

The urban rent in the multicultural city: retail shops, migrants and urban decline in the historic centre of Palermo

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Abstract

Changes in consumer shopping behavior and in retail spaces, such as shopping malls, department stores and e-commerce, have modified localization models of traditional retail shops, also affecting urban fabric and spatial distribution of urban rent. Even city centers have undergone significant transformations or even decline, especially if local economic system and real estate market are weak and recessionary. A significant amount of commercial properties may have long vacancy due to excess supply, since many traditional shops close their business because they are no longer competitive and, moreover, there is no immediate takeover by new tenants.

The decline of central urban areas depends on the interaction of multiple economic, social and cultural

factors, but it can be countered by urban policies oriented not only to physical redevelopment of urban fabric, but also to social cohesion and multiculturalism. Migrants bearers of varied cultural values, coming from different continents and settling permanently in the Italian cities, have rented some of these empty properties by locating retail shops specifically oriented to their own communities or also to the citizens needs. The presence of migrants contributes, indeed, to support the retail real estate demand, to mitigate the minus-valorization of real estate capital and also to contain the revenues contraction. This phenomenon has been analyzed in some streets of the historic centre of Palermo that are traditionally shopping areas and have become the privileged place for locating retail shops managed by immigrants.

1. INTRODUCTION

As a complex effect of economic globalization process, the spreading of new forms of retail and other services (like shopping mall and, more recently, e-commerce websites) deeply etches on the transformation of cities and urban regions. This occurs both from the perspective of commercial real estate market and urban development, with implications involving residential localizations and multicultural relationships.

Especially in geographic areas marked by a weak economic structure and by housing-market stagnation, new retail modes have caused socio-economic polarization phenomena and have contributed to commercial fabric decline also in urban central areas, as occurred in many Sicilian towns. Particularly in the historic centre of Palermo, this decline has favoured the permeability to localisation of migrants' economic activities that are usually nearby to their housing (Bonafede and Napoli, 2016; Forte et al., 2018).

Although in recent years a greater influx of migrants has interested the intensively cultivated areas of rural Sicily, the metropolitan cities of Palermo, Messina and Catania remain indeed the main poles of attraction for the migration flows because of a major concentration of work opportunity, mostly in jobs of retail and domestic care (Todaro, 2018).

Caused by the same global dynamics, the migration flows actually challenge cities and regions from multiple perspectives, especially from the viewpoint of building new intercultural development models. Amongst other involved social and economical policies, these people transnational flows emphasize many cultural contradictions also in town planning (Sassen, 1996 and 2001; Sandercock, 1998 and 2000), which often interacts with different studies (anthropological, ethnographical, post-colonial and geographical) in order to incisively explore the territories of differences and their rights (Appadurai, 2001; Baroni, 2013; Holston, 1998; Young, 1990; Soja, 2007; Scott, 2011).

Alternatively to proliferation of contacts, public spaces and virtual markets, the choices of immigrants' location in degraded urban areas, where housing and shops are inexpensive, can be considered as opportunities for a kind of urban revitalization that is instead anchored on the multicultural relationships and the city material space.

From this perspective, the research aims at investigating in which terms the presence of migrants helps to sustain commercial real estate demand and contain annuities decrease, by analysing the case of the historic centre of Palermo in a frame of interdependent effects by the proliferation of mega stores or malls in other parts of the city and by the spread of e-commerce in the virtual space.

In addition, the study underlines the multicultural values emerging by the slow building process of public space as a result of social interactions, which are rooted in the

urban fabric, in comparison with the closed and predetermined space of the malls.

2. GLOBAL TRADE AND URBAN SPACE

The complex relationships among social communities (which differ for income, cultural models, geographical origins), places (centre and centrality, periphery and marginality) and functions (complementary, synergistic and conflicting) are subjected to continue tension between change and persistence where city resilient capabilities allow it to modify itself while maintaining its own identity.

The locational patterns of commercial activities have always been an integral part of the urban structure, from the market-square in the city centre to the shopping malls, which transform urban peripheries or the areas out of town into place dedicated exclusively to consumption.

Emblems of globalized trade, shopping malls were born in US, in the 1920s, and developed in Europe, starting by the 1970s; they have largely spread because of the supply of goods at low prices and initially settled in urban central areas with multilevel buildings (Moccia and Sgobbi, 2013).

At the beginning of new millennium, the new models have evolved into increasingly extensive and complex facilities localized in peripheral areas as nodes of a large scale infrastructural network, serviced by huge parking lots, wide roads and highway junctions.

In addition to main areas dedicated to retail (Gross Leasable Areas), during this evolution, further areas have been added in order to play different functions as leisure and cultural entertainment (mainly kids' play-areas and cinemas), sports (small gyms), meetings (conference rooms), services (bank and post office) and catering (bar, restaurants and fast food areas).

The attempt is to build ex novo a new polarity in peripheral position where there is a concentration of several activities which are usually dislocated in different public spaces of downtown (streets, squares and galleries), while in the malls these latter become private spaces open to the public fruition for the sole purpose of supporting the consumption activities.

In this kind of globalized spaces, the flattening and homogenising of relational skills (Augé, 2009) have fed a renewed critical reflection on the concept of public space and its contraction in favour of privatization.

The new shopping malls have been defined as "pseudo public spaces" (Giampino et al., 2017) because they compensate the lack of meeting places as an outcome of behaviours and predetermined spatial models rather than being a social "social construct" as it should result from a social interaction process (Crosta, 2000).

They were also called "non-places" since do not interact with the surrounding landscape and urban space and represent one of the forms of "city-world" without history neither identity (Augé, 2009).

The mall indubitably attracts vastly different kinds of people and generations and especially during the weekend can be considered as one of “urban glamour zones” not only in the network of main global cities (Sassen, 1996, 2001), but also in the globalized outskirts. In any case, this sort of attractive and trendy market implies high costs for its maintenance and sometimes has really short life.

In the United States, from some time the phenomenon of dead malls has already appeared and has been studied in order to understand the reasons of their decline and to intervene with sustainable redevelopment projects (Moccia and Gobbi, 2013).

However, the reconversion interventions of malls (de-malling) have been implemented in a paradoxical way: by rebuilding historical settlement models, with their typical functional mix (residence, offices, shops and activities of leisure) of the urban fabric, and by restoring the trade spaces according to persistent modes from centuries, such as the open air markets and shops along the streets. From this perspective, also some extremely large car parking lots have been reconverted in public parks, with remarkable expenditure for restoring the vegetable soil.

In Sicily, the shopping malls spread late compared to other Italian regions and were sometimes overshadowed by suspicion to be a means for recycling the proceeds of dubious economic businesses. (Cannarozzo, 2009; Bazzi, 2012). The malls were indeed built in Sicily during a critical economic phase, when the reduction of public expenditure pushes the municipalities to decline their urban redevelopment policy in favour to a founded strategy on private actors’ financing. Especially in Palermo, these big structures have been localized near historic rural villages and Public Housing outskirts neighbourhoods marked by high rates of social hardship (high unemployment, widespread school drop-out and low income levels).

Touted as panacea for renewing areas with social exclusion risks and to compensate the lack of public facilities and services, the three main shopping malls in Palermo (“La Torre” in Borgonuovo district, “Conca d’Oro” in the Zen neighbourhood and “Il Forum” in Brancaccio district), were built since 2006, as variant to urban plans and after other negotiation programs between the municipality and private investors. The latter were involved on the creation of collective interest facilities, which however do not always have been constructed or have proved to be inappropriate for the local inhabitants’ needs (Bonafede and Lo Piccolo, 2007; Abbate and Orlando, 2009).

This choice to localize malls in urban peripheries not only eroded large extensions of agricultural land – sometimes featuring cultures of environmental value – interrupting potential ecological continuity and social links among different parts of the city (Bonafede and Schilleci, 2009; Marotta and Schilleci, 2016), but it also caused negative impacts on the “natural” shopping centres that had shapened over time, especially in the historic city centre. The

malls localization generated phenomena of disorientation with respect to the surrounding landscape of citrus and to the minute proportions of rural villages. In addition the great dimension of malls has really caused the decline of retail, which was traditionally dislocated in various shops or in open-air markets of the urban fabric and particularly of the historic centre, with controversial consequences regarding the real increase of employees in the trade sector, publicized as one of obtained benefits¹.

3. URBAN SPACE AND MIGRANTS

The undoubtedly negative repercussions on retail mainly happen in the historic centre of Palermo, in conjunction with the ineffectiveness of urban recovery policies that have failed to adequately support the low-income householders and small property owners (Bonafede and Napoli, 2015), by negatively impacting on the maintenance of urban fabrics, their economic values and their vivacity.

The emptying of the tertiary functions of important axes, such as that of via Roma and via Maqueda, as well as the decline of some historical markets (e.g. Vucciria market), have nevertheless offered new opportunities for intercultural relationships. This kind of economic decline has activated in fact slow replacement processes (or filtering phenomena) in the spaces left by residential and commercial activities abandoned by the “Italians”, which have facilitated the migrants concentration, coming from different countries, in the historic city centre.

In periods of continuing economic crisis, immigrants have therefore contributed to keeping the buildings of the historic centre in use, to supporting the demand for residential and commercial properties, by attenuating the transformations of the real estate market (Napoli et al., 2016a; Napoli et al., 2017a; Ciuna et al., 2017) and the difficulties in identifying cost-effective alternative uses (Napoli, 2015), resisting sometimes to sporadic and fragmentary gentrification processes (Bonafede and Napoli, 2015).

This resilience of the multicultural city, understood as the ability to respond to urban crises by keeping the system in balance with innovative methods, has been investigated not only in terms of market values of real estate capital, but also with regard to the values attributed to the processes of creation of public space and private space for public use.

The variegated system of shops that migrants offer to their communities and which, at the same time, are addressed to all the citizens are indeed opportunities for aggregation and cultural interaction and contribute to constitute “the

¹ A study finds that in Palermo, from 2006 to 2012, in the face of an increasing number of new employees of shopping malls, the total number of operators in the trade sector decreases (thesis of U. Pera, a.a. 2013/14, supervisor G. Bonafede).

eyes of the road”, ensuring even greater security. Conversely, the numerous reception and training services to support immigrant groups in the historic city centre, such as the Astalli Center and Santa Chiara, become crossroads for solidarity events, reinforcing cultural interactions.

If public space is pre-eminently a relational space (Arendt, 1958) and is a “construct” (Crosta, 2000) that is the outcome of a social interactions construction in time and in urban material space (rather than a pre-packaged product), then the way in which the historic centre of Palermo becomes permeable to residential and commercial activities offered by migrant groups expresses, in our opinion, the beginning of a process of building of multicultural values that are to be safeguarded with suitable policies. The network of interactions, in fact, has already created a public space, where differences recognize and respect each other and a mutual learning process occurs.

4. RENT AND RETAIL REAL ESTATE

City is the privileged place of exchange of not only purely material goods but also of monetary, symbolic, cultural, ethical and aesthetic values. The monetary form of the city (Rizzo, 2003) corresponds to the spatial organization of rent and constitutes the translation of urban hierarchies, centrality and polarity into monetary values, according to economies of agglomeration, as well as to different levels of accessibility and potential interaction that characterize each urban area (Camagni, 1992). Given that the supply curve of urban real estate is rigid in the short term because it depends on the provisions of urban planning, prices may change in the medium-long term only if real estate quantity varies due to the drafting of new plans or also projects of urban redevelopment notwithstanding the current plans.

The construction of shopping centers has led to a significant increase in the offer of retail properties in local urban markets where there has been a significant reduction in demand of traditional shops. This contraction subsequently extended to the retail spaces in the same shopping centers is causing long vacancy of leased buildings and strong minus-valorization of many properties for sale.

The spread of global e-commerce, moreover, by moving the purchase of many types of goods from a physical place of the exchange (shop) to an abstract site (website), has caused many traditional shops in financial difficulties to close due to reduction of consumption level. Intensification of economic competition has decreased goods prices and thinned profit margins, and consequently has also negatively affected the affordability of rents (Damesick, 2001).

Retail properties have different levels of income and capital value risks related to multiple factors: type of trading, urban location, size and rank of the city, size of

catchment area of potential users, technological characteristics of the building (size, state of preservation, constraints, etc.).

As a countermeasure to this decline and in order to remain economically competitive, some international brands are proposing unique and personalized sensory experiences to attract the consumer into the physical place of the stores and move him away from the impersonal purchase on the websites. In these cases the demand for retail real estate is strengthened even if this trend concerns mainly the “high streets” shopping, that are the urban place in which low-budget or high-end clothing chains (high fashion or high tech) and multi-brand stores are concentrated.

Although e-commerce tends to reduce the number of trips to the city center (and to the shopping centers too), some studies have verified that if the city center is perceived as an attractive place both in terms of convenient prices and good accessibility, many citizens (and customers) are encouraged to buy in the center rather than through websites (Weltevreden and von Rietbergen, 2006). This is an encouraging result for urban policies aimed at enhancing historic centres and supporting the location of retail shops.

In recent years, there was in Italy a considerable increase in the Number of Normalized Transactions (NTN) of retail real estate, although trade intensification has not yet triggered systematic increasing prices.

The analysis of the OMI data regarding NTN and average prices (2018 Report on 2017 data) shows a diversified framework, when we compare the national and regional average variations with those relative to some capital cities (Fig. 1). It happens because the resilience degree of the local real estate markets, which are subjected to internal and external instabilities, depends on the peculiar combination of micro and macro economic and micro and macro territorial factors and provides different results.

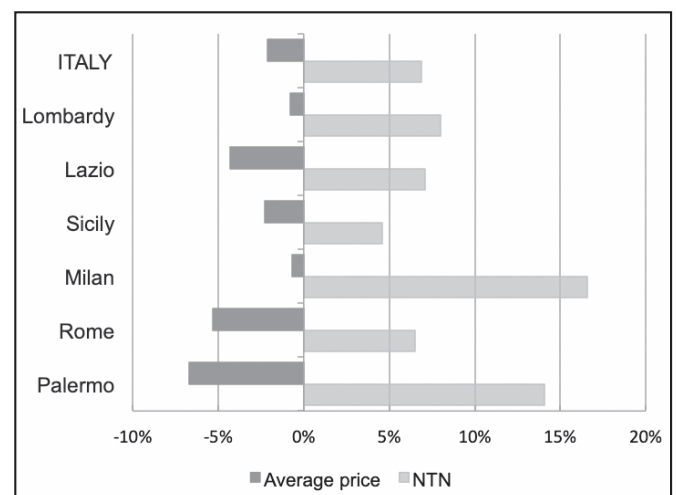


Figure 1 - Variation 2016-2017 of average prices and NTN (our elaboration on OMI data).

Against a +6.9% national average NTN variation, Lombardy and Lazio regions have very similar variation, while the value is much lower for Sicily as it only reaches +4.6%. Furthermore, there is a large gap between the regional and capital cities data, in fact in Milan and Palermo the NTN has increased by +16.6% and +14.1% respectively, highlighting the polarizing effect of metropolitan cities on the location of commercial activities compared to any of the regional territory. On the contrary, the NTN variation in Rome is slightly lower than in Lazio.

The analysis of the average prices trend, however, does not always provide similar results. In fact a general minus-valorization of commercial real estate persists and the national average is equal to -2.1%. By comparison of Lombardy and Lazio prices with the national average value, there are different gaps, as the quotation falls by twice in Lazio (-4.3%) and has just a slight decline in Lombardy (-0.8%), while it is very close to the national average in Sicily (-2.3%).

The falling in prices is even more intense in Rome (-5.35%), but it is interesting to note the opposite trends in Milan and Palermo. Despite the strong rising of transactions in both cities, the consequences on prices differ.

In Milan the prices decreased slightly (-0.7%), showing that high trade intensity made possible not to increase the bargaining margins and not to lower the price level. In this case the demand is still willing to pay high prices because it expects to obtain a good long-term profitability of the investment, both in terms of rental effortlessness and future plus-valorizations (Giuffrida et al., 2017; Napoli et al., 2017b). In Palermo, on the other hand, there is a further substantial reduction in prices (-6.7%) that is indicative of an urban market where the excess supply and the low liquidity of the retail properties result in transactions with a high loss of value and long waiting times for finding a buyer.

The NTN and average prices data are useful to know the real estate market trends, even if the monetary form (prices and incomes) of commercial locations assumes specific and always different connotations in each urban fabric.

On the urban scale, "high street" is a singular market segment that often anticipates and amplifies global or national real estate market trends, which may be even opposite to those that happen in the rest of the city.

Figure 2 shows the minimum and maximum annual rents of some retail properties located in high streets in Milan, Rome and Palermo.

The highest unit rental values are in via Monte Napoleone (with a peak of 9800 euros/sq.m./year) and via della Spiga in Milan, and also in via dei Condotti in Rome (8000 euros/sq.m./year), that are all places mainly oriented to foreign tourists shopping and where the symbolic value of Italian luxury and design, as well as of major international brands, is at its maximum.

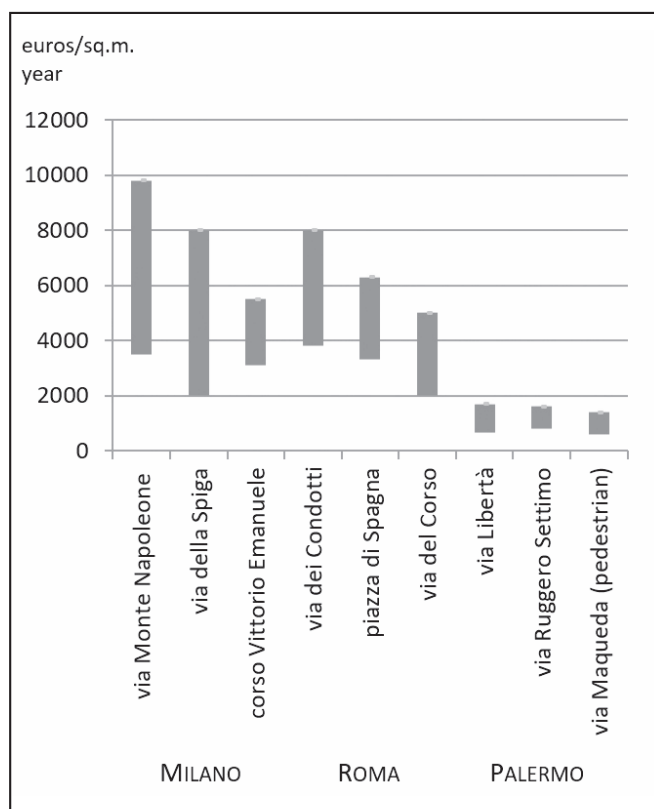


Figure 2 - Lease values in some high streets in Milan, Rome and Palermo (based on 2016 data, World Capital - Real Estate Group).

The most important high street of Palermo is composed of via Maqueda which is a sixteenth-century street in the historic centre, via Ruggero Settimo that crosses the eighteenth-century urban settlement, and via Libertà that leads to the upper class and noblesse districts that were build between the end of the 1800s and the first decades of the 1900s.

The annual lease of retail real estate in this high street (which, however, includes only the section of via Maqueda between piazza Verdi and piazza Vigliena) is far lower than in Milan and Rome and fluctuates between 1700 and 580 euros/sq.m.

The analysis of vacancy times in the same cities provides differentiated results (Fig. 3).

The vacancy time is equal to 8-6 months even in the most popular high street in Milan, probably due to the relatively small number of commercial business able to afford high localization costs, but, sometimes, there may be no vacancy with the immediate replacement of the tenant. Similarly, the vacancy time may vary from 1 to 6 months for properties in via Libertà in Palermo.

Nevertheless the same maximum time vacancy, which is 8 months, differences between via Maqueda and via Monte Napoleone because of the huge gap between the corresponding prices of retail property that denotes the weakness of demand and of social and economic system

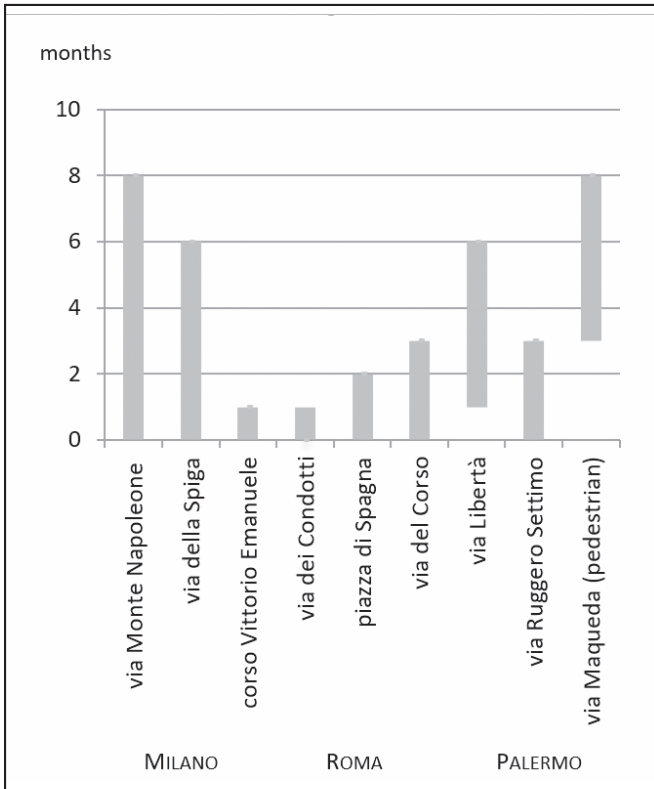


Figure 3 - Time vacancy in some high streets in Milan, Rome and Palermo (based on 2016 data, World Capital - Real Estate Group).

of Palermo. Indeed, despite the presence of a valuable historic and architectural heritage and a great tourist flow, the high streets of the historic centre of Palermo suffer from the competition of the three urban shopping mall and global e-commerce website, that are all factors that contributed to raising future risks on income and market value of retail real estate.

5. THE CASE STUDY: CITY, IMMIGRANTS AND RETAIL IN PALERMO (ITALY)

Palermo is a multicultural city in which, in 2011, 28,226 foreigners lived, equal to 4.1% of the total population (696.562 inhabitants) (Inter-institutional Observatory data). Immigrants were predominantly localized in the Tribunali - Castellammare and Palazzo Reale-Monte di Pietà (forming the historic centre) and Politeama central districts (Fig. 4).

The density of immigrants is particularly high in the historic centre where 23.4% of the 6.488 residents are foreigners (Fig. 5) and moreover there are more than 80 nationalities, although the most numerous communities are those from Bangladesh, Sri Lanka, China, Tunisia, Ghana, Mauritius and Romania (Fig. 6).

The choice of immigrant communities to live in the historic centre has produced significant social and

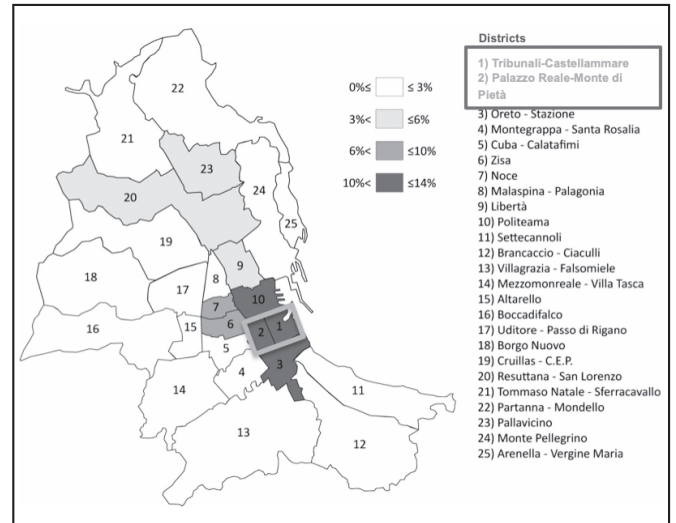


Figure 4 - Localization of immigrants in the neighborhoods of Palermo (2011).

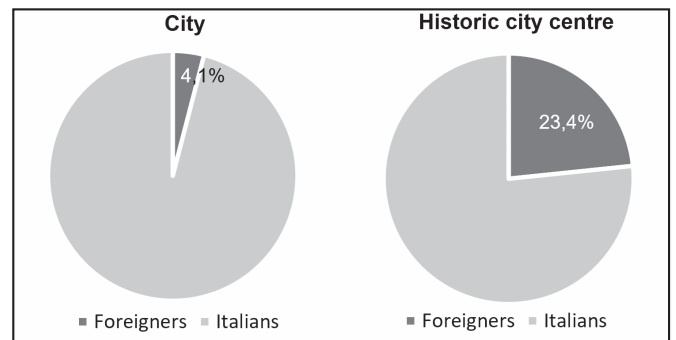


Figure 5 - Foreigner and resident population in Palermo and in the historic centre (2011).

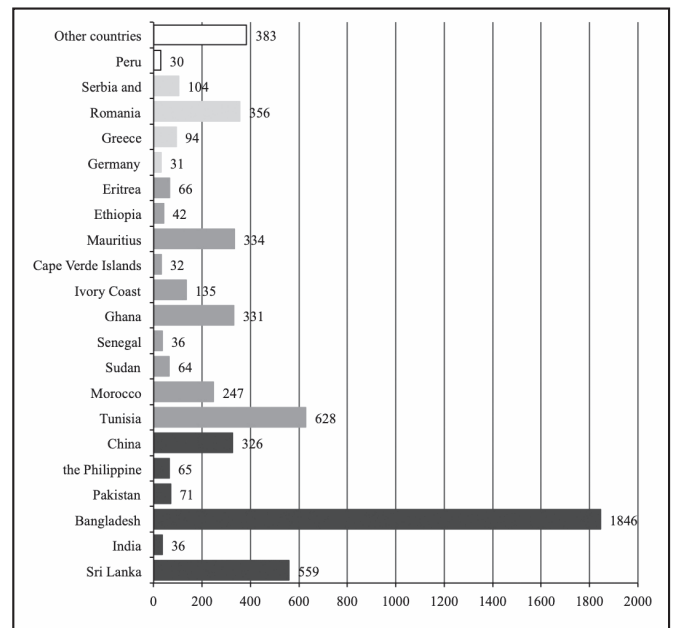


Figure 6 - Immigrants by country, historic centre of Palermo (source: Bonafede and Napoli, 2015, based on 2011 data).

economic consequences also on the local real estate market.

Such an amount of immigrants means, above all, the use of a considerable share of residential real estate, even if immigrants live mainly in low-quality or overcrowding buildings due to their low income-threshold (Napoli et al., 2016b; Napoli, 2017) and furthermore are exposed to the moving risk when gentrification processes are activated, in the same ways as other low-income “indigenous” social groups.

Public space use has been also modified due to the internal and external interactions with foreign communities, both in terms of habits and time of use, and of types of users, forming new hierarchies of inclusive or exclusive urban spaces (Bonafede and Napoli, 2015).

Another direct consequence concerns the use of retail properties and the management of retail shops and services, which strengthens the presence of immigrants in the neighborhood. These economic businesses managed by immigrants may be oriented to the needs of their own community or entire citizenship, as well as of the tourists who visit the historic centre.

In the current situation of high supply of retail properties, immigrants have an active role in the local real estate market and ensure a continuous income flow to landlords.

To verify the role of immigrants in this specific market

segment, a survey has been conducted focusing on the retail shops that are located in the following shopping streets of the historic centre (Fig. 7):

- *corso Vittorio Emanuele* or Cassaro (al-Qasr), which was the main street of the city until the 16th century;
- *via Maqueda*, built between the end of the 1500s and the beginning of the 1600s, that crosses Corso Vittorio Emanuele and divides the ancient city into four districts. It has imparted the direction of new urban districts and is subsequently extended by *via Ruggero Settimo* and *via Libertà*;
- *via Roma*, built in the nineteenth century after the partial demolition of the historic fabric, has always been a shopping street (retail shops and department stores) with tertiary function (there are many office buildings) but it has been facing a deep crisis for several years;
- *via Calderai*, where craft activities as metalworking are traditionally located, nevertheless they have been partly replaced by other businesses managed by immigrants;
- *via Ponticello* is a street to get to the Ballarò market;
- *Ballarò market*, historical outdoor market for the sale of foodstuffs;
- *via Bara all’Olivella – via dell’Orologio* are streets where restaurants are prevalently located.

A total of 1130 retail properties were analyzed from the point of view of the current use (used/unused), the type of goods sell (non-food/foodstuff) and the geographical origin of the tenants (continent).

A first datum that emerges (Fig. 8) is the share of unused properties that is more than a fifth of the total (22%). This value is quite high considering that they are the main streets of the historic centre where the commercial function is historically rooted. The demand of real estate for catering activities (bars, fast-food restaurants, pubs and restaurants) is 30%, while the presence of immigrants is 12% of the sample, with a strong prevalence of Asians (11%) and a small presence of Africans (1%) (Fig. 9).

The comparison of the data referred to *via Maqueda* and *via Roma* (Fig. 10 and 11) makes it possible to evaluate the opposite outcomes consequent to the provisions of the Municipal Administration regarding the pedestrianization and the Limited Traffic Zones (ZTL). Although both streets fall within the ZTL perimeter, *via Maqueda* is a pedestrian street from *piazza Verdi* to *piazza Vigliena* (where it connects to the pedestrian area of *corso Vittorio Emanuele*); on the contrary, *via Roma* remains a driveway. These decisions have created the conditions for the resumption of demand for the lease of new retail shops in the pedestrian area of *Via Maqueda*, and have also favored the immediate replacement (without any vacancy) of some declining shops with catering activities. *Via Roma*, on the other hand, has been penalized by the restrict accessibility, accentuating its ongoing decline as shopping street that has caused an increase in unused buildings and very long vacancy time (even more than one year). In *via Roma* the percentage of empty commercial



Figure 7 - Location of retail shops of the case study (historic centre of Palermo).

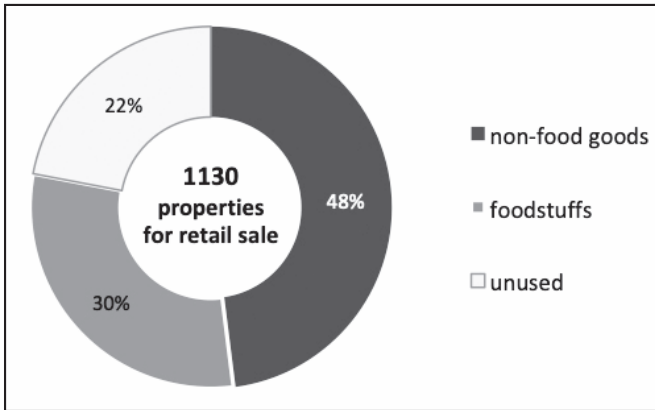


Figure 8 - Use of retail real estate in the case study.

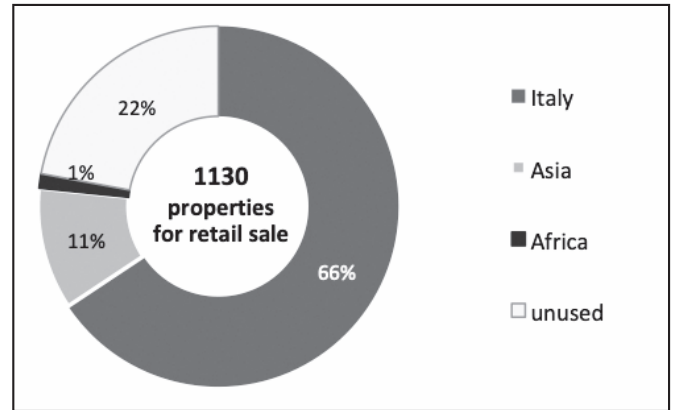


Figure 9 - Geographical origin of the tenants in the case study.



Figure 10 - Location of retail shops in via Roma and via Maqueda.

properties is high and equal to 35%, in addition the properties rented to foreigners are a very small number. In via Maqueda, on the contrary, nevertheless a quote of unused retail properties (19%), there is a large presence of shops managed by migrants that is equal to 20%. The immigrants are mainly Asians (especially Bangladeshis) who intercept the consumption needs of young people, tourists and residents by selling foodstuffs during extended opening hours.

However, it is noteworthy that the commercial properties leased to immigrants are located mainly in the section of via Maqueda between piazza Vigliena and piazza Giulio Cesare – which has remained open to vehicular transit until July 2019 – where rents are low and vary between 93 and 480 euros/sq.m./year, according to a direct survey in 2018, even if the most frequent values fluctuate between 100 and 200 euros/sq.m./year (Fig. 12). The presence of activities managed by immigrants becomes increasingly

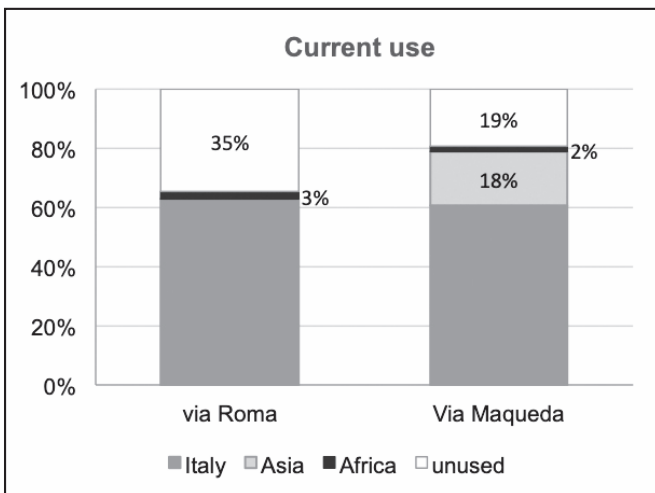


Figure 11 - Geographical origin of the tenants in the case study in via Roma e via Maqueda.

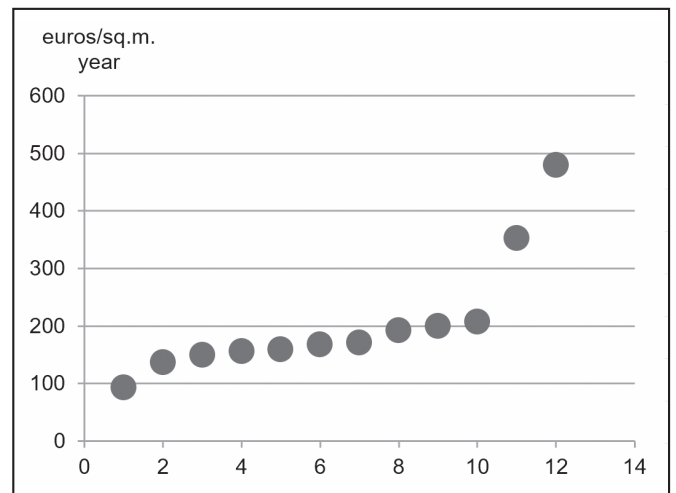


Figure 12 - Unit rent of retail properties in Via Maqueda (from Piazza Vigliena to Piazza Giulio Cesare) (direct survey in 2018).

sporadic as we proceed towards the city center (Piazza Giuseppe Verdi) where the high rents constitute an economic barrier to their location.

6. CONCLUSIONS

The modification of the localization patterns of retail properties due to the spread of new retail sales (shopping malls, megastores, e-commerce websites) has deeply affected the urban fabric and has led to the reorganization of the urban real estate market in terms of liquidity transmutation, demand/supply and values/income relations. Even the central areas of the city and the high streets may suffer a relative decline with long vacancy time caused by excess supply of retail property for rent.

These transformations, at the same time, give the opportunity to intensify the social interactions and the

rooting in the districts of the immigrants, as they play a significant role in supporting the demand for rental of residential and commercial real estate and in mitigating the rent decrease.

The analysis of the case study, formed by some high streets in the historic centre of Palermo, made it possible to verify that the rental demand for retail properties expressed by immigrants is not the result of a mere replacement of tenants, but is a real increment of demand for properties that would otherwise remain unused causing additional minus-valuations and a significantly reduction of profitability of real estate assets.

Besides it is important to underline that these retail shops are not only a place of exchange of goods where profit and income are generated, but they become places of social interaction and gathering that are fundamental for building of a contemporary multicultural city.

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