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The “Souths” of the “West’s”. Southern critique and comparative housing studies in Southern Europe and USA

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Abstract

Southern urban critique has enriched our understanding of global uneven development, but often ended up constructing a dichotomous understanding of two apparently homogeneous fields: the Global North (or West) and South. This has been particularly evident in housing studies. In this article, I advocate for a relational, multi-scalar and comparative approach to southern urban critique, capable of exposing quasi-colonial

relations *within* the urban “West”; and apply it to the exploration of housing dynamics and systems in Southern Europe and Southern USA—two regions linked to their continental “cores” by historical patterns of uneven and combined development. Despite being characterized by different urban frameworks and housing systems, these regions have in common analogous patterns of globalization and neoliberalization, with similar impacts over housing, especially in the aftermaths of the global economic crisis. By discussing how global trends intersect with regional contexts, I aim to provide conceptual and epistemological instruments for deepening the analytical grasp and political relevance of southern (urban) critique.

Keywords

Postcolonial urban studies; gentrification; comparative housing; housing systems; housing policy; uneven and combined development.

Introduction

Urban studies and, to a smaller extent, housing studies have been (re-)shaped by postcolonial, decolonial and subaltern epistemological and ontological approaches (which, for lack of a better term, I will hereafter collectively refer as southern urban critique).¹ Southern critique has enriched our understanding of uneven development at

¹ My use of “southern” does not imply that all, or even most, post-, decolonial and subaltern urban critique comes “from” the Global South. Rather, my use of southern refers to, first, empirical attention to southern cities and, second, the epistemological critique of the universalization of northern theories (see next section).

the global scale, but often ended up reifying historical “abyssal lines” (Santos, 2007) between apparently homogeneous fields: the “Global North” and the “Global South”. In this article, I advocate for a multi-scalar, relational and comparative approach to southern urban critique, capable of exposing uneven relations *within* the “West”, and apply it to the exploration of housing dynamics and systems in Southern Europe and Southern USA.²

Not only are these regions the geographical “Souths” of Europe and North America, “transition zones” with the Global South (Chiodelli, 2019, p. 497); but they are

² In line with a consolidated tradition in comparative housing studies (above all, Allen et al., 2004), I define Southern Europe as Portugal, Spain, Italy and Greece—excluding the Balkan states which have distinct socio-political, urbanization and welfare trajectories. Many of the considerations done for these countries could be extended to Cyprus, because of its similar position in the global division of labor and a number of similar characters in terms of housing system—e.g. trends of rent regulation (Kettunen and Ruonavaara, 2020, p. 8), rates of mortgaged homeowners (Stephens et al., 2015, p. 1221) or policies for attracting foreign real estate investment (Rogers & Koh, 2017). However, comparative housing and urban studies have engaged with Cyprus virtually only in large panel data studies, without inquiring in-depth the dynamics addressed in this article, making it impossible its inclusion in a study based on critical review of literature.

All definitions of Southern USA include the confederate states, with some including other states where slavery remained legal until 1860. Since extensive definitions include cities commonly included in other regional frameworks—the East Coast (Washington DC, Baltimore, Newark) and Midwest (St. Louis)—I limit my definition to former confederate states: Virginia, Georgia, North Carolina, South Carolina, Tennessee, Alabama, Mississippi, Arkansas, Florida, Texas and Louisiana. I will occasionally mention the Sunbelt, which spans from the South to the South-West (New Mexico, Arizona, Nevada and California).

historically linked to their continental cores by uneven development and quasi-colonial relations, their societies having been racialized and labeled “underdeveloped”, “backward”, “dumb”, “immoral”: indeed, “Third-World-like” (see below). And yet, southern perspectives have only recently been adopted in urban studies—especially in the aftermath of the global economic crisis—and virtually never in housing studies to unravel these relations. This is even more surprising given that Southern Europe is the birthplace of Gramsci, whose theorizations of uneven and combined development have been crucial for post- and decolonial theory writ large (see Hall, 1986; Morton, 2007).

I will show how a relational, multi-scalar and comparative approach to southern urban critique can expose the relations of uneven and combined development at the core of the dynamics of urban development and housing in Southern Europe and Southern USA. Additionally, this approach is a contribution to overcoming culturalist explanations often deployed to explain the “underdevelopment” of these regions—explanations that have been criticized in academic circles (see below) but have remained powerful in the political imagination and public debate (see Tulumello, 2020; Bialasiewicz, 2021).

I will focus on how contexts characterized by different historical trajectories, urban fabrics and institutional arrangements have been impacted by the same transnational forces in the wake of the global financial and economic crisis. Inspired by global urban studies (J. Robinson, 2016), I will draft a framework for, and sketch broad lines of, a comparison between recent housing dynamics in Southern Europe and Southern USA, two cases complementary and, at the same time, analogous—i.e., comparable in respect to dimensions that help make clearer the nature of the things compared. Southern Europe and USA are cases of “maximum variation” (Flyvbjerg, 2006) for their different patterns of urbanization and housing systems. At the same time, they share analogous historical

trends of uneven development and have been experiencing with similar challenges in the fields of urbanization and housing, from globalization and neoliberalization.

I have two broad goals: epistemological, enriching southern urban critique through relational, multi-scalar and comparative approaches to foster more nuanced understandings of the vertical and horizontal relations central to present housing dynamics; and, theoretical, further contributing to de-parochializing housing studies by exposing regional differences and uneven and combined developmental relations *within* the Global North.

This article is based on a critical review of discussions of regional urban and housing frameworks, as well as recent attempts at adopting a “southern” grammar in the European South and, to a lesser extent, the US South. I broadly build on findings from previous researches, above all the comparison of urban security policies in Lisbon and Memphis (Tulumello, 2018), critique of culturalist explanations of “underdevelopment” in Southern Italy (Tulumello, 2016), and discussions of uneven developmental relations in Southern European housing and urban dynamics (especially Tulumello & Picone, 2016; Allegra et al., 2020; Tulumello, Cotella & Othengrafen, 2020; Tulumello & Allegretti, 2021; Tulumello & Dagkouli-Kyriakoglou, 2021).

My argument proceeds in five sections. First, I develop the epistemological and conceptual approach by taking steps from Marcelo Lopes de Souza’s remarks (2019) on postcolonial urban studies. Second, I present the case studies, reviewing traditional culturalist explanations of their “backwardness” and recent works that have problematized this tradition. Third, I set out a relational and multi-scalar comparative framework among the urban Souths of the West. Fourth, I discuss comparatively recent, analogous housing dynamics in light of the context of different regional and national housing systems. Finally, I summarize how the comparative exercise helped expose the

relations of uneven and combined development that shape housing and urban dynamics in the Souths of Europe and the USA; and reflect on the implications for southern urban critique more generally.

Toward a multi-scalar southern urban critique

Reviewing the full scope of discussions inspired by southern urban critique is beyond the scope of this article. In summary, two broad ideas have emerged: Calls for global urban sociology (Garrido et al., 2021) or “southeastern” perspectives (Yiftachel, 2020) have emphasized the importance to enrich urban studies through research in places other than North America and Europe; concepts like subaltern urbanism (Roy, 2011) or peripheral urbanism (Caldeira, 2017) have advocated theorizing from forms of urban development different than what is traditionally understood to be “planned” development in the Global North. In short, southern urban critique has brought to the limelight places of, and theories from, the Global South broadly understood. Lawhon and Truelove (2020) have summarized southern urban critique’s three main epistemological claims: i) The South is empirically different; ii) the South has different intellectual and vernacular traditions; and iii) postcolonial relations require us to examine the production of knowledge. Lawhon and Truelove move on to seek the limits of southern critique:

We agree with others more widely that “the global south” is best understood as a time-limited concept-metaphor which has particular resonance in our contemporary world, but one that we anticipate eventually becoming less salient for our understanding of the world. We are simultaneously of the position that the concept metaphor of the south is, at present, of tactical *analytical* and *political* utility in the project of change knowledge production (idem, p. 16; emphasis in the original).

Let me qualify this argument. I agree that the idea of Global South as a geographically bounded region is becoming less analytically salient. However, the “concept metaphor” of the “south” will remain crucial to understand socio-spatial and political economic relations *at several scales* as long as the world will be shaped by a system, capitalism, whose reproduction is based on uneven and combined spatialized relations.

In order to make this argument, let us take step from Souza’s critique (2019) of postcolonial thinking—a critique from and on the Global South. By focusing on the production of academic knowledge, Souza warns that the critique of Eurocentrism often becomes an ideological comfort zone useful to cover up structural differentiations and ethnocentrism *within* postcolonial societies. Souza therefore argues against the idea of geographically stable, global “abyssal lines” (see Santos, 2007) between internally homogeneous world regions (Souza, 2019, p. 14):

The “Global North”/“Global South” divide corresponds to an oversimplification that masks important differences especially across the “South”. To which extent belong white (and especially male), middle-class academics from some semiperipheral countries—I am thinking especially on South Africa, but it could also be Brazil, Argentina, and so on—to a typical “Global South” framework?

Dichotomic thinking masks differences well beyond the Global South: Similar critiques have been put forward by Southern European scholars, for instance Francesco Chiodelli in his studies (e.g., 2019) on housing informality or Thomas Maloutas in his reappraisal (2018) of the global reach of gentrification. Maloutas problematized literature on the limits of gentrification in the Global South (e.g. Ghertner, 2015):

Several authors use the crude duality “metropolis of the Global North versus metropolis of the Global South” to indicate contextual difference. In so doing, they seldom explore it operationally in terms of the distinctive features of the two groups of cities and, especially, the ways these features may differently affect gentrification processes (Maloutas, 2018, pp. 257).

This is particularly relevant, Maloutas argues, with regard to the European South, a context where gentrification has long been inadequate to explain urban change (see below). Nick Dines concludes that “the dominant postcolonial perspective offers more of an obstacle than a stimulus for interrogating the particularity of [Southern European] urban processes and outcomes” (2016, § 12). Not going so far, I will rather argue that a relational, multi-scalar and comparative use of southern critique is crucial to understand urban development and housing dynamics in the Souths of Europe and USA.

My approach is inspired by Souza’s argument for a spatialized approach:

There is one crucial sense in which it is right to speak of “centre” and “periphery”: *namely in the sense that power asymmetries reflect themselves on space and manifest themselves through space (and are also exerted by means of spatial practices)*. And that is true in regard to several scale levels, from local to global. At all levels one can find a “centre” and a “periphery” in this sense—in the sense of *spatialised heteronomy* (2019, p. 18; emphases in the original).

This approach is *relational* because it analyses coloniality and uneven development as the geographically variegated and historically dynamic drivers and expressions of specific relations of power. At the same time, in line with Souza, these relations need to be conceptualized as being inherently *multi-scalar*: The same territory or space can be seen

to remain on different sides of the structural relation depending on the scale of analysis. An obvious example of the historical dimension are the USA, which were born as a colony and afterward became a global imperial power. A more complex example is Southern Europe, which has, on the one hand, been long inquired for its role in the history of colonization on a world scale (both as part of continental Europe and because of the specific, and different, trajectories of Portuguese, Spanish and Italian colonization). On the other hand, it is possible to inquiry the relations of uneven and combined development that have shaped European history internally, ultimately including Southern Europe on a subaltern position (see below). Crucially, as argued by Charnock and colleagues (2014, pp. 40-44) for the case of Spain, the two dimensions are interlocked: The rentier form taken by Spanish capitalism during the colonial era is one of the explanations of its “backwardness” *vis-à-vis* forms of industrial capitalism that have emerged in the “core” of Europe—an argument that can be applied to Portugal and, to a lesser extent, Italy. Similarly, these patterns are reproduced at smaller scales inside the European South: As long argued by Gramsci and Gramscian scholars, this is the case of the Italian duality, whereby the “underdevelopment” of the *Mezzogiorno* has been historically determinant to the emergence of the Italian North as one of the wealthiest European regions and to Italian development writ large (see Arrighi & Piselli, 1987; Hadjimichalis, 1987; Schneider, 1998).

A relational and multi-scalar approach can, in summary, help us problematizing the rigid dichotomy “Global North/Global South” that has often loomed over southern urban critique. My epistemological strategy is the adoption of a *comparative* framework inspired by Jennifer Robinson’s “generative” tactic, “in which a virtual field of conceptualization can be provoked and enriched through bringing different singularities, or cases, into conversation” (2016, p. 18). Operationally, the singularities to be studied

are the characters of uneven and combined development that contribute to shaping housing dynamics in Southern Europe and Southern USA, which I will put in conversation on the basis of their analogous conditions (see next section).

In other words, I will compare the trajectories of two “peripheries” within the “center” (the Global North): the “Souths of the Wests”. The rationale for this terminological twist is twofold: On the one hand, the shift from North to West displaces the symmetrical relation implicit in North vs. South (cf. Romine & Graeson, 2016; Chiodelli, 2019); and, on the other, referring to a plurality contributes to overcoming the understanding of a spatially stable, historically given dichotomy between *one* North/West and *one* South.

Why Southern Europe and USA?

Not in geographically deterministic fashion I call these regions the Souths of the Wests. Sure, they are located at the southernmost edge of their continents and are “geographical fringe areas” (Chiodelli, 2019) with, respectively, Africa and the Middle East, and Latin America—think of the role of the Mediterranean in mediating Europe/African relations or the strategic location of Memphis, home of the second world’s busiest cargo airport, for the Latin American operations of logistic giant FedEx. And yet, other transition zones, other “Souths” exist in different parts of those continents—for instance, Ireland in Europe or, in several senses, the North American Midwest during the last few decades. My use of “Souths” is above all a reminder of a longstanding tradition that has its roots in Hegel’s tri-partition of Europe and has been forerunner of orientalism (see Mignolo, 2000). According to this tradition, the European and US Souths have been described as “exceptional” (see Lassiter, 2006) places,

characterized by backwardness with respect to the core of their continents—particularly, Western Europe and the UK, and the East Coast and California.

Prominent examples of this genre are: Edward Banfield’s “amoral familism” (1958) and Robert Putnam’s depiction (1993) of the “Hobbesian” Southern Italian societies; John Reed (1972) and William Miller (1973) on the “enduring” southern US subculture; and the use of the “Third World” metaphor in both regions (e.g. King, 1982; Goldfield, 1981, p. 1027). Orientalist arguments have recently made a comeback to explain the sovereign debt crises of Southern European countries (and Ireland) as the result of profligate public spending and laziness of workers (Leontidou, 2014; Tulumello, 2020)—the most (in)famous examples are the label “PIIGS” attached to those countries³ and former Eurogroup Chair Jeroen Dijsselbloem’s claim that Southerners had been using EU cash on “wine and women”.

Culturalist explanations have recently been challenged by three strands of studies, often inspired by Gramsci, on uneven and quasi-colonial relations within European and North American political economies and political cultures, at multiple scales.

First, cultural and historical studies have de-essentialized racial categories by discussing the racialization of “White” Southerners: *Meridionali* in Italy (Capussotti, 2012; Curcio, 2012; Giuliani, 2013); Portuguese migrants in the USA (Bastos, 2018); and “rednecks”, “hillbillies” and “white trash”, that is, poor Whites from Appalachia and other rural regions of Southern USA (Hartigan, 2003).

Second, spatially attentive, political economic critique has argued that the historically slower economic development of these regions—and, at smaller scales, of Southern Italy

³ Itself a remake-cum-extension (to Italy) of the “Europe’s poor 4” label that had some popularity in the 1980s.

versus Northern Italy or of inner/rural regions versus coastal/urban regions in Portugal—is the result of long-term patterns of uneven development (Ferrão, 1987; Cobb, 2005; Lloyd, 2012; Hadjimichalis, 1987; 2011; Rossi, 2013; Bieler et al., 2019; Loperfido & Pusceddu, 2019).

Finally, a heterogeneous strand of studies is held together by the focus on recent processes of (cultural, social, institutional) change and what these latter imply for local/global relations. Rushing (2009) and Peacock (2007) emphasize how the recent history of the US South is characterized by centrality in global cultural and knowledge flows, and tension between persisting racial/ethnic strife and emerging cosmopolitan nature. A number of studies have deconstructed the long-held idea of the “immaturity” or backwardness of Southern European urban and planning policy (Janin Rivolin & Faludi, 2005; Baptista, 2012; Tulumello, 2016; Tulumello et al., 2018).

And yet, despite the potentialities for theory building, Southern Europe and Southern USA have long remained at the “borderlands” (Baptista, 2013) of urban theory (Lloyd, 2012; Garner, 2018; Tulumello, 2018; Fulton et al., 2020, p. 2). One of the historical reasons for the marginality of Southern European urban scholarship was that it was above all developed in national languages, rarely translated into English and therefore not integrated in “international” debates (Baptista, 2012; Fall & Minca, 2012; Minca, 2016; Giubilaro & Picone, 2020). More recently, however, the European South started to emerge as a place for original theorization. This can probably be explained because of both the increasing internationalization of its scholarship and the role of the urban transformation described below in reshaping the positioning of Southern European cities in the global circuit of urban accumulation. On its side, US regional sociology has been concerned with either explaining the South’s exceptionalism or solving its “problems” (Garner, 2018). In doing so, it neither aimed at developing original theorization nor

engaged in international debates, including those made from post- and decolonial perspectives. In the USA, the incapacity to explain differences has gone so far that “few scholars recognize Southern cities as real ‘American’ cities” (Rushing, 2009, p. 11). In short, both regions have generally been discarded as outliers to grand urban theories developed elsewhere—precisely the problem that southern urban critique has exposed in relation to the Global South.

Therefore, paraphrasing the reflections made on theory from the Global South (Comaroff & Comaroff, 2012), a case can be made for challenging dominant urban theories from the Souths of the Wests. This call has recently been made by Southern European scholars with regard to urban development and planning (Leontidou, 1993; Baptista, 2013; Tulumello et al. 2018); segregation, fragmentation and fortification (Dines, 2016; Tulumello & Colombo 2018; Arbaci, 2019); informal housing (Chiodelli, 2019; Chiodelli et al., 2021); and social movements (Leontidou, 2010)—with some examples from Southern USA too (Rushing 2009; Z. Robinson, 2014; Garner 2018).

Finally, as previously argued, these two regions have, in the past, been in different positions of global relations: Portugal, Spain and Italy as colonial powers; the Confederacy, first, as a colony itself and as the last place on earth to abolish slavery afterwards. This is to say, I have no intention to discount that history—which is itself still present (see below)—but rather to expose the necessity to historicize world-scale relations through geographically sensitive lenses.

The urban Souths of the Wests: toward a comparative framework

With the goal of building a comparative framework among the Souths of the Wests, let us start, and then depart, from Lila Leontidou’s pioneering work on Mediterranean

European cities (1993; 1996). Before southern approaches became mainstream in urban studies, Leontidou set out to deconstruct the dominance of theories, based on other (European and North American) contexts, that could not explain urban dynamics in Southern Europe. She offered a “southern alternative” to matters of political economy, urban planning, housing and welfare, and urban cultures. I find much value in her rediscovery of Gramscian concepts like hegemony and intellectuals—the latter, for instance, is crucial to understand the obfuscation of “western others” (1996, p. 191) in urban theory (see also Schneider, 1998, pp. 12-16). At the same time, I broadly concur with Nick Dines’ sympathetic critique:

I find her need to delineate the common attributes of southern [European] cities problematic and somewhat counterproductive. Leontidou is certainly alert to the existence of exceptions and differences within Mediterranean Europe [...]. However, [...] her desire to deconstruct urban theory is often trumped by her move to build a rescaled, southern “grand narrative” (to use her postmodern vocabulary) in order to expose and confront a “northern cultural hegemony” (2016, § 9; see also Giubilaro & Picone, 2020, p. 107).

Indeed, my endeavor is not seeking the common characters of the “southern city of the West” or, with Giubilaro and Picone’s words (2020, p. 108), to “postulate [another] urban paradigm”, as this implies two shortcomings. Analytically, the risk is homogenizing the experiences of southern European and US cities within a single narrative—therefore failing to develop a fully relational and multi-scalar framework. Normatively, by falling into the trap of culturalism, this endeavor could ultimately produce another—if less morally and racially connoted than earlier—exceptionalism. Rather, my approach is twofold: On the one hand, it follows the idea that regional differences matter not so much

in terms of culturalistic explanations, but rather of “more prosaic socioeconomic motives” (Maloutas, 2018, p. 254); on the other, it aims at nuancing the type of “findings” and conceptualizations that southern urban critique can produce. Keeping this in mind, the adoption of a comparative framework will be my epistemological instrument to expose *multi-scalar relations* between the Souths of the Wests and their continental contexts.

This is where a generative comparative tactic comes in handy by helping move “beyond the ‘global’/‘local’ dichotomy” and focusing “on the specific set of flows, networks, connections, influences, circulations which add up to what had been called ‘globalization’,” and use these as a “way to understand the empirical and conceptual connections amongst distinctive places” (J. Robinson, 2016, p. 12). Through these lenses, the urban frameworks of the European and US Souths appear to be complementary and, at the same time, analogous.

They are complementary in the sense of being cases of “maximum variation” (Flyvbjerg, 2006) as far as urban density, racial and class segregation, and economic performance are concerned. First, urban fabrics are on average quite dense in Southern Europe, particularly so in central cities of metropolitan areas. On the contrary, Southern US cities are characterized by low densities and sprawling urbanization. Second, US cities are characterized by stark levels of racial and class segregation. This is the case for southern cities too: Though traditionally, the latter ranked relatively low on racial segregation, they have recently risen the rankings of economic segregation (Florida & Mellander, 2015; Fulton et al., 2020). On the contrary, Southern European cities have been used, because of their very low levels of spatial segregation, to expose the limits of this concept in explaining exclusion and housing outputs outside North America (Maloutas, 2012; Arbaci, 2019). Finally, third, in terms of economic performance, though both regions have historically been among the least wealthy of their continents, things

changed recently. During the last few decades, the US South has been among the most dynamic regions of the country—without solving, however, its problems of poverty and exclusion (Fulton et al., 2020). Things are more complex in Southern Europe, which has been lagging behind the European context, with the exception of some years of convergence in the late 1990s (Bouayad-Agha et al., 2013). Importantly, economic performance has been internally quite variegated too: The example of Northern versus Southern Italy is the most obvious, but let us also remind the rapid growth of Barcelona and Spain more generally in the 1990s and early 2000s, and Portugal after the global economic crisis and before the Covid-19 pandemic (roughly 2015-2019).

At the same time, the urban territories of Southern Europe and Southern USA are analogous in terms of recent patterns of neoliberalization and globalization. Geographical and political economic critique has argued that these regions have become vanguards of neoliberalization (Cobb, 2005; Lloyd, 2012; Hadjimichalis, 2011; Rossi, 2013; Bieler et al., 2019)—see Leontidou on “the choking penetration of capitalism in the Mediterranean” (2014, p. 552). These regions’ previous relative isolation in the global division of labor has made them “more or less virgin” territories for accumulation (Lloyd, 2012, pp. 491). This eased a rapid penetration of global capital flows with contradictory implications. On the one hand, these regions have become places of late and turbulent iterations of transformations that had been typical of previous rounds of accumulation elsewhere—see Tulumello and Picone (2016) on the late boom of shopping malls in Southern Europe and their role in fostering dependent development. On the other hand, the European and US Souths have been places of experimentation and innovation in production and exploitation—see Peano (2017) and Palumbo and Sciarba (2018) on the agro-industrial sector in Southern Italy and Spain. The deployment of a comparative lens means exploring the different impacts of these global(izing) phenomena on the two

regions. For instance, increasing inequality and polarization have worked differently amid slower economic development in Southern Europe than in the South of the USA. In Southern USA, many cities have become representative of “contemporary trends of persistent poverty and stagnant wages even alongside economic expansion” (Lloyd, 2012, p. 485) as a consequence of entrepreneurial urban governance aimed at attracting investments (see also Nunn, 2019). Globalization and neoliberalization have also impacted urban policy differently, mainly due to different political and multilevel institutional arrangements—see Tulumello (2018) on urban security in Memphis and Lisbon.

Racial/ethnic stratification is paradigmatic of analogy in difference. Both regions have been places of emigration since the late nineteenth century—with few exceptions like the industrial triangle of North-Western Italy, which has long been recipient of internal migration—and have become recipients of international immigration since the 1990s (e.g., Lo Piccolo & Leone, 2008; Lloyd, 2012). However, immigration added layers of diversity on a traditionally dual (White and Black) society in the South of USA and a relatively more homogeneous society in Southern Europe—but with exceptions, linked to the history of colonialism (see Giuliani, 2013; Peralta & Domingos, 2019) and the long-term presence of Roma and other Gitano groups (see van Baar et al., 2018).

In synthesis, what puts together these urban frameworks is not any major cultural, spatial or social *feature* in common. Rather, their analogies lie in the political economic *relations* of uneven development within their continental contexts. In particular, they have in common a number of transformations in the field of urbanization and real-estate, as the socio-economic processes here described have been intertwined, since the 1980s, with analogous trends of spatial reorganization, made up of coexisting processes of

metropolization and counter-urbanization, plus stratification, polarization and fragmentation (Lloyd, 2012; Salvati et al., 2016; Tulumello & Colombo, 2018).

Comparing housing amid and after the crisis in the Souths of the West

The frame of analogy in difference constitutes both the context and epistemological instrument for deploying the comparative method on housing in Southern Europe and the South of USA. In line with my epistemological strategy, the goal of this section is not comparing the two housing systems *per se*, for two reasons: analytically, because of the extremely different multilevel institutional arrangements among these two regions (constituted, respectively, by four countries within a political and economic union, and of several states within a nation); and, epistemologically, because my goal is not postulating new, “Southern” housing paradigms (see previous section), but rather exploring the embeddedness in their continental frameworks. For these reasons, the housing systems will constitute the context of “maximum variation” (Flyvbjerg, 2006; see above), necessary to frame the discussion on how the relations of these regions with their continental cores contribute to shaping analogous housing dynamics. In particular, I will focus on transformations caused by, and related with, the global economic crisis and the following economic growth, and on multi-scalar relations therein.

Framing differences: housing systems

In both regions housing policy is a local responsibility, with supra-local governmental levels being regulators and funders. The multilevel organization of these relations, however, is significantly different. In the USA regulation and funding are the purview of

one institution, the federal government's Department of Housing and Urban Development (HUD). The European situation is more complex. On the one hand, funding and regulation are competence of states and, in Italy and Spain, regions and autonomous communities. On the other hand, however, the European Union (EU), despite never having been endowed formal competence over housing, has had a role, through indirect and implicit policies and regulations in other areas, in pushing (Southern) housing systems toward specific outcomes like homeownership and liberalization (Doling, 2006; Allegra et al., 2020)—a role that has become more evident and direct during and after the economic crisis, as we shall see below.

Differences extend well beyond multilevel arrangements, with impact on the way the two regions have been framed in comparative housing studies: While the latter have discussed Southern European housing systems as a “family” (Allen et al., 2004, p. 3) within the European context, there is almost no academic or political conceptualization of a southern US housing system.

In Europe, because of the role of states amid European integration, Gøsta Esping-Andersen's taxonomy (1990) of typologies of capitalism and welfare has inspired a rich field of comparative housing studies. The latter has identified a “familistic” model typical of Southern European countries (e.g., Kemeny, 1995; Arbaci, 2019, pp. 68-69), characterized by residualist policies, high levels of homeownership and the role of family networks in supporting the access to housing. By pitting this model in contrast to universalist social democratic or corporatist models of Central and Northern Europe, comparative studies have long understood Southern European housing systems as “lagging behind” more “advanced” systems of the continental core. Taking steps from the seminal work by Judith Allen and her colleagues (2004), the taxonomic nature of existing comparisons has been criticized on three grounds (Matznetter & Mundt, 2012;

Tulumello et al., 2018): empirically, i) because it overlooks the existence of significant differences among and within the four countries and ii) because it effaces historical trajectories; and, analytically, iii) because it does not question the role of uneven development in building regional differences in the long run.

Comparative welfare studies include the entire USA, together with the UK and Ireland, within the liberal model, without questioning or discussing regional variations or specificities. A paradigmatic example of the invisibility of the regional scale in US housing studies is the most comprehensive study of HOPE VI,⁴ edited by the HUD's secretary that launched the program (Cisneros & Enghdahl, 2009): Only once in the book does the word "South" refer to the region, with regard to migrations of African-Americans from the rural South (idem, p. 250).⁵ This is partially due to the fact that the design of HOPE VI, like virtually all federal programs, had no regional or state strategy, with cities applying directly to federal grants. But, more generally, the invisibility of the US South is also a signal of the tendency of comparative housing studies to assume the national state as its only object of analysis. And yet, much like we have seen for urban dynamics, dimensions exist that suggest the importance, in US housing dynamics, of regional dimensions. Indeed, the latter have been briefly visible to regional sociology concerned with racial segregation in the early 1990s (McDaniel, 1991; Shelton & Gruber, 1991;

⁴ HOPE VI, followed by Choice Neighborhoods, is the biggest federal housing program of recent decades. It provided 240 grants for public housing "revitalization", that is, virtually always demolition, replacement with mixed developments and dispersal of residents (Goetz & Chapple, 2010).

⁵ This absence is not due to the use of other regional frameworks: For instance, also the word "Sunbelt" is absent from the book.

Silver, 1991), which has framed the role of racial relations in housing dynamics in the South of USA. However, by relying on culturalist explanations of southern racism, it has not explored uneven and combined developmental relations associated with the housing/race nexus—which we will discuss below.

Exposing analogies: crisis, uneven development and housing dynamics

Similarly to what we have seen with regard to their urban frameworks, the European and US Souths do not share any significant character of their housing systems. However, the analogous relations of uneven and combined development that link these regions to their continental cores have been crucial in shaping housing dynamics, and this becomes particularly evident through a focus on the nexus between the global economic crisis and regional transformations. Because of their semi-peripheral position, housing, real estate and construction—David Harvey's second circuit of capital—have long been central to the economic systems of Southern Europe and Southern USA, bringing with them the debt-driven growth, financialization and real-estate bubbles that triggered the financial crisis of 2007/2008 (Wily et al., 2008; Garcia, 2010; Schwartz, 2012; Ponzini, 2016). On its side, the crisis has been, in both regions a trigger and the discursive justification for austerity politics that have, on the one hand, deepened urban and spatial inequality (Badger, 2016; Lauterbach, 2016; Knieling & Othengrafen 2016) and, on the other, promoted further rounds of (neo)liberalization (Tulumello, Cotella & Othengrafen, 2020; Saija et al., 2020). The last few years, before the halt imposed by the pandemic crisis in 2020, have been characterized by a new round of dependent growth shaped by processes of urbanization-as-accumulation, variously characterized as gentrification,

touristification and tourism gentrification (Lloyd, 2011, 2012; Annunziata & Lees, 2016; Sequera & Nofre, 2018; Fields, 2019).

Against this backdrop of analogy, a comparative framework allows to expose the role of multi-scalar arrangements in shaping the variegations of these broad-brush processes in the two regions.

Literature focused on urban change had long discussed the specific regional characters of urban and housing systems that made Southern European cities hardly or scarcely gentrifiable (Malheiros et al., 2013; Maloutas; 2018): relatively high rates of homeownership; central urban areas that had never been emptied like US “inner cities”, thus maintaining diverse social fabrics; regulation-oriented models of urban planning and housing that had traditionally limited certain forms of speculation and protected tenants. As we have seen, things abruptly changed during the last few years, with rapid gentrification and touristification. How was this possible? In the long run, the way had been paved by the progressive liberalization of housing at least since the 1980s, with the reduction of tenant protections, cancellation of rent caps, and, more generally, the production of the regulatory and fiscal frameworks to stimulate housing financialization (López & Rodríguez, 2010; Belotti & Arbaci, 2021; Tulumello & Dagkouli-Kyriakoglou, 2021). During the years of crisis and following economic growth, Southern European countries have accelerated reforms in the sectors of housing and planning, with the discursive goal of fostering economic development (Belotti & Arbaci, 2021; García-Lamarca, 2020; Tulumello & Dagkouli-Kyriakoglou, 2021). For instance, both Portugal (Law 31/2012) and Spain (Law 4/2013) further liberalized their rental markets, Italy introduced several reforms to ease public-private partnerships in social housing, and Greece (Law 4346/2015) eased repossessions by reducing protections to defaulting households. Relations of uneven development within the European context are crucial to

understand these transformations. In general terms, the progressive peripheralization of Southern Europe (see above) provides the framework for the insistence on real estate, construction and touristic development. More specifically, a concrete role has been played by the EU. Before the crisis, this role has been implicit and indirect (Stephens, 1999; Doling, 2006; Allegra et al., 2020): deregulation and integration of financial markets have long promoted debt-fueled homeownership; fiscal austerity has been crucial in pressuring states to cut housing expenditure; and, more generally, the pressure for European integration has stimulated liberalization. This role has become more direct and explicit during the years of crisis (García-Lamarca, 2020; Tulumello, Cotella & Othengrafen, 2020): EU institutions have explicitly requested the liberalization of rental markets to Portugal and Greece in the context of the financial bailout of the two countries; measures to ease the acquisition of repossessed housing stocks by large investors have been included in the bailout of the Spanish financial sector; and implicit conditionalities have been used to promote similar reforms in Italy.⁶

On the other side of the Atlantic, gentrification and touristification studies, which had long bypassed southern US cities (Yonto & Thill, 2020)—something especially surprising once we recall that the concept of “tourism gentrification” was created to make sense of urban change in New Orleans (Gotham, 2005)—have recently made a comeback (e.g. Lloyd, 2011; Lavy et al., 2016; De Oliver, 2016; Smiley et al., 2016; Yonto & Till,

⁶ The fact that the EU has actively pushed certain political and policy developments does not imply that national and local governments and elites have been passive “recipients” of the process: on the one hand, we have mentioned above that the liberalization and financialization of housing has a quite long history; and, on the other, national governments have often discursively used “European pressures” to justify their own political agendas (e.g. Moury & Standring, 2017).

2020). In particular, some studies have taken preliminary steps toward a re-theorizing of gentrification, often with specific attention on racial relations. For instance, Markley and Sharma's study (2016) of intersecting gentrification and revanchism in Roswell links New Urbanism to historical patterns of racialized planning. By focusing on Charlotte, Yonto and Thill (2020) problematize the idea, common in Northern American gentrification studies, that gentrifiers tend to avoid historical African-American neighborhoods, pointing toward some characters of specificity of southern US gentrification linking low-densities and local patterns of urbanization. Another specificity is that, in cities where in-town living traditions are weak (e.g. Nashville, Houston, Charlotte, Atlanta; Lloyd, 2012, p. 494), gentrification entails processes of renegotiation of urban cultures and development policies (e.g. De Oliver, 2016; Smiley et al., 2016; Yonto & Thill, 2020). But, since the point is not finding the specific characters of a "southern gentrification", but rather exposing multi-scalar and geographical relations, let us place these processes within the wider trends of restructuring I have discussed, and in particular: the recent development of tech, research, health and university economy throughout the US South (Lloyd, 2012); the role of New Urbanism to attract "creative classes" and its interrelation with the housing bubble (Lloyd & Christens, 2012); and technological transformations that opened up to new forms of financialization during economic rebound (Fields, 2019). Within the unitary US housing system, regional specificities of housing transformations in the South are evident above all in the role of historical racial inequalities. The latter, in turn, have been central in constituting the national nexus among homeownership, housing bubble and financial crisis. A paper published just before the financial crisis argued that the supply of cheap housing was one of the major drivers of the fast growth of Southern and Sunbelt cities, especially since the 1990s (Glaeser & Tobio, 2007). More careful analyses, however, made it evident that the

“cheap” supply was in fact largely due to subprime mortgages, a market aggressively promoted as a means to make the homeownership dream reality for Black and Brown southerners, ultimately deepening pre-existing racial exclusion (Wily et al., 2008). The burst of the subprime bubble produced a foreclosure crisis and, afterwards, asymmetric recovery that deepened housing burdens, as well as racial and regional inequalities (Mellnik et al., 2016; Fulton et al., 2020, p. 12)—with Atlanta and Memphis being paradigmatic examples (Badger, 2016; Frankel & Keating, 2018). As homeownership rate fell faster in the South than in other regions (Fulton et al., 2020, p. 12), the years of recovery have been characterized by the increase of family rental homes linked to processes of financialization, a phenomenon especially prevalent in Sunbelt cities and southern ones like New Orleans, Miami, Atlanta, Orlando and Memphis (Frankel & Keating, 2018; Immergluck, 2018; Fields 2019; Fulton et al., 2020, p. 12).

Conclusions

In this article, I have set out a relational, multi-scalar and comparative framework for the urban dynamics and housing systems of two regions at the “Souths” of the “West”, with the goal of exposing the relations of uneven and combined development at the core of those dynamics. I have focused on how contexts characterized by different historical trajectories, urban fabrics and institutional arrangements have been impacted by globalization and neoliberalization in the wake of the global financial crisis. This approach allowed, for instance, to problematize the idea of “lagging” Southern European welfare systems, by emphasizing the role of global dynamics and European institutions in keeping those welfare systems at bay; and to expose how the historical racial dynamics

driving housing inequalities in the South of USA have recently become central to nation-wide patterns of accumulation.

In order to reflect on the implications of this exercise for southern urban critique more generally, let me now paraphrase Lawhon and Truelove's three arguments (2020; see above).

First, the Souths of the Wests are *empirically different*, as shown by the failure of mainstream (North American and Western European) theories to explain the specificities of their housing systems, their patterns of inequality and exclusion amid lower levels of segregation, or recent processes where urban change intersects with local institutional and cultural arrangements.

Second, these regions have *different intellectual and vernacular traditions* that need to be accounted for in their own terms—as mirrored in the recent emergence of Southern Europe as a place of original theorization.

Third, the previous points *do interrogate the production of knowledge* and especially those theoretical categories produced on the grounds of empirical research made in core-regions of the Wests and long used to explain the “exceptionalism” of the Souths—ending up in the trap of culturalism and, oftentimes, racialization. This interrogation is important beyond the Souths of the Wests. Betsie Garner (2018, p. 4) suggests that the tendency to generalize findings from Northeastern US cities as if they were “America” has also made the North “invisible”, that is, obscured this region's own characters. The same can be said in Europe. In other words, much like the argument made by Comaroff and Comaroff (2012) with regard to the Global North/South divide, a move toward a regional-relational study within the Wests can also foster more nuanced understandings of the very places so far at the core of theorization.

These three points should make it evident that the concept metaphor of the “south” has enormous analytical and strategic power to explore urban and housing dynamics and systems—and the production of knowledge about them—in the European and US Souths. Importantly, however, this does not imply equating the experiences of the Souths of the Wests with the experience of—or, better, any experience in—the Global South. Especially useful here is Arrighi and Piselli’s seminal work (1987) on capitalist development in Southern Italy between the 19th and 20th century, a comparative history of three rural areas in Calabria that exposes the role of local social, cultural and territorial characters in shaping the transition from feudal to capitalist relations. This work stands squarely within the critique of Italian uneven development. At the same time it offers important remarks on peripheralization *within* a developing, and then fully developed, country. While the developmental patterns of Southern Italy were powerfully shaped by quasi-colonial political economic relations, Arrighi and Piselli remind us that individuals in those regions had access to a number of opportunities—above all, freedom of migration to the industrial north and the national welfare system—that are not generally available in colonial and postcolonial contexts.

This argument can be partially paraphrased into the comparative exercise I have carried out. The freedom of movement enjoyed by European and US Southerners persists and, in Europe, has widened thanks to the EU. With regard to welfare policies, the US South has accessed the same federal funding as any other city in the country, while things are more complex amid European integration. Southern European countries have long benefited of European Structural Funds provided with no strings attached at the same time as EU-enforced monetarism contributed to the rollback of their national welfares (Bieler et al., 2019; Allegra et al., 2020). More recently, in times of crisis and austerity, bailouts and other forms of financial support have been attached to stringent conditionalisms used

to impose further neoliberalization and welfare retrenchment (Hadjimichalis, 2011; Tulumello, Cotella & Othengrafen, 2020). The similarities of these trends to typical neoliberal adjustment programs in the Global South are so striking to justify the deployment of Clastre's boomerang metaphor (Tulumello, 2020; Tulumello, Saija & Inch, 2020).

This, in conclusion, brings us back to Souza's argument (2019) for a relational, spatial, and above all multi-scalar, use of metaphors like "core/periphery" and "north/south". Take, for instance, the concept of "semi-periphery", coined by Immanuel Wallerstein (1984) and afterwards applied to the case of Southern Europe (e.g. Arrighi, 1985; Gambarotto & Solari, 2015). Boaventura Sousa Santos (1985, p. 870) argued that Wallerstein's formulation remained descriptive, vague and negative; and offered a theorization of semi-periphery applied to the case of Portugal, arguing that, in order to be a productive concept, this needs to

refer to a specific social materiality, that is, a set of social, political, economic and cultural conditions that internally characterize the Portuguese society and make it generally adequate to perform roles, which can themselves differ among different historical times, of center/periphery mediation (*ibidem*, p. 871; my translation).

The comparative framework used here can productively enrich Santos' theorization by adding its missing dimension, the spatial and territorial one. More generally, it is my contention that the approach I have adopted—and particularly the argument for integrating relational, multi-scalar and comparative dimensions—has the potential to provide crucial instruments for keeping, and deepening, the analytical grasp and political relevance of southern (urban) critique.

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