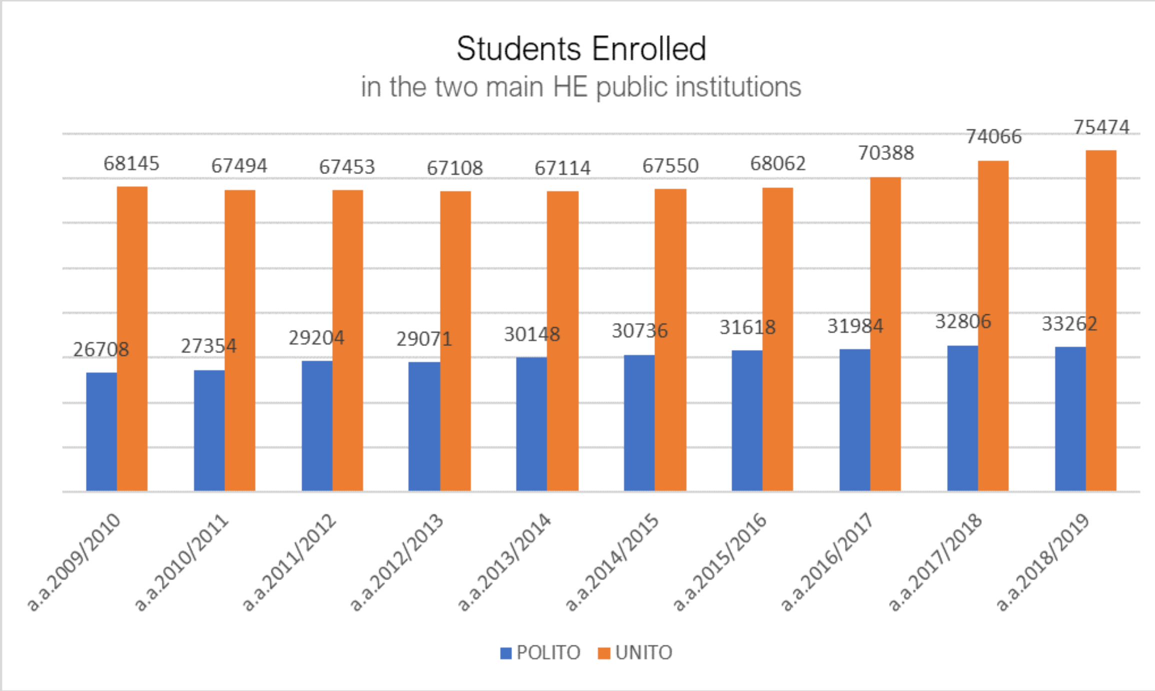

Figure 29: Students enrolled in the two main Turin universities, absolute values. Source: Elaboration by the author on data of the Osservatorio Regionale per il Diritto allo Studio del Piemonte.

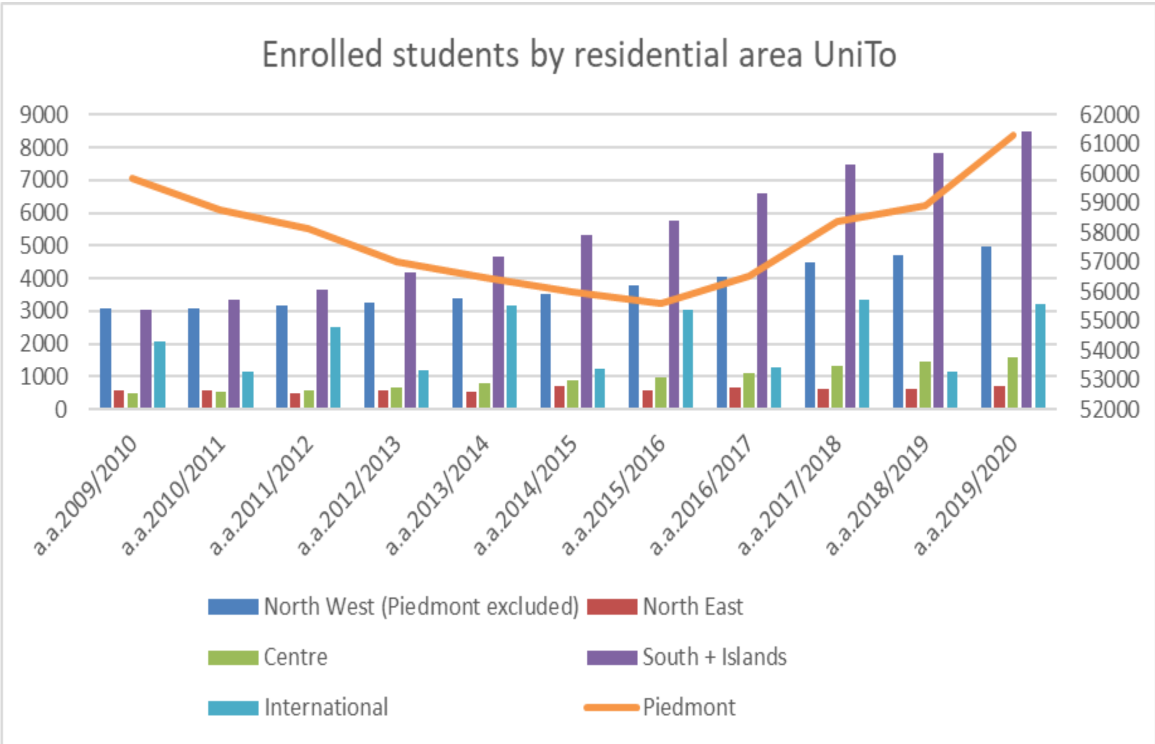

Figure 30: Students enrolled at University of Turin and their region of origin, absolute values. Source: Elaboration by the author on data of the Osservatorio Regionale per il Diritto allo Studio del Piemonte.

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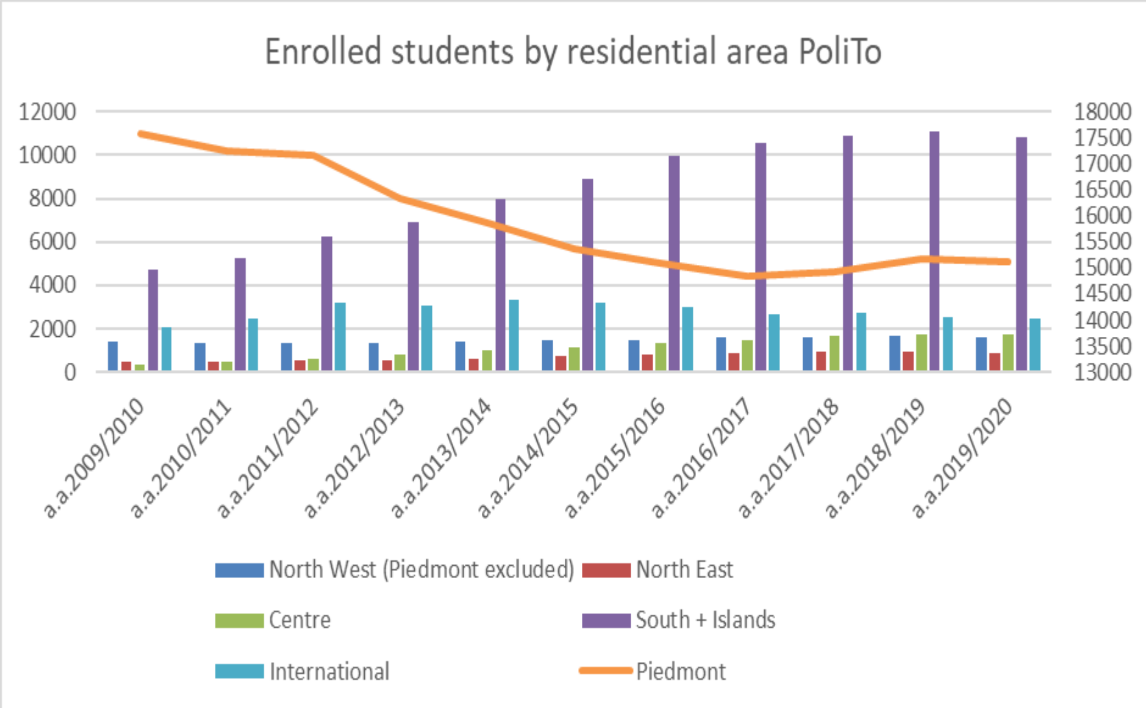

Figure 31: Students enrolled at Polytechnic of Turin and their region of origin, absolute values. Source: Elaboration by the author on data of the Osservatorio Regionale per il Diritto allo Studio del Piemonte.

The growing number of young people coming to Turin to study represents not only a success of local HE institutions but also an engine of economic growth for the city. However, this economic impact is not so much related to what is usually identified through the label 'knowledge economy'. Research on the topic conducted ten years ago shows how students´ consumption patterns (and the ones of relatives and friends coming to visit them) importantly affect the economic fabric of the city. Notably, the local economic impact of the HE institutions amounts to 1.67 billion on the short term and to 1.92 billion on the long term, with the consumption behaviour of students both coming from Regions other than Piedmont and commuting contributing to it for 65% (Fondazione Rosselli, 2009). These observations show how students' behaviour is partially similar to the one of tourists, also with regards to its effects on the city's economy.

1.3 Social situation

Demographic trends and migration

Since the 1970s and the crisis of a socioeconomic fabric viscerally characterised by the industrial sector, Turin has undergone an increasing loss of population, becoming what is usually called a shrinking city. The end of the Fordist model of growth that characterised what was commonly known as a European one-company town, together with the most recent economic crisis started in 2008, have provoked what seems a relentless outflow of people from the city.

Between 1998 and 2018, Turin's resident population has undergone a 2% decrease. Notably, in the years that followed the 2008 economic crisis, the city lost more than 37,000 residents, passing from more than 908,000 in 2007 to 872,316 in 2019.

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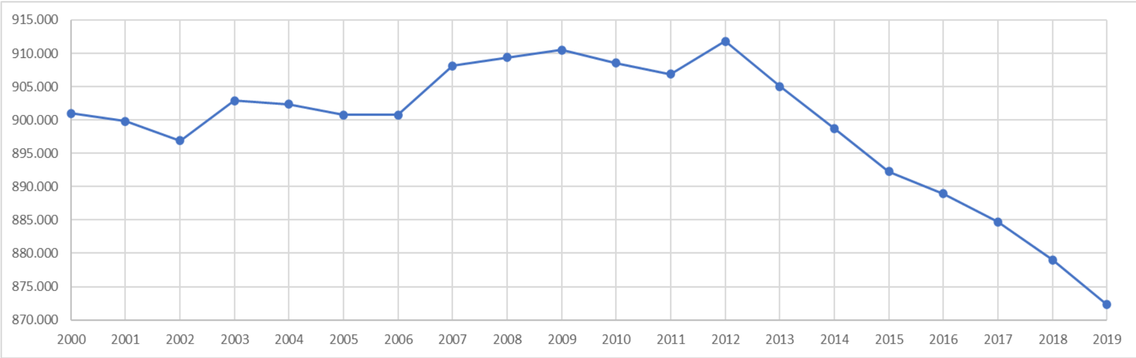

Figure 32: Demographic trend of the resident population in Turin. Source: Statistical Office of the City of Turin, own elaboration.

On the contrary, over the same period Turin´s share of foreign residents increased substantially, passing from 3% to 15% between 1998 and 2018. They concentrate mainly in Circoscrizione 6 Barriera di Milano, Falchera, Regio Parco – 25% – and Circoscrizione 7 Aurora, Madonna del Pilone, Vanchiglia – 20% – (Settore Statistica e Toponomastica della Città di Torino). Although, in 2019, 132,878 foreigners resided in the city, their number is diminishing as well. This is partially due to three factors: decrease in international migration, increase in the outflow of foreigners, and increase in the acquisition of Italian citizenship.

	2009		2010		2011		2012		2013	
	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri
Romania	51.215	41,2	52196	40,4	53.724	40,1	56438	39,7	55.333	39,5
Marocco	18.962	15,3	19424	15,0	19.859	14,8	20577	14,5	19.892	14,2
Rep. Pop. Cinese	4.981	4,0	5518	4,3	6.059	4,5	6786	4,8	7.128	5,1
Perù	8.208	6,6	8808	6,8	9.133	6,8	9569	6,7	9.390	6,7
Egitto	3.672	3,0	4024	3,1	4.317	3,2	4706	3,3	4.779	3,4
Nigeria	2.978	2,4	3256	2,5	3.527	2,6	3974	2,8	4.277	3,1
Albania	5.571	4,5	5710	4,4	5.839	4,4	6078	4,3	6.093	4,3
Filippine	2.950	2,4	3189	2,5	3.366	2,5	3603	2,5	3.752	2,7
Moldavia	3.509	2,8	4146	3,2	4.637	3,5	4883	3,4	4.860	3,5
Bangladesh	762	0,6	872	0,7	986	0,7	1147	0,8	1.277	0,9

	2014		2015		2016		2017		2018		2019	
	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri	Stranieri	% su tot. stranieri
Romania	54.775	39,7	53.819	39,5	52.626	39,6	52088	39,2	51.206	38,5	49507	37,3
Marocco	19.193	13,9	18.628	13,7	17.147	12,9	16693	12,6	16.577	12,5	16872	12,7
Rep. Pop. Cinese	7.137	5,2	7.327	5,4	7.498	5,6	7519	5,7	7.501	5,6	7496	5,6
Perù	8.858	6,4	8.354	6,1	7.529	5,7	7386	5,6	7.269	5,5	7192	5,4
Egitto	4.744	3,4	4.677	3,4	4.730	3,6	4988	3,8	5.155	3,9	5525	4,2
Nigeria	4.487	3,2	4.662	3,4	4.912	3,7	5163	3,9	5.413	4,1	5461	4,1
Albania	5.986	4,3	5.776	4,2	5.375	4,0	5330	4,0	5.376	4,0	5384	4,1
Filippine	3.762	2,7	3.764	2,8	3.725	2,8	3768	2,8	3.799	2,9	3768	2,8
Moldavia	4.680	3,4	4.449	3,3	3.939	3,0	3692	2,8	3.576	2,7	3343	2,5
Bangladesh	1.339	1,0	1.383	1,0	1.436	1,1	1585	1,2	1.730	1,3	1954	1,5

Figure 33: Foreign residents in Turin, first 10 nationalities. For each year, the first column indicates the total amount in absolute numbers, the second column the percentage of each nationality over the total number of foreign residents in the city. Source: Statistical Office of the City of Turin.

Besides an annual net migration that depicts a city unable to attract and retain people, with a loss of 2,487 residents in 2018, the figures concerning the rate of natural increase are particularly negative. Since 2008, the birth rate has severely dropped, reaching in 2018 6.9%, while the mortality rate registered in the same year was 11.9% (Source: Istat). During the past years, this negative trend was balanced by the higher natality rate of foreign families. The share of children of foreign couples compared to the total number of births in Turin has strongly increased over the last years, passing from 10% in 1998 to 27% in 2008, and stabilizing in 2017 around 29%. However, this is no longer the case, as the average number of children per foreign woman has decreased in the last years, passing from 2.6 in 2002 to 1.9 in 2017 (Centro Einaudi, 2019b).

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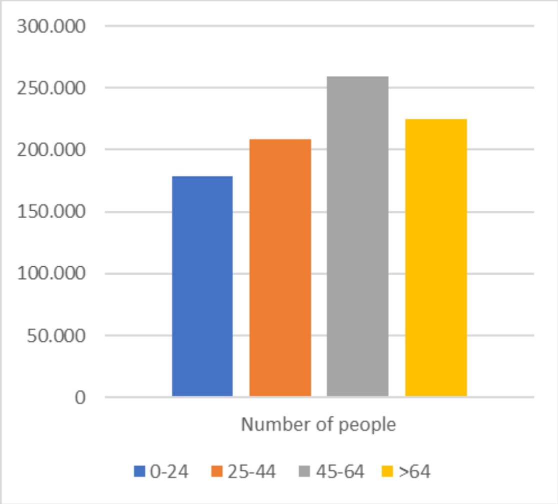

Figure 34: Residential population per age cohort. Source: Statistical Office of the City of Turin, own elaboration.

The figures regarding the birth rate are mirrored by the ones on the average age of Turin's population, with the slot of young adults particularly alarming. Over ten years from 2008 to 2018, people aged 25-44 decreased by 17%, while people over 64 increased by 6% over the same period (ibid.).

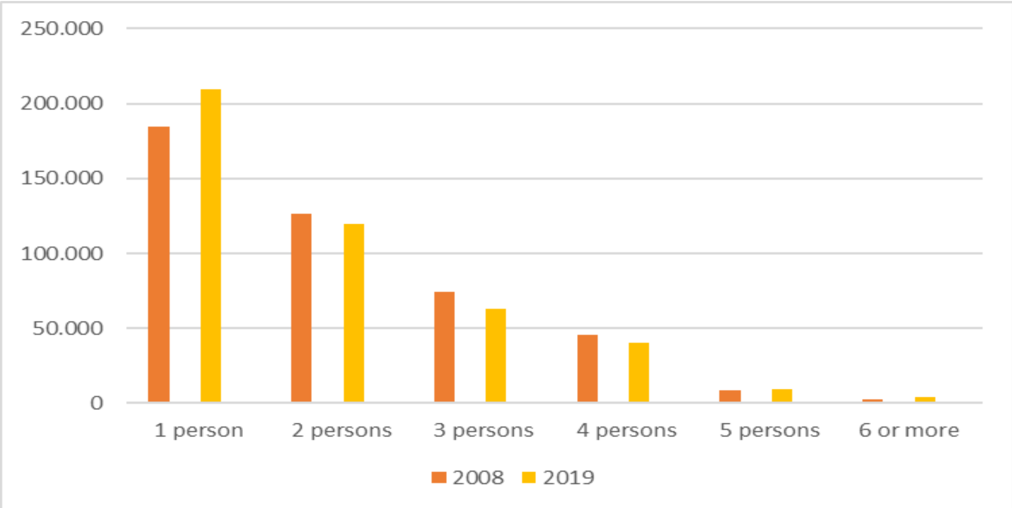

Figure 35: Total number of households per household structure. Source: Statistical Office of the City of Turin, own elaboration.

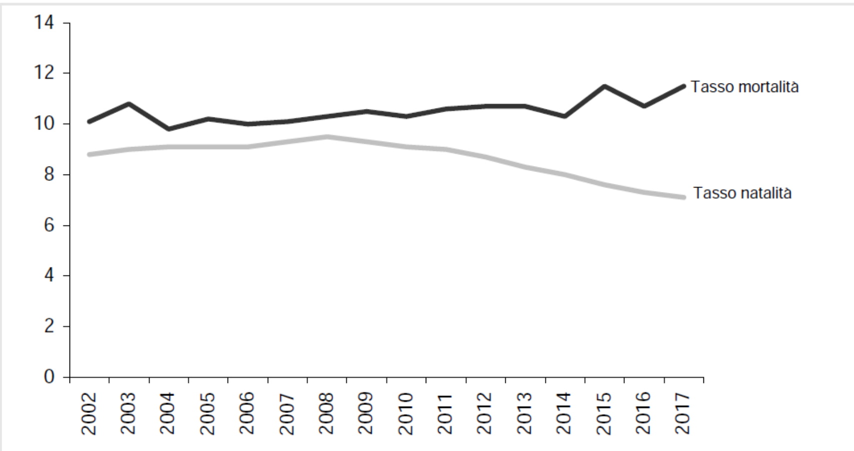

Figure 36: Mortality and natality rate in the Metropolitan City. Values for 1,000 inhabitants. Source: Elaborations on Istat data (Centro Einaudi, 2019: 21).

Housing

The ratio between tenants and owners in Turin reflects a national trend with an increasing share of homeowners in the years after the economic boom. In 1951, 83.8% of Turin's residents lived in a rented house, while this percentage started decreasing twenty years later (64% in 1971), reaching 28.4% in 2011 (Davico, 2018).

Housing costs constitute a critical issue in the city. Compared to 20 years ago, the amount of household's income spent on housing costs has increased by more than 10%, reaching 31.5% in 2016, while housing prices have not undergone a similar increase (ibid.). Indeed, Turin registers average housing prices that makes the city more similar to main urban centres of Southern Italy instead the ones of the North. Moreover, important urban transformations occurred during the last twenty years in some peripheral parts of the city and did not result in significantly raising prices of the real estate market in those areas.

In 2019, almost 2,500 eviction procedures were issued at Turin's court, 91% of which due to rent arrears. After the 2008 financial crisis, the number of evictions in the city constantly increased, reaching the highest amount in 2014 (+284% from 2007 to 2014; cf. Davico, 2018) and then substantially decreasing. However, since 2017, the number of people evicted in Turin has started a second round of slow while evident growth.

Figure 37: Eviction procedures. In red the ones for expired contracts, in purple the ones for arrears. Source: Osservatorio sulla Condizione Abitativa della Città di Torino, Rapporto 2019: 26.

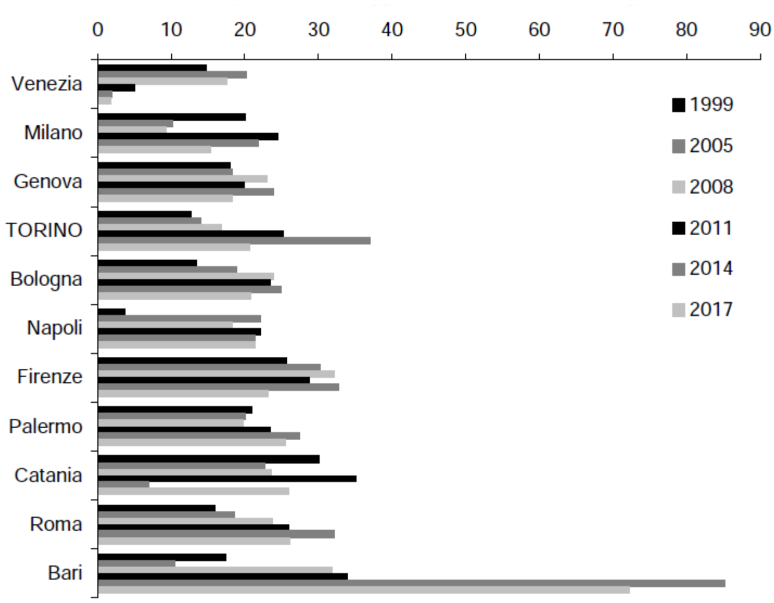

Figure 38: Number of evictions in the Metropolitan Cities over 1,000 households in a rented dwelling. Source: Centro Einaudi, 2019: 97.

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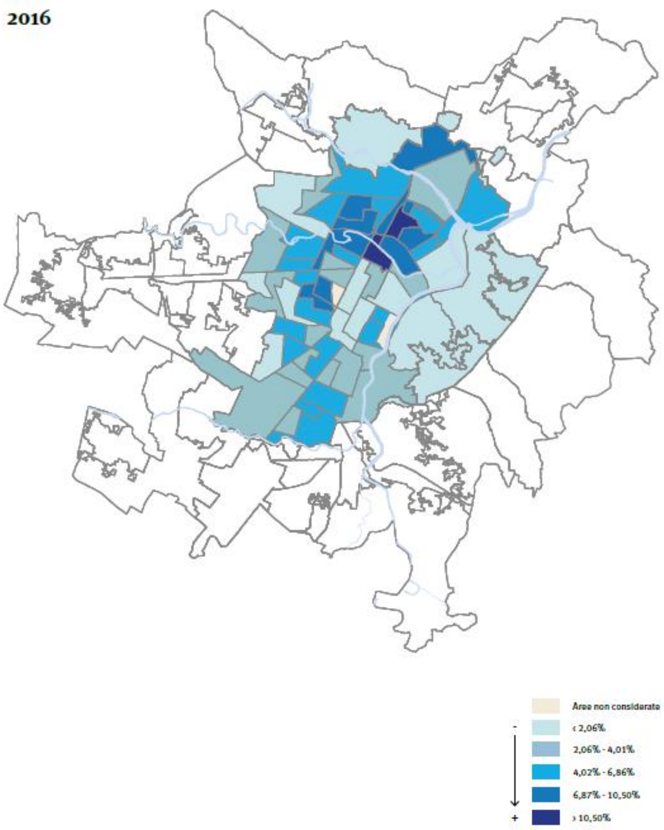

Figure 39: Eviction procedures per neighbourhood, percentage over the total amount of households renting a house/flat, year 2016. Source: Urban Center & Centro Einaudi, 2018: M7.6.

To manage this situation, the City of Turin has launched policy interventions to support more traditional initiatives on public housing. Those are: 1) the agency Lo.C.A.Re. (Locazioni Convenzionate, Assistite, Residenziali), launched by the City at the beginning of 2000s to support people experiencing housing exclusion in finding a house on the market; 2) a devoted fund named 'Fondo Inquilini Morosi Incolpevoli', aiming at helping people that are not able to pay the rent but who could not be considered guilty for that; and 3) social housing projects launched through the support of private investors, banking foundations, and the voluntary sector. Concluding, many social housing initiatives have been trying to address the condition of different socioeconomically marginalized groups. These projects have reached around 5,000 people over the years (Centro Einaudi, 2017), which is far below the real needs.

Workforce

In Turin, the current economic crisis is a result of many concurrent factors, such as structural problems at the national level, the aftermath of the global economic crisis, and a transformation of a former socioeconomic fabric almost exclusively based on the industrial sector that is still ongoing (Centro Einaudi, 2017).

The unemployment rate of the city makes Turin more in line with the trends registered in the metropolitan areas of the Southern Italy rather than the ones of the North. In 2015, 12.3% of men and 12.8% of women were unemployed (Centro Einaudi, 2017). Between 2004 and 2018, the unemployment rate increased by 49% (68% for men, 31% for women), while the national increment was ten points lower (Centro Einaudi, 2019b). Youth unemployment (15-24) is particularly high, as testified by a rate of 32,9% in 2018. Among Northern Italian metropolitan cities, Turin shows one of the worst performances, scoring slightly better than the sole Genoa (Centro Einaudi, 2019a).

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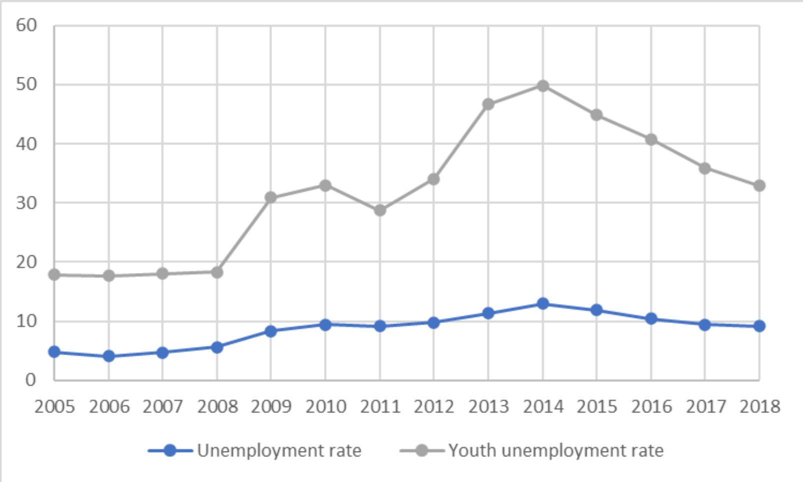

Figure 40: Unemployment rate in the Metropolitan City. Source: Istat, own elaboration.

If we look at the workforce composition, the industrial vocation of the city is still evident. Albeit a general trend of degrowth in industrial production, the sector has still more than a quarter of the employees, being – together with Bologna – the metropolitan city with one of the most productive industrial sectors (Centro Einaudi, 2019b). On the contrary, other sectors show negative trends. For example, in 2016 with regards to the retail sector and the hotel and catering sectors Turin was respectively 14th and 15th out of the 15 Italian metropolitan cities. However, Turin is in line with the national trend that sees a relevant decline in the share of employees in the industrial sector and a commensurate percentage increase in the hotel and catering sector, respectively around -30% and +45% from 2001-2016 (Centro Einaudi, 2019b).

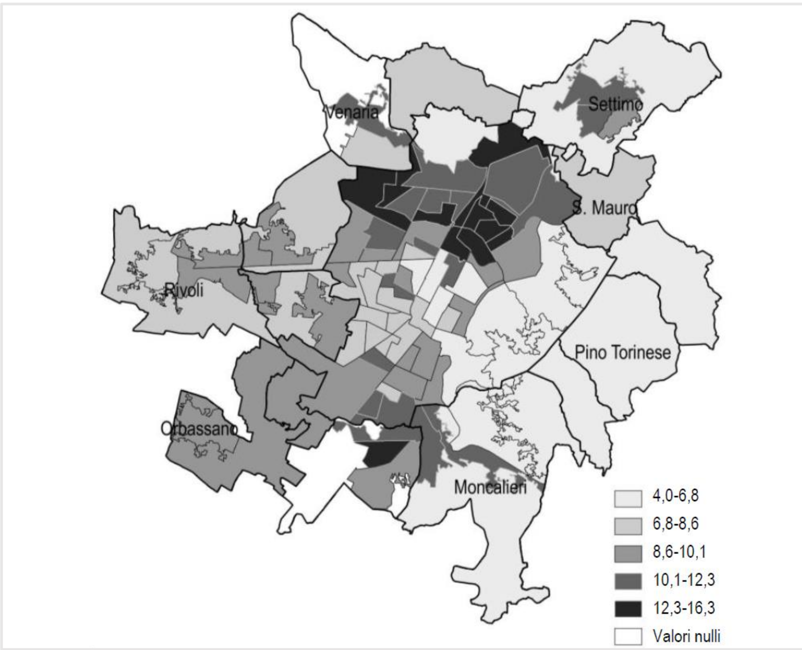

Figure 41: Unemployment rates per census area, elaboration on Istat data, year 2011. Source: Centro Einaudi 2017: 106.

Despite the growing attractiveness of both the University and the Polytechnic of Turin (see section 'Students') and the fact that the latter presents the lowest unemployment rates of new graduates among the Universities of the Italian metropolitan cities, Turin seems unable to retain qualified young people. In 2016, only 46% of people coming from other Regions who graduated in Turin found a job in the city (Centro Einaudi, 2017). Moreover, the share of people aged 30-34 who hold a degree was only 30.7% in 2011, positioning Turin well below cities renowned for their Higher Education offer such as Milan and Bologna (Centro Einaudi, 2017). In 2019, the share of people aged 25-30 who hold a degree places Turin at the fourth place in the rank of Italian metropolitan cities.

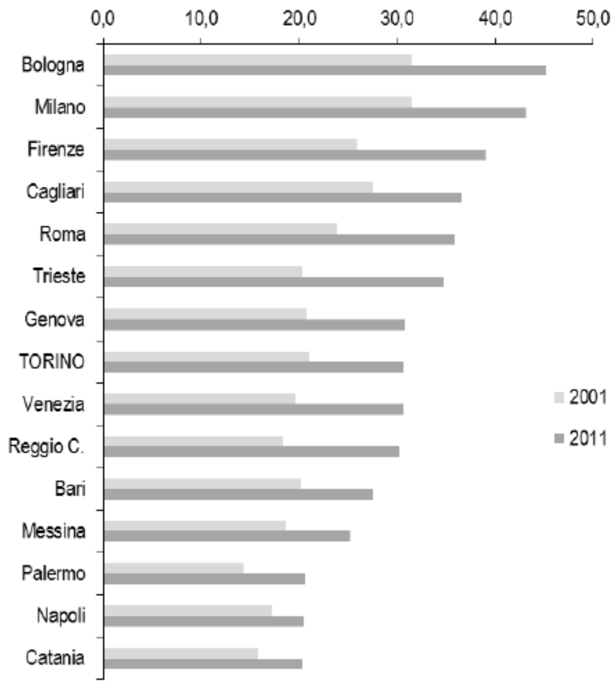

Figure 42: Graduates among people aged 30-34 in the Metropolitan Cities. Percentage values. Source: census data 2011 (Centro Einaudi, 2017: 144).

Welfare

Since 2000, a national reform has introduced important changes to the way social services and assistance are provided. Notably, law 328/2000 increased the role of municipalities in realising, managing, and organising the provision of social services, in compliance with the regional guidelines. Moreover, the law established that social assistance is provided by not only public actors but also other institutions and associations.

Compared to the other Italian Metropolitan Cities, Turin is a best-case example for what concerns social assistance. Historically, Turin's welfare system has been strongly characterised by crucial support of private forms of welfare provided by religious institutions, voluntaristic organizations and local foundations. Notably, the local bank foundation Compagnia di San Paolo has constantly increased the budget devoted to social assistance, together with the other Turin-based foundation, CRT (Cassa di Risparmio di Torino). In the last ten years, the budget that the two institutions have allocated to social assistance initiatives almost matched the total amount of money spent by the 86 bank foundations active at the national level (Centro Einaudi, 2017: 213). In general, the 'welfare mix' between public and private entities seems to be well implemented in the city. The bank foundations spend around 60 million euros per year in social assistance, an amount that substantially increases the 190 million spent by the City (Centro Einaudi, 2017). The great relevance that characterises these forms of private welfare, together with the huge public debt mentioned at the beginning, could explain the relatively scant increase in the City's public expenditure for welfare, which from 2005 to 2017 increased only by 8% (Centro Einaudi, 2019b).

After the 2008 economic crisis, the share of residents in need of some sort of assistance, either public or provided by third sector associations, has increased (Centro Einaudi, 2018). With

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regards to the geography of social exclusion in Turin, the areas most in need of assistance are historically the ones situated in the northern part of the city, especially the neighbourhoods Barriera di Milano and Aurora.

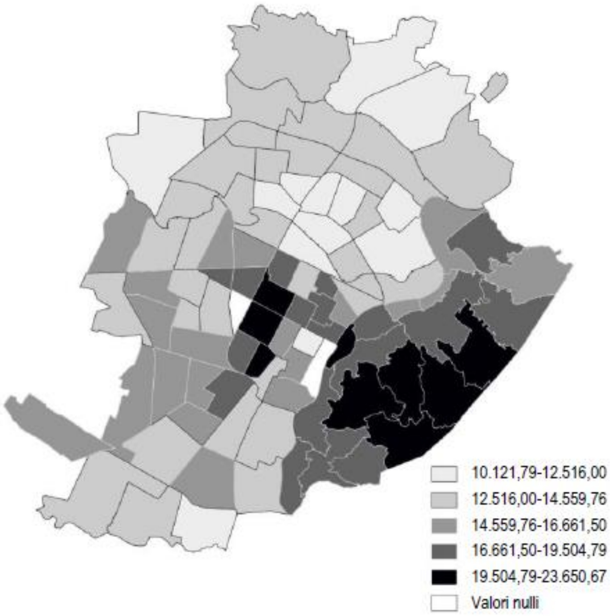

Figure 43: Average income per capita in statystical zones. Data from Agenzia delle Entrate, year 2009. Source: Centro Einaudi, 2017: 159.

As for other regions, the Covid-19 pandemic has made more evident the crisis of the welfare system and exacerbated already existing tensions and conflicts over some crucial city agendas. One key example in this respect – and of particular significance within the framework of SMARTDEST – is constituted by the long-lasting quarrel over the destiny of a former hospital, the Maria Adelaide, situated in the northern part of the city. The hospital was closed in 2016, provoking negative reactions not only among the residents but also among retailers of the area whose business was intimately linked to the presence of both the hospital staff and patients and their families.

One year later, the former hospital was used as a venue for an artistic exhibition. In 2019, the Region, owner of the building, announced the plan to sell the whole structure. This decision caused a first round of protests among residents, who were concerned about the increasing public disinvestment and privatization of the local welfare system. These protests were organised by community associations working in the area (Manituana, Comitato di Zona Aurora, Attac Torino), which managed also to discuss the issue with the Circoscrizione 7.

At the beginning of the Covid pandemic, the City Council approved a plan to ask the Region to re-open the hospital in order to face the emergency. The Maria Adelaide was identified, first, as a building to convert into a Covid-hospital and, then, as potential venue for homeless people particularly struggling with the pandemic and its management.

In September, informal groups of citizens, local neighbourhood associations and activists of the main squatted spaces of the area protested the decision and asked for the reopening of a crucial welfare infrastructure for the city. However, according to recent rumours, the Maria Adelaide could be converted into a student accommodation facility in the event of a successful outcome of the bid for hosting the Universiade 2025, the international sport mega-event for HE students (see next section).

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2 Regime change

2.1 Chronology

Although Turin has no cohesive and coherent urban growth strategy, most city stakeholders see the attraction of students in Higher Education (HE) as a solution to overcome social and economic difficulties. Indeed, many policy documents include references to that, either explicit or implicit ones. The first references to the University as crucial institution for relaunching the city stress their research activities, development work and capacity to support the economic sectors with knowledge and qualified employees. More recently, the focus seems to have shifted towards their urban externality and the relevance that students hold as temporary dwellers of the city and consumers.

First seeds. Universities and the urban knowledge economy

The first evidence of what has sometimes been called the 'Turin University City' strategy can be traced back to the first Strategic Plan. The role of the city's HE institutions was conceived as pillar of the knowledge economy. In particular, the plan recommends pursuing three objectives to guarantee Turin a competitive advantage over other cities at the global level: first, strengthening a high-level and internationally attractive HE infrastructure; second, supporting research in connection to the main economic activities; and third, fostering the professional education and the relationship between education and work.

In 2006, the second Strategic Plan maintained the knowledge economy framework and stressed the need to work on strengthening the city's human capital. Moreover, it also introduced a more general vision on the role of education *per se* and, crucially, highlighted the reference to the attractive capacity of the HE system. Notably, the plan identified the high level of the educational offer as key element for attracting talents from other regions and countries, adding an important caveat; 'it is evident that the attraction of talents is only the first step, since they must be hold through all the instruments provided by a vibrant scientific and cultural atmosphere and by a good accommodating capacity' (Torino Internazionale, 2006: 27). The proponents of the plan go a step forward, identifying the specific assets and the difficulties that Turin may encounter in the concrete implementation of this objective. 'Among the strengths of the Turinese area in this regard, there is the possibility to use part of the housing facilities that constitute the legacy of the Olympic Games , to guarantee a good quality hospitality to the newcomers; among the weaknesses, a cultural atmosphere not yet actually welcoming and tolerant towards lifestyles and visions different and far from ours; among the needs, the one of striving to increase the possibility for international students to enter work areas of excellence' (Torino Internazionale, 2006: 27).

In 2011, a document containing the main objectives and initiatives planned by the Fassino Administration for the period 2011-2016 frames the importance of HE for the city in multiple ways. Besides stressing the role of the two universities within the economic fabric of the region as engines of innovation, those institutions are also sees as drivers of internationalization and crucial actors in the various urban transformation projects that the City forecasts for the future. Notably, within the vision of 'a city in which housing policies, industrial and tertiary activities localization, university campuses, and green areas coexist within a *mixite urbaine* that fosters social cohesion, inclusion, territorial homogeneity', one of the main project consists in 'completing the urban university campuses: Italgas, Manifattura Tabacchi, Piazzale Aldo Moro, Città Politecnica, Città della Scienza e della Salute' (Città di Torino, 2011: 21). The 'university city' status is sometimes considered something that is already part of Turin, other times a project on which all the stakeholders have to work in order to give the city a 'new identity'. To succeed, many actions have to be implemented, such as: programme agreements with Università and Politecnico, housing help desk for students and residences, sports facilities, cultural initiatives for students, job placement, and incubators (see also Città di Torino, 2011: 24-25).

The project 'Turin University City'

In the following years, the City seems to focus more closely on the strategical dimension represented by the conversion of Turin into a University city. The first signal of this interest can be traced back to 2012. On May 8th 2012, a motion presented by the Head of Education and Youth Policy and the Council Head of Urban Development and Planning to the City Council asked to launch the project Turin University City. The proposal was justified by making reference to the increasing number of students, considered a success generated by the internationalization policies, the high quality of the two main Academic institutions, and the capacity of the Region, City and Universities to work together.

Interestingly, the reference of the Universities as R&D institutions that positively impact the local economy has almost disappeared. Its place has been taken by the acknowledgment of the need to convert the Universities into 'poles around which organizing opportunities and attractiveness' and a resulting claim that 'this ambition implies systemic choices in line with that: University campuses, accommodation services for the Academic community, adequate connections and public transports, also during the night, cultural and sport services' (Turin City Council, 8 May 2012).

On December 22nd, 2012, a second resolution was approved, marking an important step towards the ultimate definition mainly concerning the attraction of students and – most importantly – the provision of accommodation for them. The City Council´s resolution acknowledged the role played by the two main HE institutions. Both attract a growing number of students with internationalization initiatives and their high-quality education. It also explicitly linked the capacity of the city to attract students from other regions and from abroad to a broader project of urban transformations, identifying the integration of university functions with the whole urban fabric as a key priority and driver of change in the areas where the HE facilities are situated. In line with these considerations, the resolution was informed by an analysis in a report drafted by the local Urban Center. It analysed the potentialities of urban transformation and integration in areas located close to the university buildings (on the Urban Center document, see section 3).

These documents are the first explicit signals that the Turinese policy discourse and initiatives regarding HE strongly shifted towards student housing (see the next section), thus framing it in both ways - as an asset and as a potential problem to be tackled.

Students and the vision of an attractive city

From 2012 onward, the city addressed the issue from alternative entry points. Two memorandums of understandings were signed with the University of Turin and Polytechnic of Turin in November 2012 and other HE institutions in November 2013. Further initiatives have been implemented regarding the provision of student facilities, such as areas for sport and the

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study hall Murazzi Student Zone. However, all these initiatives were framed as part of a broader strategy towards the 'strengthening of the role of Turin in relation to other national and international competitors' in order to 'make the city more attractive for quality of life, spaces, facilities, and services for students and professors of universities and other HE institutions' (City Council resolution 4 February 2014: 3). The launching of the *Study in Torino* website and brand in 2014 is a precise evidence of this new trend. The initiative aimed at attracting students from abroad, advertising the many opportunities that the city offered, in consequence of the acknowledgement that 'nowadays more than in the past, young people chose where to study also on the basis of what a city is able to offer to them', as stated by the former University of Turin's Dean (Repubblica Torino, 25 October 2014). In order to foster the attractiveness of Turin to international students, the City asks the two main Universities to commit to 'build an exchange network for students and professors, also through the organization of Summer Schools and the support to associations of both foreign students in Turin and Turinese professors working abroad' (City Council resolution 27 November 2012: 2).

In line with the urban imaginary fostered by this discourse that framed the mission of the city in HE as part of a path towards the opening up of Turin to international networks, two other policy initiatives have recently been undertaken. In 2013, the city took a first step by approving the affiliation to the association *Unitown*. This international network, launched by the University of Ferrara, aims at fostering collaborations between universities in tackling the so-called town-gown relationship. The second step was taking in 2015 and aimed at setting up a strategy for the internationalization of Turin as a University city. The resolution contains a passage that is of particular interest for research on the topic informed by a mobility-based epistemology; 'The presence of students coming from other countries and who will be back in those countries after a significative period of stay makes those young people natural ambassadors of our city in their countries of origin. At the same time, Turinese students who move to study or are involved in international exchange may be employed as first promotors of Turin' (City Council resolution 8 April 2015: 2). International students are seen precisely as mobile dwellers who not only contribute to transforming the city during their stay, but also may take part in the city's strategies towards an increasing attractiveness and competitiveness at the international level.

Latest steps: built environment and students' agency

The initiatives introduced so far informed the third Strategic Plan, which had to provide a vision for a city that had to face multiple issues such as dealing with the aftermath of a global financial crisis, struggling with heavy financial debt from the Olympic Games and recovering from the collapse of the Fordist economy. The 2015 plan explicitly incorporated evidence coming from the initiatives on Turin University City popped up in the previous years, stressing considerations on the increasing number of students in the city.

On the one hand, the plan reiterated the need to attract more students; on the other (and somehow in a counterintuitive way), it interpreted the presence of more than 100,000 students as the proof of the excellence of Turin's HE system, which still had to work on the provision of appropriate facilities. Notably, the plan to transform Turin into a university city has been 'strongly supported by the City Administration, which has fostered the university campuses reorganization and an ambitious university residential system' (Torino Internazionale, 2015: 33). Moreover, a new understanding of the universities´ role in fostering economic growth in the

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city is evident. The main HE institutions are defined as important local actors, who need adequate physical resources. More in detail, Universities are considered: ‘actual economic activities […]; the main producers and attractors of the qualified human capital that to a large extent works in the local system and lives, consumes, exchanges, builds relationships and invests in the local context; crucial engines of internationalization […]; actors whose settlement patterns and, consequently, influence on the urban space are relevant, able to change the life of entire neighbourhoods (in the US, Universities are actual players in real estate market); local attractive factors in a more general and indirect way, for the human environment and the cultural dynamism that they contribute to generate for a city; crucial part for the city’s brand and image; subjects who engage with and create local communities, social cohesion, and widespread development’ (Torino Internazionale, 2015: 191).

The election of Chiara Appendino as Turin’s mayor in 2016 did not mark a significative discontinuity with regard to the City’s approach and interest towards the project Turin University City. However, the *Linee programmatiche 2016-2021* document (Città di Torino, 2016) contained an explicit reference to the willingness of the new City administration to involve university students in the project, who have been ignored so far. On the one hand, the Mayor and her collaborators commit to involving student associations in tackling the housing issue, on the other, the new administration unifies the responsibilities for youth policies, equal opportunities, and the Turin University City program under power of the same Council Member, to account for all these aspects when implementing policies.

More recently, another strategic document has been issued, the *Torino 2030* strategy discussed in the previous section. In this document, the overlapping of students and tourists is made explicit by combining the vision Turin University City and the strategy Touristic Turin under one umbrella called Dynamic Turin. In order to attract more students, the city aims at ‘providing the university population with a city that is attractive, dynamic, beautiful, green, and stimulating’ (Città di Torino, 2019: 34).

The issue of student accommodation and its entanglement with the branding strategies of the city are at the core of bid for hosting the Universiade 2025. The application for this big international student sport event sponsored by the main stakeholders of the Turin University City project. In the preliminary phases currently in progress, the eventual success of the bid will imply conspicuous investment for the construction of accommodation facilities that will eventually increase the offer of student accommodation facilities of the city; however, issues have been raising over the property – public or private – of these buildings.

3 Students and housing

3.1 Chronology of issue

In the international context of massification of higher education, the rise of mobility flows of students to Italian university towns and cities turned into an issue in the last decade. The attraction of higher education students becomes a policy priority of universities and their cities. Supported by spending review cuts and university system reform, nationally operated between 2008 and 2010, some universities mostly located in the northern Italian regions succeeded more than others in increasing their enrolment rates of off-site students. This is particularly true for

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Turin; where the student population started its constant and positive counter trend during the years of national decrease of students enrolment at university. Such an increase was led by relevant south-north youth migration fluxes (Fratesi, Percoco 2014; Vivio 2016) that almost doubled the number of off-site students living in Turin between 2010 and 2020. To date, around 38% of the Turin student population enrolled in HE institutions can be defined as off-site. This means that about 36,000 students are coming either from a different Italian region (33%) or from abroad (5%). These data can be translated in a huge (and increasing) housing demand making students a new central target for real estate investors.

Housing the student population: the policy approach

The intent of the municipality to make Turin a city fitted for student living, was first formalized in 2011 by the city government agenda (Città di Torino, 2011) and then clarified by the project "Torino Città Universitaria" which became the label that identifies all the policy initiatives in the field so far.

The project's first intention was to build a cross area working group involving different competences and City departments. This would have helped to coordinate specific sector-based policies related to the being a "University City" objective. Together with the municipality, the Higher Education Institutions, bank foundations, entrepreneurial bodies and students were intended to work together in order to plan and enhance the student housing supply and related facilities. In this context, the resolution launching the ambitious plans to realize the "Torino Città Universitaria" project has explicitly declared the need to develop public-private partnerships and attract private investments in the student housing sector due to a lack of public funds to achieve plan.

In 2016, the former vice-Mayor declared to a local newspaper that 'Turin needs student accommodations with tiered prices for the most capable and worthy, but also a high-quality accommodation system that encourages owners to offer more competitive rented places' (Repubblica Torino, 16 December 2018). In 2014, a city council resolution launched a call to investors for the construction of 5,000 new beds (which meant to double the current supply). The overall approach was (and still is) facilitating, instead of regulating, every private initiative coming through the different market proposals. This introduced new forms of housing in the municipal legislation that were previously not considered or even allowed.

The new municipal leadership in 2016 expressed the will to review the student accommodation policies in a public-led perspective. The new agenda aims to include mobile students as citizens whose right to access to the affordable (and legal) housing supply should be guaranteed by the local public administration (Città di Torino, 2016). The administrative activity related to student housing policies decreases significantly in the last five years. The only noteworthy act was the agreement between the municipality, the two main universities and the Regional Agency for the right to study (City Council, 2019). Signed in 2019, the document defined the mutual commitment in developing a public and fair platform to support students in finding a home. However, up to now, none of the actors involved decided to lead the activation process of the platform. On the opposite, the policy of development of Purpose Build Student Accommodation (PBSA), promoted by the previous city management, has continued and produced relevant results. While four new PBSA have been already completed and opened during the last seven years, seven other projects have been approved and are planned to be open within the 2023.

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These projects will increase the local supply of beds in student accommodation by 30%. Last June, the CEO of the Italian company Camplus, the main Italian student housing provider, stated that the current pandemic won´t affect their ambitious growth plans (Aspesi, 2020). The same intention was expressed by the international investors such as the Dutch company *Student Hotel* and confirmed by the progression of evictions deemed necessary for the building progress.

Managing Institution	*EDISU Public (Region)*	*Einaudi Private - Fundation*	*Camplus Private - Fundation*	*Sharing Private*	*CampusX Private*	*The Student Hotel Private*	*Other institutions Private/religious*	*Tot.*
Year of first opening	*1995*	*1935*	*2016*	*2015*	*2020*	*2023*	*1893*	*-*
N. available buildings	*15*	*4*	*8*	*1*	*0*	*0*	*26*	*57*
N. available beds	*2,173*	*663*	*490*	*536*	*0*	*0*	*1,255*	*5,117*
N. planned locations	*1*	*2*	*4*	*0*	*2*	*1*	*0*	*10*
N. planned beds	*80*	*190*	*More than 500*	*0*	*502*	*525*	*0*	*1,797*
Average prize of single room	*227 € (2,500 per 11 months)*	*636.36 € (7,000 per 11 months)*	*600 € (estimate)*	*460 €*	*620 € (estimate)*	*599 € (estimate)*	*398 €*	

Figure 44: Structure of the student residence network in the Turin metropolitan area – Pre Covid-19 situation. Source: Author's elaboration, 2020.

Public funded housing

Since Turin historically hosts two large and important universities, student accommodations are conventionally part of the urban fabric. Before what has been described as a "commodification turn of the student housing" (beginning around 2010), half of the supply was managed by small private and religious institutions, while the remaining half of beds were provided by the Regional Agency deputy to the right to study (EDISU). The latter, a public agency funded by the Piedmont Regional Council[4], is currently the main provider of student accommodation. It is also in charge study halls and canteens as well as assignment of scholarships to higher education students enrolled in regional higher education institutions. What distinguishes EDISU from other student facility providers is the target group, the students with the lowest family incomes. According to the student representatives, the efficiency of the EDISU can be a cause of student attraction. During the last twenty years the number of students who benefit from EDISU bed provision was stable around 2,100 students. Despite this, the demand remains much higher than the supply and there are still around 4,000 students fulfilling the requirements but do not get a bed (Ires, 2020). The shortage in public and economically accessible accommodations depends also on national and regional funding policies. Turin´s public accommodation system had its last opportunity to increase its housing stock during the Olympic legacy: the media Village and the

[4] In Italy every Region has its own Regional Agency, in charge for the assignment of nationally funded scholarships and for the provision of student accommodation and facilities.

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athlete's apartments of the 2006 winter Olympics are now student accommodations. On the other side of the coin stands the high cost of rent of these buildings. The debate about the same problem of costs of building not in the EDISU property is currently ongoing, in relation to the Universiade 2025.

Figure 45: Students public and private accommodation's spatial distribution and their dimension (n. of bed). Source: author's elaboration, 2020.

The widespread student accommodation

Around 14% of off-site students in Turin live in a student accommodation, a value not so distant from the European average of 18% according to Eurostudent (2018), while it appears above the national average, which is just about 3% of students. But most of the 36,000 off-site students in Turin (around 86% of the entire population) rent a flat, alone or - more commonly – shared with peers. The widespread student housing is a common trait in the Italian context and, according to the annual report of the Agenzia delle Entrate (2020), the number of student-dedicated leases shows a steady growth. In fact, student's demand also increases, despite a general trend in more expensive student rents, especially in most popular university cities such as Bologna, Florence, Milan and more recently Turin. The high vacancy rate in a shrinking city such as Turin, made – and still makes – it possible to transform family vacant apartments in student shared flats. This is a process still difficult to define because of the lack of studies and analysis.

From a first on field observation (made by the authors), preliminary considerations can be made on the ownership of students' flats in Turin. Most of them consist of inherited second houses, or small-scale family-based multi properties, while just a minority of properties seem to belong to real estate companies. A possible future investigation could test the hypothesis that student housing landlords in Turin share similar characteristics with the marginal Airbnb hosts described by Semi and Tonetta (2020). In particular, we refer to those 'house rich and cash poor' residents who decided to rent an apartment to raise income or to substitute lack of job opportunities in

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the traditional labour market. They tend to be the weaker players in the field of rent extraction (Semi & Tonetta, 2020: 10). Although the two authors refer to the tourist short-term rental sector in Turin, due to the similarities between tourists and students forms of temporary housing, it is possible to imagine a similar phenomenon – albeit its necessary distinctions – reproducing in the student housing sector too.

However, a specific trend in a thriving new form of business is emerging too. In 2015 the Turin City Council approved the student housing guidelines, which substantially recognize the opportunity to aggregate more than one apartment (even the entire building) in a same unit with a unique student housing function. Furthermore, landlords renting apartments to students can get a tax break or, in other words, a tax discount.

Recently, the work of Zasina (2019) gives the opportunity to observe student flats distribution around the city. As expected, higher concentrations emerge close to university facilities. At the same time, it is of more interest to see how student's apartments are widely spread even beyond the universities influence areas, but still in proximity to public transport connections.

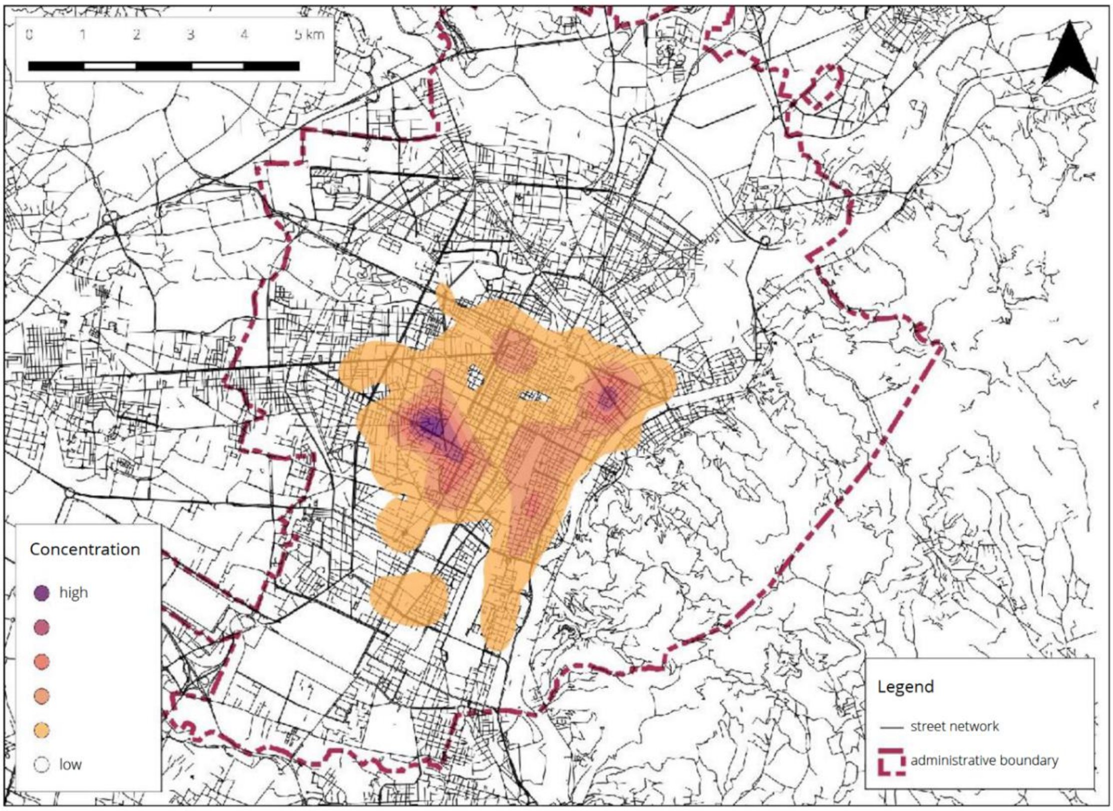

Figure 46: Student apartment's spatial distribution. Source: Zasina 2019.

Students impacts and conflictual relations

Student impacts on cities are widely associated with student spatial concentration and with the transformative power played by their particular form of housing in certain areas or neighbourhoods. There are several critical aspects concerning student housing and its conflictual relation with the social dimension of the city. In the widespread student housing dimension, students can be seen from multiple perspectives. The rapid increase in demand, the lack of regulative policies and the usually low student budget make them an easy target for the black real estate market, usually characterised by very bad living conditions. This is a phenomenon

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extensively denounced by student organizations and quoted even by the public administration (Turin City Council, 19 September 2019) that still has no adequate solution. Another reason that allows this form of exploitation possible is the scarce availability of flats. In fact, despite the estimated high vacancy rate, the local press narration as well as our on-field observation indicates a rising competition between different (mostly mobile) groups, fighting for an accommodation. Students seem to be the most desirable tenants. Differently from other groups, the majority of off-site students have their families' financial support, they can stay for shorter period of time and they are more flexible regarding the housing conditions. Furthermore, lease for students is the only typology who grants favourable economic income and at the same time tax reduction. However, as a young woman wrote on a Facebook page for housing in Turin - "once you are not a student anymore, you lost your right to have a home". Young workers and Italian families, even if they cannot compete with students, are however more welcome than migrants and foreign workers, which many housing advertisements in the city clearly indicate are not welcome at all (Corriere Torino, 6 November 2020). In other words, the more they need of financial (and social) support, the lower seems to be the interest of the administration in giving timely and concrete answers to their need.

These conflictual dynamics are apparently internal to the relations between the mobile urban groups and unfold a contradicting policy discourse on the attraction of some groups and the rejection of others.

Thus far, the administrative level of the city demonstrates to have reached a certain awareness on the student housing demand. If one cannot fail to affirm that there is in fact an extensive attention to the student housing issue, many criticisms emerge if we look at the approach used by the city administrations to deal with it.

During the last ten years many actions have been undertaken, as previously described; nevertheless, a lack of coordination between them emerge. Different council members acted, with different political perspectives, on the same topic at the same time. This was probably also due to a weak strategic approach; beyond the idea to build up new student residences, there wasn't (and still isn't) a clear and long-term strategy to do that, with the only except of the common awareness of the need to enhance the poor city financial conditions. In conclusion, it is possible to identify two main side effects of this un-coordinated approach. The first concern the point of view on the student population that has been affirming over the years: students are mainly seen just in light of the economic wealth they can bring to the city. The complexity and variety of the subjects that compose the population is missing in the policy discourse (i.e. the different income level that determine the kind of facilities some students can or cannot afford to access, the international students behaviors to meet and get together, the gender issue, to cite some). The second one is about the common attitude to ignore the urban transformations that such an approach can produce. Looking at the most common action undertaken, that is the license of PBSA development, the possible impacts on the physical surroundings of the area as well as on the neighborhood social and economic balance, are totally and systematically overlooked.

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4 Students-driven place transformations

4.1 Chronology of issue

The increasing presence of students enrolled in HE has contributed to significantly transform some areas of the city. These transformations are related, on the one hand, to the daily practices of students directly connected to their educational activities and, on the other, to their nightlife and leisure activities.

Building for a growing student population

In order to accommodate their expanding student population, both the University and the Polytechnic have engaged in real estate operations that have contributed to changing the face of conspicuous parts of the city. As made evident in the two previous sections, the two main Turin's HE institutions have recently become highly active players in urban transformations. According to the latest available data, their spatial reorganization has significantly contributed to the process of urban transformation in the city. Over 380 million euros have been invested since the beginning of 2000s in total of 200,000 sqm of space that is devoted to teaching activities and other university services (Urban Center Metropolitano, 2016). Both institutions implement their real estate strategies through instruments such as the *Masterplan of Polytechnic* (De Rossi et al., 2016) and the *Rapporto di sostenibilità of the University* (Università di Torino, 2018), which provide a strategic framework for their real estate operations.

Recently, the University inaugurated the Palazzina Aldo Moro in the city centre, a multifunctional building that aims at representing the concept of an 'urban campus', that is, not a secluded space but a building that is functionally and physically enmeshed with the surrounding urban environment. The opening of two multinational fast-food restaurants has sparked student protests that blamed the University for the privatization of its buildings. According to the plans, the Palazzina will also host classrooms, University offices, a kindergarten, a gym, and a students' residence.

In 2012, the University inaugurated a new campus that could be considered the most important concluded urban intervention taken by an HE institution due to its strong transformative effects on the area. The Campus Luigi Einaudi is situated in the Northern part of the city, close to the river Dora, in a former industrial area that connects the Aurora neighbourhood with the Vanchiglia neighbourhood. The building hosts the Social Science, Politics, Economy and Statistics, and Law Faculties of the University of Turin, together with an 800-seats library. Since its opening, the Campus has significantly affected the area, transforming Vanchiglia into a neighbourhood with highly perceived students' presence (Dansero, 2014).

Some other flagship projects are on the agenda for the imminent future: the Città della Scienza (City of Science) in Grugliasco, a municipality of the metropolitan area, which aims at concentrating all the Sciences Departments in one single hub; the Parco della Salute (Health Park) in the southern part of Turin aiming to concentre hospitals and university facilities; the Competence Center for the Industry 4.0, located in a former industrial area and planned by the two Universities.

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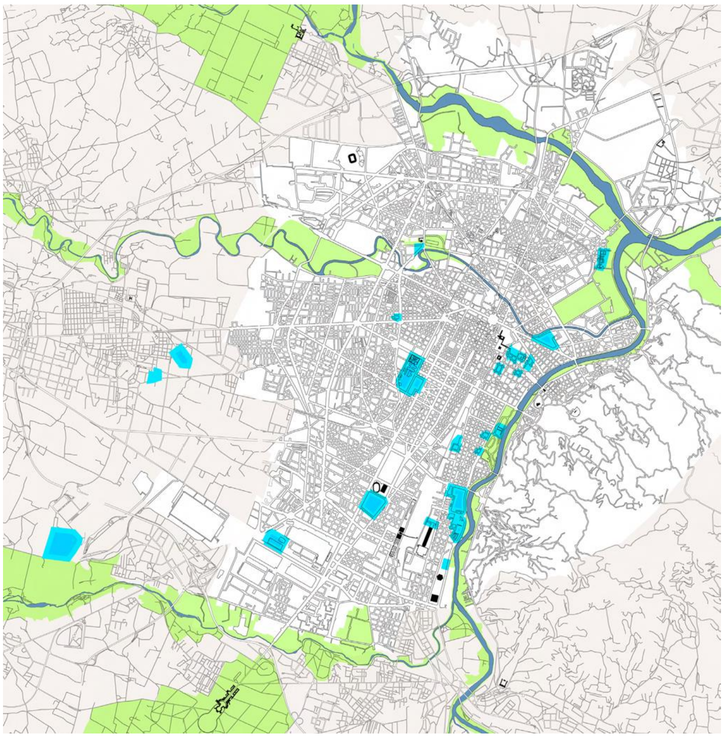

Figure 47: Higher Education buildings in Blue. Source: Urban Center, 2012.

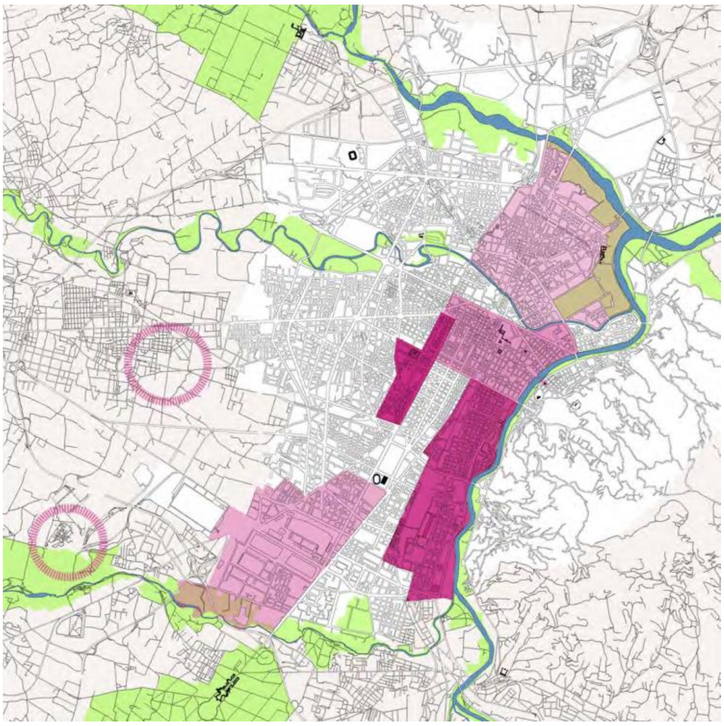

Figure 48: The seven districts of Turin University City. Source: Urban Center, 2012.

Geographies of students’ leisure consumption

According to Zasina (2020), students’ leisure practices are variously spread over the city. For all the main leisure activities considered (i.e. visiting music and night clubs, pubs and cafés, cultural venues, sport venues, and doing non-daily shopping), students’ preference seems to go to those areas of the city typically devoted to leisure practices, namely the city centre. However, the same research highlights that, on the one hand, students spend a large part of their free time at other students´ homes and, on the other, in pubs and cafés close to their own living spaces.

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This last consideration highlights the relationship between a high students' presence in a neighbourhood, new consumption practices and habits, and the transformations experienced by the retail landscape. Indeed, few works have recently started shedding light on Turin's examples of what is largely known in the academic literature as 'studentification'.

The most evident example is constituted by the urban transformations that the neighbourhood Vanchiglia has been undergoing since the opening of the Campus Luigi Einaudi in 2012. After the campus was built, the neighbourhood became extremely popular among students, due to its strategic position between the university and the city centre. This brought with it some of the economic, physical, social, and cultural transformations that are usually associated with studentification processes. Notably, the neighbourhood is one of the places in the city in where food-gentrification is more evident. A particular landscape of consumption has emerged that caters for a specific population. Vanchiglia has become an increasingly appreciated nightlife venue together with a small square in front of the Campus. The latter was the reason for resident protests. Moreover, the progressive change in the image of Vanchiglia led to the upscaling of its touristic appeal, thus leading to the growth of Airbnb listings available in the area. This collateral effect has created an unexpected and somehow paradoxical situation. Tourists and students, two mobile groups at the core of the city agenda, are pitted against each other for access to adequate accommodation (Giardina, 2020). However, recent research has highlighted that the studentification concept as it was developed in the UK context could be a problematic and partially misleading analytical lens for the study of current transformations in Vanchiglia (Vigarani, unpublished work).

Analogous processes affect the neighbourhood San Salvario, albeit this one represents more generally one of the most famous Turinese examples of gentrification (for a detailed discussion see Bolzoni, 2016). Still, the neighbourhood is one of the most attractive venues for students, due to its strategic position between parts of the scientific Faculties of the University and the Faculty of Architecture and its proximity to the Valentino park. The park was characterised by its club scene until some years ago and is especially renown to Erasmus students.

Both San Salvario and Vanchiglia are important examples of neighbourhoods where increasing students' presence drives exclusion of long-term residents. These effects are various; from the contraction of long-term rentals supply to the conversion of retail landscape into one specialized on students' consumption habits, from noise during night-time and a general worsening of place qualities to the presence of drug dealing activities.

Despite not making the headlines, Borgo San Paolo too is one important site for Turin's geographies of urban transformations related to the presence of HE students. The neighbourhood is populated by students both because of the closeness to the Polytechnic's headquarter and because a new students' residence was recently built in the area.

Future plans for the opening of private student accommodation facilities and a requalification agenda aiming at radically transforming the area North of the Dora river, have led local communities to express concern over the potential effects on the real estate market and the services available in Aurora, one of Turin´s most deprived neighbourhoods. Due to the presence of the Campus Luigi Einaudi, part of the area has been already undergoing transformation with regards to the housing market and the consumption landscape, becoming increasingly populated by bars, nightclubs, and hipster eateries.

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Lastly, in the city centre the massive presence of students is evident, both during the day, as many University buildings are located in the area, and at night, when the bars, clubs, and cafés of the main squares and streets get crowded.

5 Key stakeholders (already contacted)

stakeholder name	type of contact	stakeholder type	form of involvement	description of interaction	other comments
Marco Giusta	Mail and telephone	Municipality	Interview and data sharing	Formal	
Federica Laudisa	Mail	Osservatorio Regionale Diritto allo Studio	Interview and data sharing	Formal	
Silvia Bodoardo	Mail	EDISU Vicepresident	Interview	Formal	
Chiara Lucchini	Mail	Urban Center	Interview and data sharing	Formal	
Antonio Amico	Mail	Students' representative in EDISU	Interview	Formal	
Alessandra Quarta	Telephone	Representative of the Dean for University and urban regeneration - Unito	Interview	Informal	
Egidio Dansero	Telephone	Vicedean for sustainability and relationship between University and city - Unito	Interview	Informal	
Elisa Gallo	Mail	Stessopiano	Interview and data sharing	Formal	TBC
Tiziana Maccario	Mail	Unito - Internationalization	Interview and data sharing	Formal	TBC
Elisa Armando	Mail	Polito - Internationalization	Interview and data sharing	Formal	TBC
Mahee Ferlini	Mail	Polito - Enrollment	Data sharing	Formal	TBC
Massimo Bruno	Mail	Unito - Enrollment	Data sharing	Formal	TBC
Massimo Rebuglio	Mail	Polito - Students' association	Interview	Informal	TBC
Giorgia Garabello	Mail	Unito – Students' association	Interview	Informal	TBC
Elisa Armando	Mail	Polito - Internationalization	Interview and data sharing	Formal	
Tiziana Maccario	Mail	Unito - Internationalization	Interview and data sharing	Formal	TBC
Luna Sette	Mail	Stesso Piano – Student Accomodation	Interview	Formal	

6 Coping strategies

As shown in the previous sections, student-related mobilities could be drivers of various forms of exclusion which in turn configure various excluded subjects, either residents or students themselves.

With regards to the effects caused by growing students' presence in some neighbourhoods, residents have sometimes complained about the negative consequences of student nightlife and even coalesced in informal associations of residents and retailers. An example is one movement created in Vanchiglia to tackle the problems related to the so-called *mala-movida*, that is, nightlife behaviours that disturb the life of residents.

However, the most debated issue is related to urban transformations around student accommodations. Protests have raised from various sides against the growing privatization of large parts of the city to convert former industrial areas and other abandoned buildings into private student accommodation facilities. In particular, the project of opening a branch of *The Student Hotel* in the neighbourhood Aurora has met the protests of local *comitati* (i.e. citizens' associations) and cultural centres. Notably, the *Comitato Aurora* and the cultural centre *Il Fuoriluogo* have been evicted from the area to make space for the *The Student Hotel*, despite their activities in the neighbourhood as providers of social services and organizer of cultural and political events.

Other similar projects that the city administration put on the agenda, have provoked demonstrations of student associations. They were concerned of the discursive exploitation of their needs to justify what they label as mere real estate operations needed by a still highly indebted city and the lack of a corresponding zeal in increasing the offer of public accommodation for low-income students.

Similar concerns surround the news of the potential conversion of the Maria Adelaide Hospital into a student accommodation facility in case the city wins the bid for the Universiade 2025.

To sum up, it is possible to say that the current policy framework under the label 'Turin University City' has mainly framed student mobilities as an issue of accommodation. This understanding configures the exclusionary effects related to students as principally emerging in relation to either the housing sector and real estate operations or the built environment.

7 Covid-19 and (eventual) post-Covid

The Covid pandemic has clearly shown the risks of an urban economy that has become too much reliant on the presence of students in the city, especially for what concerns the socioeconomic fabric of some neighbourhoods. As soon as the virus spread, Turin assisted to the rush of many off-campus students toward their previous living place, worried of being forced to remain separated from their families for a long time. This was especially true for Erasmus students, who were threatened by the risk (then become reality) of being stuck in Italy because of the airports closure. Currently, the Erasmus students in Turin are only 350, while in the same months of 2019 they were around 1,000 (La Stampa – Torino, 7 November 2020). Moreover, according to recent research, the economic effects of Covid-19 on households' income could exert a further negative impact, preventing some to even enrol in university (Laudisa & Musto, forthcoming).

The effects of Covid-19 on student mobilities in Turin were immediately evident in the figures on population. Since the start of the sanitary emergency, the city lost 3,781 residents, but the figures regarding the outflow of students were even worse. Regarding only to the situation of the Polytechnic, almost 27,000 students participated in online classes; 8,241 of those students were physically located in other regions (Corriere Torino, 9 November 2020).

During the Summer, the City and EDISU accelerated an already existing initiative in the framework of Turin University City, namely 'Campus diffuso' (scattered campus). To tackle the lack of facilities – closed because they could not comply with the sanitary standards –, outdoor study halls were opened in meeting places, such as parks and cultural associations (La Stampa – Torino, 6 August 2020).

More in general, two major consequences of the pandemic have been identified: first, the impact on some retail sectors concentrated in students' neighbourhoods; second the effects on housing. About the former, many retailers who own a business close to an HE branch such as bookshops, bars or copy shops lamented that the lack of students going to classes provoked consistent loss of profit (Repubblica – Torino, 27 May 2020). Those neighbourhoods most popular for their nightlife, especially San Salvario, have been experiencing the effects of a retail landscape that is almost exclusively made of nightclubs, bars, and cafés, which have become empty after Covid spread (Corriere Torino, 9 November 2020).

About the latter, according to the FIAIP (a trade association for real estate agents), students' rents bring almost 150 million euros each year into the city (Torino Oggi, 2 June 2020). According to a recent survey conducted by the Italian most used platform of real estate ads, the availability of free rooms has increased 108% in Turin[5]. Before the start of the current academic year, an association of small owners confirmed the trend, claiming that only 10% of the total contracts stipulated with students in 2019 has been signed (Repubblica – Torino, 25 August 2020).

The issue intertwines with the impact of platform-mediated short-term rentals for tourists (Corriere Torino, 27 November 2020). To overcome both situations, a city council member formally suggested to convert empty Airbnb apartments into dwellings rented to students and people in need, but the petition was then withdrawn due to the uncooperative attitude of Airbnb owners.

The issue of EDISU residences deserves to be mentioned separately. On the one hand, many students decided to leave their accommodations threatening the consequences of being forced to be lock in small rooms and use shared spaces (Corriere Torino, 5 November 2020); on the other, the economic effects of Covid caused an increase in the applications for a room in the EDISU residences (Repubblica – Torino, 10 September 2020).

[5] https://www.mutuionline.it/news/mutuionline-informa/studenti-fuori-sede-il-coronavirus-svuota-le-stanze-nelle-citta-universitarie-00030737.asp

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Conclusions

Two main topics could be explored as examples of social exclusion driven by student-related mobilities. The first consists in the effects of place-transformation that the increasing presence of HE students exerts on some neighbourhoods, with regards to the retail landscape, the services available to the population, the nightlife, and the housing sector. Here, students are predominantly framed in a negative way provoking the exclusion of long-term residents from conducting their daily lives and dwelling in the neighbourhood. The second is a more nuanced understanding of the relationship between the mobilities related to non-residents and their place-specific exclusionary effects. In this scenario, students play (also) the role of excluded subjects, as the urban regime that aims at attracting them exploits their mobile presence in the city mainly to pursue their own growth agenda highly based on real estate speculation.

In addition, a further paradoxical element could be identified in this articulated perspective. Students (both residents and non-residents) are usually on the front line in opposing urban transformation projects that foster real estate operations privatizing large parts of the city by mobilizing the idea of 'Turin University city'.

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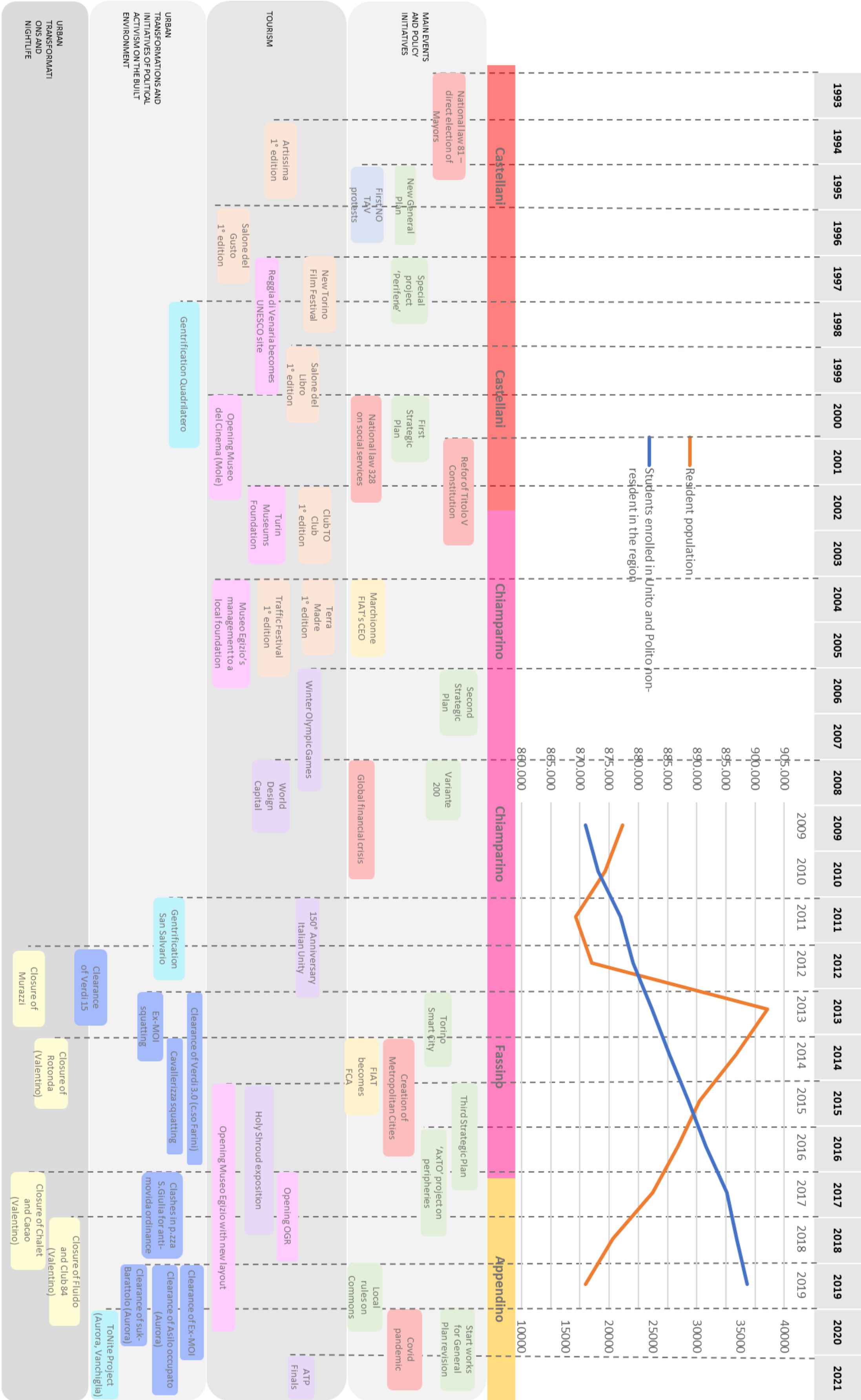
Appendix

Timeline Turin: 1990-2020 PreCOVID



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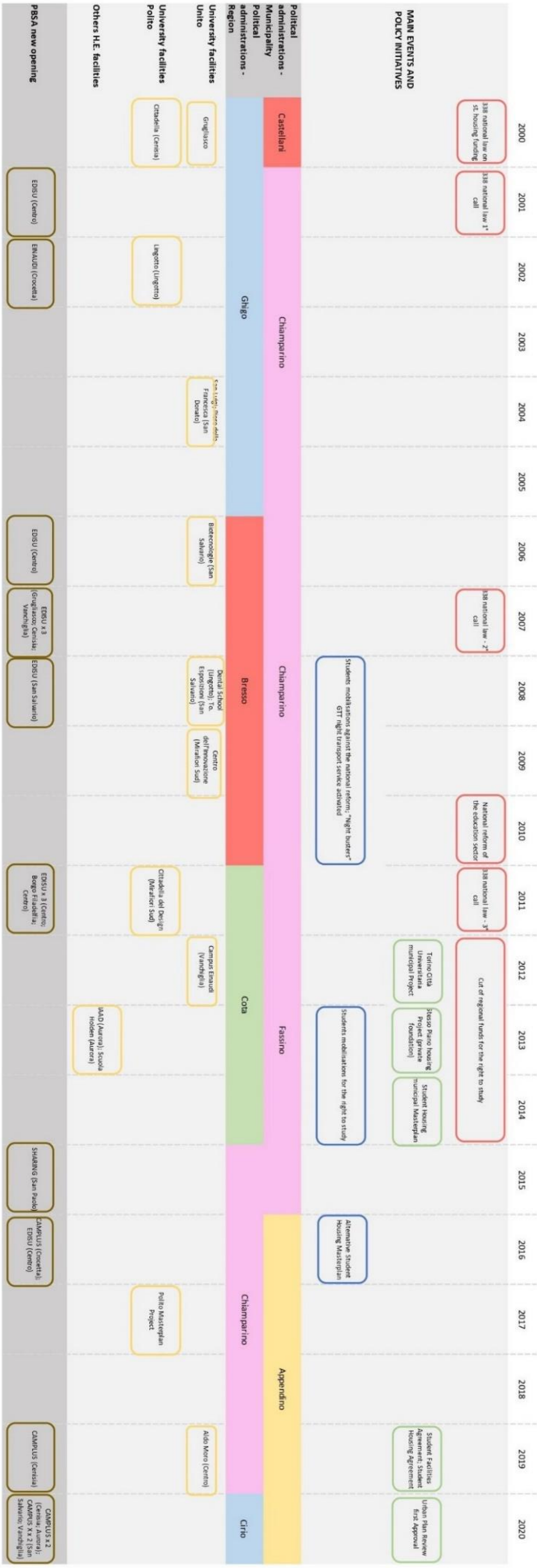

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