

Article

Affordable Futures Past: Rethinking Contemporary Housing Production in Portugal While Revisiting Former Logics

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Abstract

This article focuses on a specific term associated with the scientific, theoretical, and academic discourse on housing architecture in Portugal. Over the last 100 years, the term “affordable” has frequently been used in the vocabulary of urban housing in Portugal, being linked to other words commonly used in housing construction, such as *económica* (economical), *barata* (cheap/inexpensive/low-cost), *pobre* (poor), *cooperativa* (cooperative), or even *custos controlados* (controlled costs). Therefore, we propose to explore the multiple appropriations and contemporary shifts in its original meaning, seeking in this way to: (a) further stimulate the contemporary discussion on types of buildings, public housing programmes (i.e., following a historical perspective), contemporary housing policies (e.g. Basic Housing Law and New Generation of Housing Policies), refurbishment policies, new regulations, and new models for the middle classes (in Portugal); (b) share perspectives about the updating of this concept and the materialisation of its respective types and models in contemporary architectural practice; and (c) build bridges between the past and the present (public and private models and solutions, and shifts in the target audience). Although a wide range of different words was used to describe “affordable housing” in Portugal from the early 20th century to the first decade of the 21st century, it is essential to stress the importance of several newly emerging concepts. In recently implemented laws, concepts such as *economicamente acessível* (economically accessible) and *custos controlados* (controlled costs/low-cost) encompass the shifts in the meaning of the term “affordable” and broaden the contemporary discussion of the housing problem in relation to the type of property and target audience.

Keywords

affordable housing; ageing in place; energy efficiency; housing policies; Portugal; state-subsidised housing

Issue

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1. Introduction: Rethinking Housing Production Through a Guide to Specific Terminology

As in other international contexts, today the construction of affordable housing raises several questions, given the significant escalation in house prices (Xerez et al., 2019, p. 68). There is a lack of housing solutions not only for the disadvantaged population but mostly for the middle classes who cannot afford to rent or buy houses in the property market. In this sense, the Portuguese housing crisis is due, in part, to the lack of affordable

homes—in other words, homes that are accessible to ordinary people. To put it simply, these phenomena can be seen as the result of the strategies and policies pursued during the last few decades, in accordance with a neo-liberal ideology of reducing the role of the welfare state (P. R. Pinto, 2009): selling off the state housing stock, for example, or giving banks (financial capital) the role of regulating access to housing, through benefits for house buyers (Aalbers et al., 2020; A. C. Santos, 2019). As can be seen in several European countries (A. Santos et al., 2016), these policies have promoted the deregulation of

all social sectors, especially housing (T. C. Pinto & Guerra, 2019; Ribeiro & Santos, 2019).

As house prices have been rising dramatically in Portugal, just as in many other European countries, there has been a natural shift in housing policy. In the last few years, among other factors, we can observe:

- A shortfall in the number of dwellings available for rent or purchase, as the market is unable to supply solutions at affordable prices;
- A sudden increase in tourism in cities such as Lisbon and Porto, which has led to the uncontrolled proliferation of short-term rentals;
- An apparent deregulation in terms of public policies (Xerez et al., 2019, p. 68), which cannot prevent speculation in the property market.

Understanding the challenges of affordable housing makes it necessary to address the complex set of trends and factors in play, such as income and wealth, and, naturally, social, economic, and urban factors. For most low- and middle-class families, household income is the primary factor that determines housing affordability. Nevertheless, in this article, we are not focusing on how

housing affordability is currently measured in Portugal, or its definition (which would be a whole field on its own), but how the concept of affordability is evolving in Portuguese “language,” among policymakers, architects, and researchers.

This article proposes a diachronic reading that was made possible by the production of a specific book (Figure 1). The *Guide to Specific Terminology in State-Subsidized Residential Architecture in Portugal [1910–1974]* (Lameira & Rocha, 2019) was published in July 2019 under the scope of the research project “Mapping public housing: A critical review of the state-subsidised residential architecture in Portugal (1910–1974)” (Ramos, Gonçalves, et al., 2021). This book seeks to clarify the broad set of concepts, terms, and denominations associated with the discourse on housing architecture in Portugal. The guide consists of two distinct sections: programmed housing (1910–1974) and housing. The first of these is directly connected with the several state-subsidised housing programmes implemented in Portugal (legislative context, bibliographical references, and an exemplary listing of the built housing); the second section encompasses a set of terms frequently used in research related to urban housing,



Figure 1. Cover of the printed edition of the *Guide to Specific Terminology in State-Subsidized Residential Architecture in Portugal [1910–1974]*. Source: Lameira and Rocha (2019).

including some relevant terms in the construction of a parallel between the Portuguese reality and the context of other countries.

The term “affordable” is dealt with in some detail in this book, since most state-subsidised housing programmes from the First Republic (1910–1926) until the fall of the dictatorship regime in Portugal, in 1974, were designed, precisely, to build economic housing.

The article is divided into three main sections: The first section establishes a perspective regarding the promotion of affordable housing from the beginning of the 20th century to the present day, namely focusing on the different public programmes implemented since 1910; the second section explains the contemporary housing initiatives currently being implemented in Portugal; and the third section focuses on the housing challenges that will be faced in the next few years in terms of affordable housing in Portugal.

2. From Past to Present: A Panoramic Overview of Shifts in the Concept of “Affordable”

The question of low-income housing in Portugal has been addressed by various authors in regard to certain aspects or geographies (Almeida, 2010; Janarra, 1994; Portas, 2013; Queirós & Pereira, 2012), making the relationship that exists between ideology, welfare policies, and housing one of the most challenging and longest-lasting subjects of study. As was the case in a number of other European countries (A. C. Pinto & Martinho, 2016), the first social welfare policies were implemented by a corporatist authoritarian government (Pereira, 1999; P. R. Pinto, 2009; Rosas & Garrido, 2012), leading to measures that addressed the basic needs of the poor. Nevertheless, the state introduced such measures under the assumption of a political form of social control (Gonçalves, 2018; Ramos et al., 2014, 2018, 2020; Ramos, Gonçalves, et al., 2021, pp. 2–3), which had implications for the housing solutions that were adopted—dwelling types, layouts, urban models—throughout the programmes implemented until 1974 (Ramos, Pereira, et al., 2021).

2.1. State-Subsidised Programmes (1910–1974)

In Portugal, between 1910 and 1974, the term “affordable” was commonly used to identify low-cost housing solutions for certain strata of the population with variable incomes: the “petite bourgeoisie,” composed of service personnel, state officials, and factory managers; in other words, individuals who had sufficient income to afford the house and insurance payments and, above all, displayed good political conduct. This term was appropriated by the main initiatives in housing construction implemented by the different political regimes from the First Republic (1910–1926) to the Estado Novo dictatorship (1933–1974), in the form of various housing programmes (Silva & Ramos, 2015; Gonçalves, 2018). One important example from the First Republic was the Social Housing District programme (Bairro Social Decree-Law No. 5443 of 26 April 1919; Figure 3), while the main housing programmes of the Estado Novo regime included the Affordable Houses programme (Casas Económicas Decree-Law No. 23052 of 23 September 1933; Figure 2), the Houses for Poor Families programme (Casas Para Famílias Pobres Decree-Law No. 34486 of 6 April 1945), and the Affordable Rented Houses programme (Casas de Renda Económica Law No. 2007 of 7 May 1945). “Affordable housing” is the term most commonly associated with the expression *casas económicas*, whose direct translation would be “economical houses.”

The links between the different programmes implemented until 1974 were weak, without there being any coherent housing policy evolving over time. They should therefore be seen as a reaction to political circumstances (corporative policies, state exhibitions, international events, natural disasters, among others) and a response motivated by specific political decision-makers. Globally, all actions in the field of housing were intended to combat the misery and human degradation that prevailed, above all, in Porto and Lisbon, seeking to abolish (or conceal) the image of dirty and unhealthy cities with a mass working population. Disregarding the few new residential neighbourhoods initiated by the



Figure 2. Alto da Ajuda (Lisbon) affordable housing estate: Phase 1, 1934–1938 (reference a223 in Mapa da Habitação [MdH] database). Source: Novais (n.d.).

republican governments (1910–1926), which had ideological social support, investment in housing under the Estado Novo regime (Salazar’s dictatorship) was not primarily intended for proletarians. The focus was on attracting public employees and skilled workers to support the government (Patriarca, 1995a, 1995b). Only much later were local policies such as the Improvement Plan of Porto (Decree-Law No. 40616 of 28 May 1956) and the Plan for Constructing New Housing in Lisbon (Decree-Law No. 42454 of 18 August 1959) able to reach workers who had only very limited resources.

In that sense, the ideological lines that determined the characteristics and differences of the programmes can be summarised as follows:

1. Over the course of the short duration of the First Republic (1910–1926), the state put into practice its ideological wish to attend to workers’ social needs by improving their quality of life, through government decisions linked to guaranteeing housing and education (for example) as basic rights and as a necessary foundation for greater social development. However, the few programmes that were launched—the Affordable Houses Neighbourhood programme (Bairro de Casas Económicas Decree-Law No. 4137 of 25 April 1918); the Social Housing District programme; and the Affordable Houses Regime (Regime das Casas Económicas Decree-Law No. 16055 of 22 October 1928)—were insufficient to guarantee the completion of large neighbourhoods. The underlying causes of this situation were, among others, the permanent political and social unrest, the lack of financial resources, which had been depleted by the First World War, and, above all, the inability to establish technically effective and non-corrupt local and central organisations that were willing to plan, design, and undertake work in this area (Gonçalves, 2018).
2. Incidentally, this aspect served as one of the main arguments for the implantation of the totalitarian state, the Estado Novo regime, that immediately followed the Portuguese First Republic. The implementation of the New State Decalogue explained that “the individual exists socially as part of natural groups (families), professions (corporations), territories (municipalities), and it is in this capacity that all necessary rights are recognised” (Decálogo do Estado Novo, as featured in a government advertisement poster in 1934). From this statement, we can more easily understand the political importance and the long duration of the first and the most coherent housing programme implemented by the regime—the Affordable Houses programme (Casas Económicas; Decree-Law No. 23052 of 23 September 1933)—which was conceived as a political weapon for ensuring stricter social control and became both a reference and a counter-reference for all other actions in the housing field until the 25th of April revolution, in 1974.
3. The various programmes implemented by the Estado Novo regime (Figure 5) reflect a complex bureaucratic web, totally centred on the figure of the dictator, with the capacity to design, build, manage, and allocate houses, as well as to monitor whoever inhabited them, responding to the regime’s corporate ideology. We should not conclude that this implied a coherent housing policy. Instead, it was the result of fierce internal struggles, waged between the powers and the services, and allowing one programme to move forward while another one was forced to retreat.
4. Among the programmes created by the Estado Novo regime, there were three that had an eminently social function due to their circumstances, such as those relating to resettlements (public events and infrastructures), natural disasters, and manifest poverty: the Demountable Houses Programme (Programa das Casas Desmontáveis Decree-Law No. 28912 of 12 August 1938); the Houses for Poor Families programme; and the Plan for Rehousing Disaster Victims (Plano de Realojamento dos Sinistrados Decree-Law No. 48240 of 17 February 1968).
5. After the Second World War, and compared to other European states, studies of the national territory identified Portugal’s underdevelopment as resulting from the contradictions in the adopted development model (Murteira, 1979; Patriarca, 1995a, 1995b; Pereira, 1974), which, together with a policy of industrial protectionism, made it difficult to sustain the “single house” model and its programmes. Nonetheless, the advent of a new generation of technocratic politicians with international training allowed for a prudent extension of the housing question to other types of dwellings, becoming more aware of economic efficiency and the capacity to create the most significant number of homes in a short period. In particular, and together with the former Affordable Housing Programme (1933–1974), based on single-family housing, the construction of multi-family housing blocks in the modern architectural style came to be accepted, such as the Affordable Rented Houses programme and the Controlled Rent Housing programme (Casas de Renda Limitada Decree-Law No. 36212 of 7 April 1947). These new programmes, built by young modern architects, gave rise to the creation of some large-scale neighbourhoods, shaping the growth of the first urban peripheries (Tavares, 2016).

These programmes contributed to the construction of a significant number of dwellings (Figures 4 and 5) across the country and motivated the development of other

HABITAÇÃO PROGRAMADA

TIAGO, Maria da Conceição (2010). "Bairros Sociais da I República: projectos e realizações". In *Ler História* Nº 59. Repúblicas: Culturas e práticas.

[s.n.], (2000). "As Ilhas, as Colónias Operárias e os Bairros de Casas Económicas". Porto, Pelouro de Habitação, Câmara Municipal do Porto.

[s.n.], (1996). "Plano de Melhoramentos 1956-1966". Porto, Câmara Municipal do Porto / Direcção dos Serviços do Plano de Melhoramentos.



Fig 2 e 3 Bairro Social da Arrábida [© Gisela Lameira]

HABITAÇÃO PROGRAMADA

Bairro Social [BS]

Programa de habitação suportado através do Decreto-Lei 5443, de 26 de Abril de 1919. Regulamento para a construção dos bairros sociais.

EXEMPLOS
(4 inventariados a 02.2019)

Bairro Social do Arco do Cego [Fig. 4 e 5]. Lisboa, 1919-1935 | Arnaldo Adães Bermudes, Frederico C. de Carvalho, Edmundo Tavares.
GPS: 38.739694N, 9.140287W

Bairro Social da Covilhã, 1919 | Nogueira Júnior, Campos Melo (eng.), Jorge Coutinho (eng.)
GPS: 40.282579N, 7.511536W

Bairro Social de Alcântara, Lisboa, 1919 [demolido] | [s.n.]
GPS: 38.713044N, 9.183718W

LEGISLAÇÃO ESPECÍFICA

Decreto-Lei 5443, de 26 de Abril de 1919
Ministério do Trabalho, 11ª Repartição da Direcção Geral da Contabilidade Pública Diário do Governo nº 87/1919, Série I de 1919-04-26

"Tornando-se indispensável ao Governo realizar uma operação de crédito para custear as despesas de construção do bairro operário a que se refere o decreto-lei nº 5397, de 14 do corrente, bem como de mais quatro bairros destinados a operários e às classes menos abastadas; Considerando a conveniência da construção desses bairros, para acudir com obras produtivas à crise da construção civil, substituindo por trabalhos de utilidade pública as reparações improvisadas, nem sempre de necessidade absoluta; (...) Artigo 1.º E o Governo autorizado a negociar na Caixa Geral de Depósitos um empréstimo de 10.000 contos, destinado à compra de propriedades, aquisição de materiais e ao pagamento das restantes despesas relativas à construção de cinco bairros para habitação de operários e das classes menos abastadas." (DL 5443: 687; 688)

REFERÊNCIAS

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FERREIRA, Maria Júlia (1994). "O Bairro social do Arco do Cego - uma aldeia dentro da cidade de Lisboa". In *Análise Social*, Vol. XXIX, Nº 127, pp. 697-709.

GONÇALVES, Eliseu (2013). *Bairros de Habitação Popular no Porto, 1899-1933. A Prática de uma Arquitectura Económica, Saudável e Cômoda nas Vésperas do Moderno*. Porto, Tese de doutoramento em Arquitectura, Faculdade de Arquitectura da Universidade do Porto.

MATTOSO, José, dir. (2011). *História da Vida Privada em Portugal*. Temas e Debates, Círculo de Leitores.

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SILVA, Raquel Henriques da (1997). "Bairro Social Arco do Cego". In A. Becker, A. Tostões, W. Wang (coord.), *Portugal: Arquitectura do século XX*. Lisboa, Prestel.

[s.n.], (1920). "Os bairros sociais". In *Ilustração Portuguesa*, Nº 746, pp. 392-393.



Fig 4 e 5 Bairro Social do Arco do Cego [© Gisela Lameira]

Figure 3. Social Housing District (Bairro Social), 1919. Notes: This double-page spread represents the *Bairro Social do Arco do Cego*, Lisbon, 1919–1935, which was completed during the Estado Novo regime (reference a216 in MdH database). In these pages, we can also find information about the specific regulation that gave rise to this housing programme and some bibliographical references. Source: Lameira and Rocha (2019, pp. 40–41).

organisations and promoters with administrative and financial autonomy, designed to solve the housing problem, such as the 1969 fund for the development of social housing schemes (Fundo de Fomento da Habitação). What distinguishes the housing policy in Portugal from other regimes—some authoritarian and corporative in Europe—is Salazar’s “obsession” with private

property. Having as a primary focus the construction of a middle class, this fact can be seen as constant throughout the regime, directly or indirectly prevailing in most implemented housing programmes. The implemented programmes were based on different property regimes. For example, the specific Affordable Housing Programme (Decree-Law No. 23052

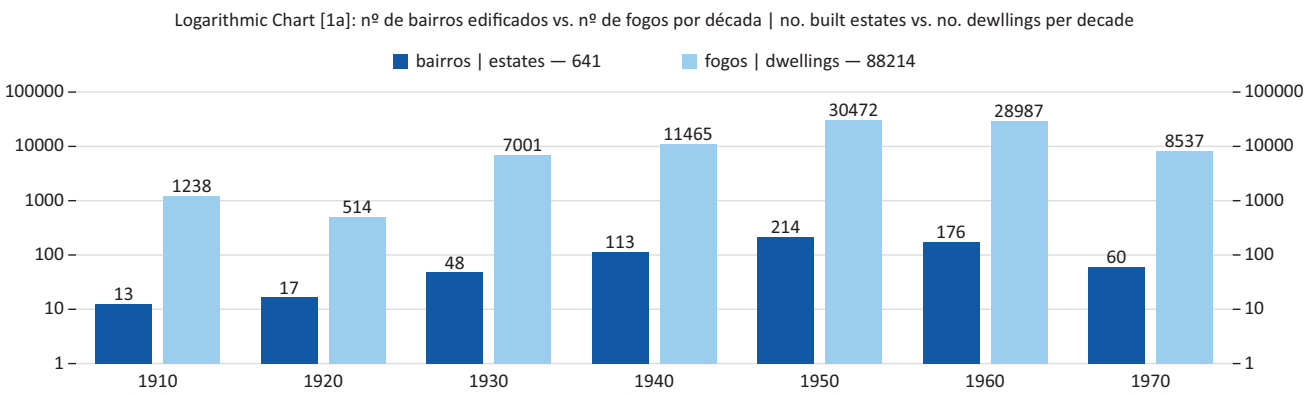


Figure 4. Linear chart with information about the number of dwellings built in each programme. Note: The universe is composed of built estates and dwellings built between 1910 and 1974, included in the MdH database. Source: Ramos, Gonçalves, et al. (2019).

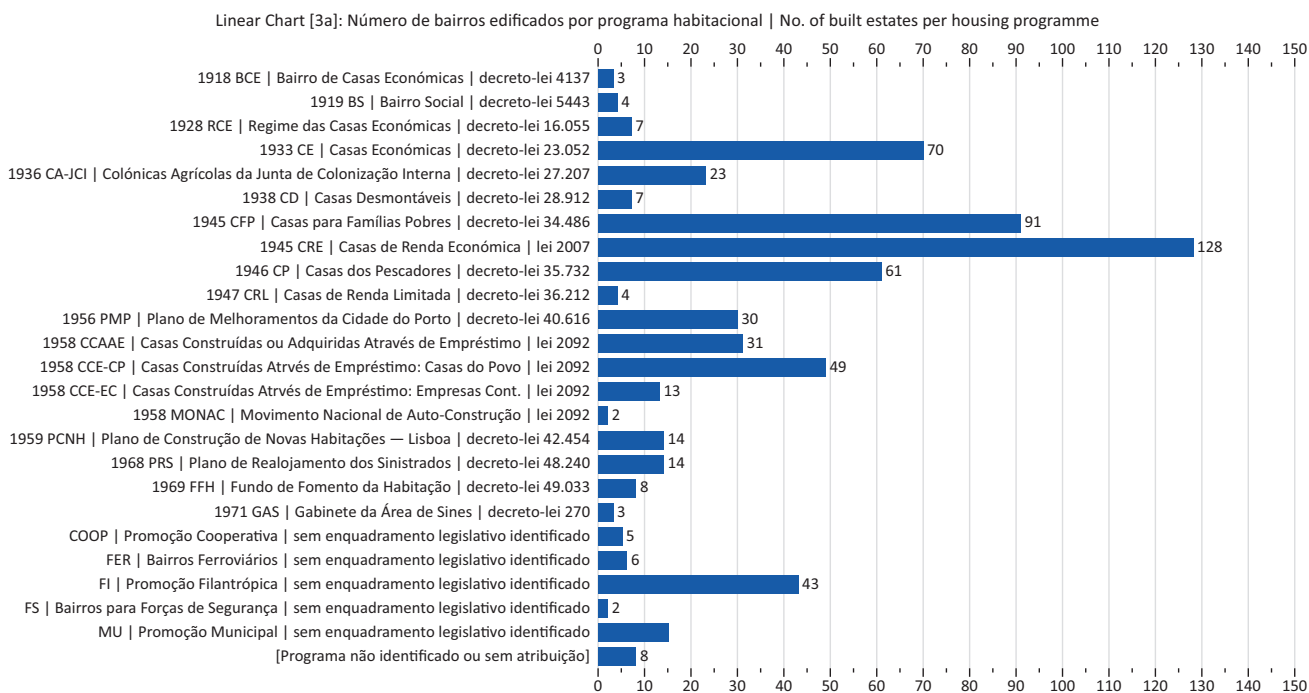


Figure 5. Linear chart with the number of built estates per housing programme. Note: The universe is composed of built estates and dwellings built between 1910 and 1974, included in the MdH database. Source: Ramos, Gonçalves, et al. (2019).

of 23 September 1933) was based on a rental-purchase principle (the monthly rent paid off the value of the house within 25 years), with the result that the buildings passed from the public to the private sector, even allowing for the apartments to be subsequently sold to other owners.

The rental-purchase system (Propriedade Resolúvel) presupposed a contract of conditional ownership, which allowed the state to sell the property, with the buyer also making a commitment to fulfil certain obligations, not only financial ones but also mostly those relating to family and moral behaviour, i.e., in keeping with a political ideology. If these conditions were not rigorously followed, the property could be lost, which happened in some cases (Silva & Ramos, 2015, p. 261). This system was mainly intended to create better conditions for access to property (Decree-Law No. 23052 of 23 September 1933) and was also used by the regime in other housing programmes and contexts. The system not only enabled the state to generate a class of small homeowners but also created the conditions to further extend these housing policies.

The authorisation to sell the homes built under the Affordable Houses programme came afterwards, in October 1975 (Decree-Law No. 566 of 3 October 1975), already after the end of the regime in April 1974. However, the “rent to buy” principle associated with this programme was only fully abolished in 1982 (Decree-Law No. 329 of 17 August 1982).

The rental dwellings built under the Affordable Rented Housing Programme (Law No. 2007 of 7 May 1945), despite not having been conceived originally

with this aim, could be acquired by the inhabitants in 1977, under the terms of a specific piece of legislation (Decree-Law No. 419 of 4 October 1977). The buildings originally constructed for rent were divided into autonomous units and transformed into a horizontal property regime at that time. However, this case differs from the previous one, since it clearly formed part of the state policy of selling off the national housing heritage, in keeping with an emerging neoliberal ideology. With these strategies, the state transferred the housing heritage both to banks with “interest subsidies” and to the private sector with the “financialisation” of the property market.

The Plan for Constructing New Housing in Lisbon (Figure 6) is also worthy of consideration, as it included three of the most extensive urban developments built in Lisbon in the early 1960s, namely the neighbourhoods of Olivais Norte, Olivais Sul, and Chelas. These interventions also revealed the influence of international practices: Olivais Norte followed the principles of the Athens Charter, Olivais Sul presented some brutalist features, and Chelas suggested the experiments of Alison and Peter Smithson’s Golden Lane (1952) and Robin Hood Gardens (1962–1972; Ramos, Gonçalves, et al., 2021, p. 11). This housing programme established a general plan for the construction of affordable rental housing in the city of Lisbon, which involved several housing developers (Agarez, 2018; Heitor, 2004; Ramos, Pereira, et al., 2019). In Porto, the Improvement Plan (1956) allowed for the construction of 14 neighbourhoods and more than 6,000 dwellings within 10 years. This public initiative was a significant process of socio-territorial transformation in the region (Queirós, 2016).



Figure 6. Neighbourhoods of Olivais Norte and Chelas: General views (Plan for Constructing New Housing, 1959). Notes: This double-page spread shows the neighbourhoods of Olivais Norte (buildings type IID, 1958–1960, reference a188 in MdH database) and Chelas (Pantera Cor-de-Rosa housing complex, 1972–1980, reference a534 in MdH database, and the Cinco Dedos housing complex, 1973, reference a536 in MdH database). In these pages, we can also find information about some bibliographical references. Source: Lameira and Rocha (2019, pp. 77–78).

Furthermore, some unexpected projects were initiated towards the end of the regime, such as the Agualva-Cacém estate (Figure 7), in Mira-Sintra, designed between 1965 and 1970. The Agualva-Cacém estate represents almost a new town prototype with different housing densities, urban equipment, and common green areas, built in an extensive territorial area (Ramos, Gonçalves, et al., 2021, pp. 11–12).

2.2. From 1974 to Early 2000s

The same architects who worked on the more recent housing programmes, such as the Affordable Rented Houses Programme (1945), and were more receptive to the modern architectural style, were called upon to develop new forms of housing and processes for the participation of residents, which in turn gave rise to the Local Ambulatory Support Service (Serviço de Apoio Ambulatório Local [SAAL]; Ministerial Order of 6 August 1974). This approach, strongly marked by the research that Nuno Portas (Dias, 2017) was already conducting at the National Laboratory for Civil Engineering, introduced specific subjects, namely self-construction, evolu-

NUNES, João Pedro Silva (2007). *À escala humana: planeamento urbano e arquitectura de habitação em Olivais Sul* (Lisboa, 1959-1960). Lisboa, Câmara Municipal de Lisboa.

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[s.n.]. (1966). "Viviendas economicas em Olivais-sul. Lisboa." in *Hogar y Arquitectura*, n.º 62, pp. 32-37.

[s.n.]. (1971). "Empreitadas de construção de edificios habitacionais e de equipamento no período de 1959 a 1969." in *GTH Boletim*, Vol. 3, N.º 20, Lisboa, Câmara Municipal de Lisboa, Gabinete Técnico de Habitação.

Bairro de Olivais Norte - Célula A - Cat. II [Fig. 50], 1957/1968 | Nuno Teófilo Pereira, Nuno Portas, António Pinto de Freitas.
GPS: 38.776181N, 9.116921W

Bairro de Olivais Norte - Edifício tipo IC, 1959 | João Brault Reis, João Matoso.
GPS: 38.775747N, 9.113916W

Bairro de Olivais Norte - Edifícios tipo IID [Fig. 52 e 53], 1958-1960 | Pedro Cid, Fernando Torres, Guimarães Lobato, Sommer Ribeiro, Pedro Falcão e Costa e outros.
GPS: 38.776376N, 9.114732W

Bairro de Olivais Sul - Célula C - Barras, 1958-1968 | Nuno Portas, Barbotomeu da Costa Cabral, José Maria Torre do Valle, Pedro Viera de Almeida, Rui Gamito (Eng.).
GPS: 38.765831N, 9.115313W

Bairro de Olivais Sul - Célula B - Cat. II - Lotes 29, 46 - Edifícios de Habitação de 7 pisos, 1960 | Vítor Figueiredo, Vasco Lobo.
GPS: 38.766580N, 9.121002W

Bairro de Olivais Sul - Célula C - Cat. I, 1960-1964 | Vasco Croft, Justino Moraes, Joaquim Casimira.
GPS: 38.764514N, 9.122760W

Bairro de Olivais Sul - Célula C - Cat. II - Lotes 192, 194, 240, 1960-1966 | Nuno Portas, Barbotomeu da Costa Cabral, José Maria, Rui Gamito (Eng.).
GPS: 38.766110N, 9.115676W

Bairro de Olivais Sul - Célula E - Cat. I - Lotes 438, 439, 440, 441, 443 e 444, 1964 | Nuno Teófilo Pereira, A. Silva Gomes, A. Freitas Leal, J. Correia Rebelo, Rui José Gomes (Eng.).
GPS: 38.761178N, 9.107312W

Bairros de Chelas - Conjunto Habitacional Pantera Cor-de-Rosa, Lotes 222 a 229 [Fig. 54 e 55], 1972-1980 | Gonçalo Byrne, António Reis Cabrita.
GPS: 38.760081N, 9.124202W

Bairros de Chelas - Conjunto Habitacional Cinco Dedos, Lotes 247 a 253 [Fig. 49] | Vítor Figueiredo, Eduardo Telo Sousa, Jorge Gil.
GPS: 38.755582N, 9.120752W



Fig. 49 Bairros de Chelas - Conjunto Habitacional Cinco Dedos [© Gisela Lameira]



Figure 7. Agualva-Cacém affordable housing estate in Mira-Sintra, 1965 (reference a267 in MdH database). Photograph by © Tiago Casanova. Source: Ramos, Gonçalves, et al. (2019).

successive changes and a major restructuring in 1985, which oriented the programme towards the guidelines of Controlled Cost Housing (*Habitacões a Custos Controlados*), with the purpose of decreasing the action of the state and enabling renters to purchase their own houses (Antunes, 2019, p. 11).

The construction of Controlled Cost Housing began in the 1980s, with homes being built both for sale

(Decree-Law No. 220 of 26 May 1983) and for rent (Decree-Law No. 110 of 17 April 1985). Among the promoters were the Housing Cooperatives (*Cooperativas de Habitação* Decree-Law No. 730 of 20 December 1974 and Decree-Law No. 737-A of 23 December 1974), through access to special housing credits. The cooperative system includes both individual and collective properties, given that, in the second case, the dwellings can



Figure 8. SAAL in Bouça Estate (Porto). General views in 2013: Phase 1, 1973–1978 (reference a826 in MdH database).

remain as the property of the cooperative. The Housing Cooperatives contributed to the construction of hundreds of complexes around the country, with São Mamede Infesta (1985), Matosinhos (1979–1984), and Contumil (1979–1986) representing some of the more relevant examples in the north of Portugal.

Subsequently, in 1993, the Special Rehousing Programme (SRP; Programa Especial de Realojamento Decree-Law No. 163/93 of 7 May 1993) was introduced, with the aim of eliminating the slum areas existing in Metropolitan Areas of Lisbon and Porto and providing conditions for the relocation of the residents in these low-cost homes. As a result, this programme had a substantial impact on the social and territorial development of these metropolitan centres. For the development of the SRP, contracts were later made between municipalities, the National Housing Institute (Instituto Nacional de Habitação) and the Institute for the Management and Sale of the State Housing Heritage (Instituto de Gestão e Alienação do Património Habitacional do Estado; Antunes, 2019, p. 12). In 2003, the SRP was revised (Decree-Law No. 271/2003 of 28 October), being particularly notable for its promotion of urban rehabilitation instead of the acquisition or construction of new housing. Later, in 2004, PROHABITA (Decree-Law No. 135/2004 of 3 June) emerged, being developed through agreements between municipalities and the National Housing Institute. However, unlike the SRP, this programme served the entire national territory. This programme was also notable for favouring the rehabilitation of existing buildings over the creation of new constructions and underlining the importance of improving the energy efficiency of social buildings (Antunes, 2019, p. 12).

Currently, the state even financially supports the construction or purchase of Controlled Cost Housing, both for permanent use and under rental conditions. These houses must comply with the specific requirements imposed by Ordinance No. 65/2019 of 19 February, which incorporates the objectives of the New Generation of Housing Policies, approved by the 21st Constitutional Government (Council of Ministers Resolution No. 50-A/2018, of 2 May). The main changes introduced by the new legislation include rehabilitation, rental housing at reasonable costs, principles of environmental sustainability, and support spaces for living (Ordinance No. 65/2019 of 19 February).

The government approach to the housing problem has involved progressive investment in the construction industry, leading to the building of homes through special financing policies, as can be seen, for example, in the Council of Ministers Resolution of 24 February 1976, which established one of the first versions of a subsidised credit regime for homeownership. However, this regime was rapidly abolished, and in 1983 the subsidised credit (*crédito bonificado*) system was introduced (*Diário da República*, No. 7/1983, Series II of 10 January). These subsidised credit support measures thus gradually replaced

the public promotion of controlled cost housing until they were abandoned in 2002.

Following the crisis in the construction market and the growing demand for rented accommodation, in 2006 the New Urban Rental Regime (“Novo Regime do Arrendamento Urbano”) was created, with the aim of establishing a special regime for updating old rents (Law No. 6/2006 of 27 February). However, recurrent problems in the urban rental market, such as the difficulties in undertaking rehabilitation works on rented properties or the protracted nature of eviction processes, led to further revisions of the law in 2012, 2014, and 2017. During this period, other programmes and initiatives for rental accommodation emerged, such as Door 65 (Porta 65) for young people (Decree-Law No. 308/2007, of 3 September), the Social Rental Market (Mercado Social do Arrendamento, 2012), and the Rehabilitate to Rent (Reabilitar para Arrendar, 2013) programme.

Most of the financing and promotion of state-subsidised housing in Portugal is regulated by the Portuguese Institute for Housing and Urban Rehabilitation (Instituto da Habitação e Reabilitação Urbana). This public institute—officially created through Decree-Law No. 207/2006 of 27 October—is also responsible for managing and providing maintenance for the existing social housing stock, as well as for promoting and putting into practice public policies relating to accessible housing solutions.

Together with the government and specialised teams, the Portuguese Institute for Housing and Urban Rehabilitation developed the *Strategic Housing Plan 2008–2013* (Guerra et al., 2008) and the *National Strategy for Housing* in 2015 (Council of Ministers Resolution No. 48/2015 of 15 July). These documents reflected the goals and guidelines of housing policies in these periods, most notably the progressive investment in the use of existing buildings through incentives for urban rehabilitation and the growing interest in boosting the rental market.

3. Contemporary Strategies: Public Housing Programmes in Force in Portugal

Given the current housing crisis in Portugal, several programmes have been implemented as a result of the New Generation of Housing Policies. These programmes are directed at different fringes of the population (young people, middle classes, the poorest strata of the population, landlords, investors, and people who want to move to the countryside), targeting several types of solutions for rental housing, refurbishment, urban regeneration, etc.

The Basic Housing Law (Law No. 83/2019 of 3 September) promulgated on 6 August is also a reaction to the shortage of affordable housing solutions, addressing the need to guarantee the role of social housing and to promote its access through rents based on the specific incomes of families.

Financial support or subsidies for rental models (instead of ownership) and rehabilitation strategies are the most notable instruments for the promotion and management of housing. The same discussion has centred on policies for the refurbishment of the current housing stock and new regulations.

The approved regulation of the New Generation of Housing Policies (Figure 9) defines several programmes that represent clear shifts in housing policies compared with the ones that were in force until the early 2000s:

- a) From a policy centred on the supply of public housing for the most deprived to a policy oriented towards universal access to adequate housing.
- b) From a housing policy whose main instruments were based on the construction of new accommodation and support for the purchase of a home to a policy that favours rehabilitation and rental.
- c) From a housing policy centred on “houses” to a policy that places “people” at its centre.
- d) From a centralised and sectoral policy to a multi-level, integrated, and decentralised model of participatory governance.
- e) From a reactive policy to a proactive policy, based on shared information and knowledge and on the monitoring and evaluation of results (Council of Ministers Resolution No. 50-A/2018 of 2 May).

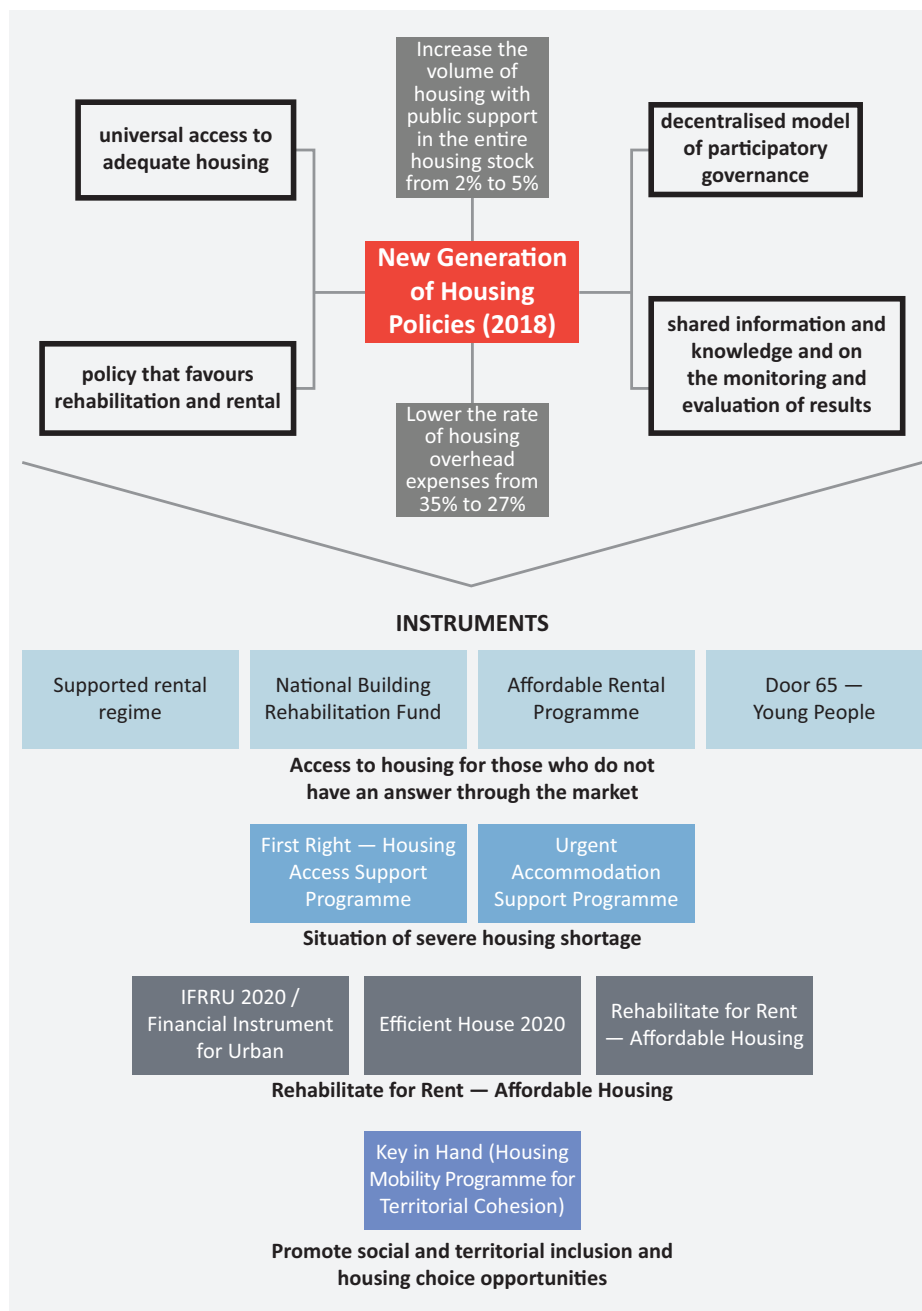


Figure 9. New Generation of Housing Policies (2018): Goals, principles, and key instruments.

Another clear shift is the setting of quantitative targets to be reached in the medium term:

- a) Increase the volume of housing with public support, in the entire housing stock, from 2% to 5%, which represents an increase of about 170,000 dwellings.
- b) Lower the rate of housing overhead expenses from 35% to 27% (Council of Ministers Resolution No. 50-A/2018, of 2 May).

In order to achieve these goals, the following strategic objectives are pursued, and the following instruments adopted:

- a) Respond to families that live in a situation of severe housing shortage:

- First Right—Housing Access Support Programme (1º Direito—Programa de Apoio ao Acesso à Habitação; Decree-Law No. 37/2018, of 4 June): According to the Housing Portal, “First Right—Housing Access Support Programme seeks to support the promotion of housing solutions for people who live in undignified housing conditions and who do not have the financial capacity to bear the cost of access to adequate housing. The Programme is based on a promotional dynamic predominantly aimed at the rehabilitation of buildings and their subsequent rental. It also invests in integrated and participatory approaches that promote social and territorial inclusion, through cooperation between sectoral policies and bodies, between central, regional and local administrations and between the public, private and cooperative sectors” (Portal da Habitação, 2019a).
- Gateway—Urgent Accommodation Support Programme (Porta de Entrada—Programa de Apoio ao Alojamento Urgente).

- b) Guarantee access to housing for those who do not have an answer through the market (among other instruments, such as instruments to promote security and stability in rented accommodation, supply capture instruments, and price and housing accessibility indicators):

- Affordable Rental Programme (Programa de Arrendamento Acessível Decree-Law No. 68/2019 of 22 May): Like the Controlled Rent Housing Programme, implemented in 1947, the Affordable Rental Programme is designed to promote the supply of rented accommodation at prices below the market rate. This housing programme recognises as

a priority the need to respond to new housing needs. It has been extended to populations with intermediate incomes who are currently unable to access adequate housing in the market without this involving an excess burden on the family budget, as stated in the implemented regulation.

- Door 65—Young People (Porta 65—Jovem; Ordinance No. 4/2018 of 4 January; Law No. 87/2017 of 18 August). According to its platform (Portal da Habitação, 2019b), the “Porta 65—Jovem” programme is a system of financial support for rental accommodation taken out by young people and is regulated by a set of legal diplomas. It seeks to regulate incentives for young tenants, living either alone or in cohabitation, encouraging the stimulation and promotion of the rental market and the rehabilitation of degraded urban areas. This programme supports the renting of residential houses, allocating a percentage of the rent as a monthly subsidy.
 - Supported Rental Regime (Regime do Arrendamento Apoiado Regulation No. 84/2018 of 2 February; Law No. 32/2016 of 24 August). The Supported Rental Regime is applicable to dwellings owned by the state or local authorities, with rents being calculated according to the income of the households for which they are intended.
 - National Building Rehabilitation Fund (Fundo Nacional de Reabilitação do Edificado; Council of Ministers Resolution No. 48/2016 of 1 September).
- c) Make rehabilitation the main form of intervention at the level of buildings and urban development (among other actions: strategic urban development plans, urban rehabilitation action plans; strategic urban development plans, integrated action plans for disadvantaged communities; urban rehabilitation programme for social housing districts (energy efficiency); rehabilitation project as a rule; measures to promote regular maintenance and full use of the building):
 - Rehabilitate to Rent—Affordable Housing (Reabilitar para Arrendar—Habitação Acessível): According to its online portal and regulations (Instituto da Habitação e da Reabilitação Urbana, 2019), the programme seeks to finance the rehabilitation of buildings of 30 years or more, which, after rehabilitation, should be used predominantly for housing purposes. These fractions are intended for letting on a controlled rent basis. Decree-Law No. 175/2012 of 2 August (Basic Law of Portuguese Institute

for Housing and Urban Rehabilitation); Decree-Law No. 307/2009, in the wording given by Law No. 32/2012 of 14 August (Legal Regime for Urban Rehabilitation) and by Decree-Law No. 136/2014 of 9 September; Law No. 80/2014 of 19 December (Controlled Rent Regime); Decree-Law No. 53/2014 of 8 April (Exceptional Regime for Urban Rehabilitation).

- Financial Instrument for Urban Rehabilitation and Revitalisation (IFFRU 2020), seeking to support building rehabilitation and to promote energy efficiency.
- Efficient House 2020 (Casa Eficiente 2020), which proposes a system of repayable loans to private individuals (owners or tenants) for the development of interventions in residential buildings that promote environmental sustainability, mainly through the improvement of energy and water efficiency and the management of urban waste.

d) Promote social and territorial inclusion and housing choice opportunities:

- Housing Mobility Programme for Territorial Cohesion “Key in Hand” (Chave na Mão; Notice No. 14754/2019, regulation in public consultation process) allows families residing in territories subjected to strong urban pressure, who wish to move their residence to low-density territories, to make their homes available at affordable rents.

4. The Housing Challenges Facing Portugal in the Next Few Years

The challenges that Portugal has had to face over the last five years have been huge, and only at the beginning of 2020 did the instruments of the New Generation of Housing Policies, defined in 2018, begin to be implemented. Some of the most recent programmes, such as the Affordable Rent Programme, implemented in

2019 (Decree-Law No. 68/2019 of 22 May), are already being questioned as a way of bringing these instruments closer to the specific needs of each territory (Travasso et al., 2021).

The housing crisis was naturally aggravated by the Covid-19 pandemic, which not only highlighted the shortage of housing solutions, but has mostly underlined the lack of architectural quality of the current housing stock, with evident deficiencies in terms of comfort, salubrity, liveable areas, access to the exterior, etc. (Century21 Portugal, 2021).

Housing has a significant impact on healthy living and the ageing of the population, so it is expected that, over the following years, the question of housing “affordability” in Portugal will be further confronted with a series of assorted factors, such as an ever-larger older population (Figure 10) and the need to consider the house as a sustainable and adequate asset in the long term (European Commission, 2017).

4.1. Ageing in Place and Lifelong Housing Challenges

As the population grows older, social policies are beginning to shift from the provision of institutionalised care to keeping the elderly in their homes as a healthy solution for the ageing problem (Fernández-Carro, 2013; Mestheneos, 2011). New challenges for the housing market and housing design can therefore be expected to appear (Carvalho, 2018; Matias, 2016), namely the need to provide adequate housing to all households, in view of the discrepancies between the demographic changes and the housing stock available in Lisbon (Garha & Azevedo, 2021). Although a National Strategy for Active and Healthy Ageing has already been defined for 2017–2020 (proposal by the Interministerial Working Group, Order No. 12427/2016, still not in force in 2022), it does not focus on built environments or housing requirements in the near future. Nevertheless, this strategy was recommended for update and subsequent approval in the Resolution of the Republic Assembly No. 146/2021.

Major changes in housing policies in this area, which have already been introduced in other countries over the

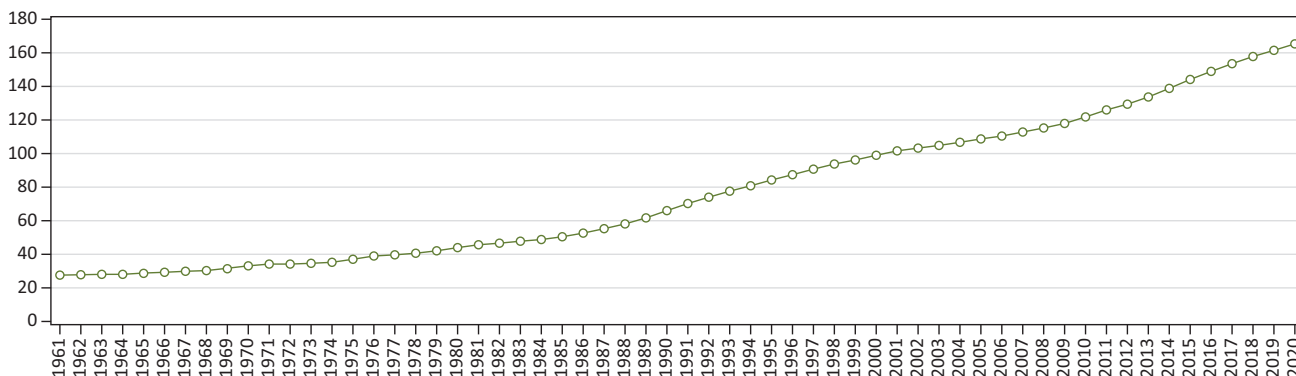


Figure 10. Ageing index per year (ratio %). Source: PORDATA and Fundação Francisco Manuel dos Santos (2021).

last few decades (Lifetime Homes Standards, UK; Lifelong Housing, USA) require a necessary revision of the current legal framework in Portugal and call for the involvement of a wide range of different stakeholders, namely the government, planners, housing promoters, builders, estate agents, the financial system, and the tenants or buyers of the dwellings.

Overall, future discussions of this question must be centred on the house as an asset that can meet the needs of inhabitants in the long run, considering specific or permanent changes in the circumstances of their daily lives (Mosca et al., 2019).

This means that, from the point of view of housing design, a series of extra capabilities must be considered, in addition to the question of the improvement of accessibilities, which has been regularly addressed in Portuguese legislation since 2006 (namely, Decree-Law No. 163/2006 approves the accessibility regime for buildings and establishments that receive the general public, public roads, and residential buildings; Decree-Law No. 125/2017 updates to the previous decree-law; Ordinance No. 301/2019 defines the design methods for improving accessibility for people with reduced mobility in existing residential buildings). This approach includes: the development of manuals of good practices, checklists, and lifelong housing certification models; services for analysing architectural and urban projects; and reports on recommendations for housing policies. It is essential to emphasise the need for a holistic perspective in housing design and intervention on the built fabric, not isolating problems and solutions. Thus, this vision implies globally re-analysing the house, particularly the questions of accessibility and energy efficiency, while also viewing integration in local communities as essen-

tial for an inclusive architecture that offers a better quality of life.

4.2. Energy Efficiency Retrofit in Social Housing Districts

Some of the issues relating to the improvement of the energy performance of buildings and the promotion of sustainable cities were already mentioned in the legislation of the New Generation of Housing Policies (Governo da República Portuguesa, 2017). Under the scope of such rehabilitation, the plan proposes a set of policy instruments, with an emphasis on the Urban Rehabilitation Programme in Social Housing Districts (Energy Efficiency), which supports interventions in affordable housing buildings aimed specifically at energy and environmental issues. This legislation also covers the remaining housing ensembles with instruments such as Efficient House 2020, which promotes interventions associated with energy and water efficiency and an improvement in urban solid waste management (Governo da República Portuguesa, 2018; idealista, 2018). However, this project only provides special conditions for loans, mainly promoting a partnership network between the Portuguese State, national banking entities, and private civil construction companies.

These themes are gaining increasing importance and attracting greater government attention, which is reflected in the current incentives and aiming for results (Figure 11; ADENE, 2018). An example is the Support Programme for More Sustainable Buildings, which consists of a contest launched on 7 September 2020 for the financial support (maximum 70%) of small interventions in houses dating from before 2006 (Order 6559/2020 of 23 June; Order 6070-A/2021 of 21 June).

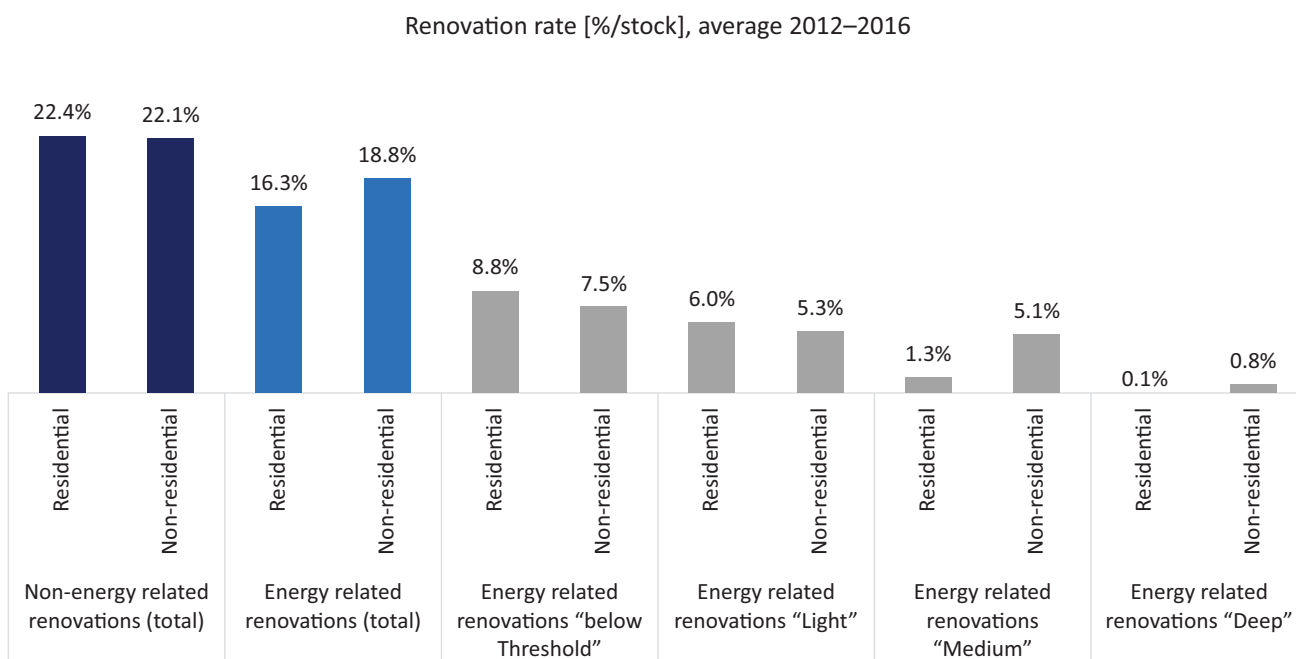


Figure 11. European Commission final report: Portugal’s data, 2012–2016. Source: European Commission (2019, p. 175).

This programme is designed for private owners and seeks to improve the energy efficiency of buildings.

Furthermore, with the aim of improving energy performance in buildings, new legislation was recently introduced through Decree-Law No. 101-D/2020, which transposes the EU Directive 2018/844 and part of the EU Directive 2019/944. This document establishes the requirements for NZEB buildings—buildings with high energy efficiency and low/almost zero energy consumption needs, which are covered by renewable energy sources.

In this context, it is essential to reinforce the adoption of measures relating both to the type of construction (social) and to its geographical and climatic conditions. The transposition of Central European standards to the national reality does not necessarily represent an improvement in housing.

5. Futures Past: Final Notes

“Futures Past” is an expression inspired by Koselleck’s (1979) and Lowenthal’s (1985) books. This short 100-year overview of housing policies and discussion of the term “affordable” underlines that the housing issue has been a “political weapon” throughout history and continues to be so nowadays. A review of the different housing promotion initiatives throughout the 20th century reveals that the current housing crisis can only be resolved through strong state support for municipal housing development, as shown by the results obtained between 1910 and 1974 (Ramos, Gonçalves, et al., 2021). Municipal initiatives, such as the houses built under the Improvement Plan for the City of Porto (1956), and the plan for the construction of new housing with affordable rents (Decree-Law No. 42454 of 18 August 1959), implemented in Lisbon, provide strong evidence that state support for the development of municipal housing is a powerful solution for overcoming housing crises. Such support does not need, however, to involve the construction of public housing (or housing financed 100% with public funds), and can be applied in other ways.

The question of “affordable housing” has never been related solely to solving the problem of housing shortages for the most disadvantaged classes in society, since, throughout the 20th century, there were several initiatives aimed at an emerging middle class, such as the Affordable Housing Programme (1933) or the Controlled Rent Housing Programme (1947), for example. Moreover, it should be stressed that, in Portugal, at that time, several solutions were tested as a way of promoting housing and homeownership, ranging from renting to resolvable income (for 25 years), or the financing of house building initiatives based on the ownership of the residents (housing cooperatives, for example) or direct purchase (state-subsidised credit).

Nevertheless, during this long period of time, there were clearly some ideological changes introduced in terms of housing policies, underlining the shifts that

were taking place in the role of the welfare state (P. R. Pinto, 2009). This phenomenon can be clearly observed in the strategies that were implemented to encourage house purchases from the late 1970s until 2002. Nowadays, different strategies are being pursued, as has already been described.

A general overview of the current implementation of the housing policy defined by the government, namely the preparation of legislative and regulatory projects, clearly shows that the focus is on four integrated sectors: housing, urban rehabilitation, rented accommodation, and the management of the housing heritage.

The most evident change in the past 20 years, especially after the revision of the SPR, in 2003, and the implementation of PROHABITA, in 2004, has been the extension of the scope of action to rehabilitation, instead of new housing construction, and, most of all, to invest in rental solutions instead of homeownership. It should also be noted that, during the 20th century, the state promoted the construction of affordable housing, with a limited number of organisations being particularly prominent, namely the Housing Fund. Nowadays, however, the government is investing in the diversification of the different bodies involved, the instruments and financing models, as stated in the New Generation of Housing Policies.

Certain initiatives began to gain momentum in the late 1980s, especially Cooperative Housing. In this case, the state’s investment ended up translating into a profit for the owners, who, once the period during which they were prevented from selling their houses had expired, ended up placing them on the real estate market.

Another controversial housing measure in Portugal that ended in September 2002 was the Subsidised Credit Regime, associated with the process of the financialisation of the housing market already mentioned in Subsection 2.2, which is nowadays only available to citizens with disabilities. Public investment in the acquisition of new housing, through subsidised credits, resulted in massive investments being made by the state, which are still being paid for in the annual state budget. This policy also seems to have left many households hostage to mortgages, a situation that, in times of crisis, has resulted in dramatic problems of non-payment, forcing the state to intervene with a moratorium of the debts, in order to prevent the loss of the house and the insolvency of certain banks. The following years witnessed a change in housing strategies, which resulted in a greater investment in rented accommodation and the progressive promotion of rehabilitation, rather than incentives for homeownership.

The Covid-19 pandemic has led to the emergence of a number of new themes, such as “healthy housing,” naturally related to the questions of “ageing in place,” “lifelong housing,” and “energy efficiency retrofits.” It is expected that in future years, in Portugal, the term “affordable,” which is currently understood as generally meaning “accessible” (i.e., something that an ordinary

citizen can rent or buy), will broaden its meaning to include adaptability, accessibility, ageing, independent living, and other related concepts. Finally, it is essential to state that thinking about affordable, inclusive, sustainable, and lifelong housing is also a matter of intergenerational justice (Fundação Calouste Gulbenkian, 2019).

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Conflict of Interests

The authors declare no conflict of interests.

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