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**Are Governments Smarter Than We Think?  
The Welfare State in Canadian Provinces**

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**Abstract:** The welfare state was created to mitigate inequality between citizens. With the objective to alleviate housing inequalities in terms of affordability and suitability, low-income housing policy was a key social policy within the welfare state expansion in the post-war era. Over the past decades, many changes pertaining to low-income housing policy have taken place in most Western countries, including in Canada. These changes raise certain issues for our understanding of the welfare state. Three major changes related to housing policy instruments are observed in Canadian provinces since the mid-1990s, when the federal government exited the low-income housing policy domain: 1) abandonment of the government-owned public housing model; 2) housing projects operated by non-profit organizations are promoted; 3) the use of private market instruments is stronger. What mechanisms can explain the change of policy instruments in provincial low-income housing policy since the mid-1990s? The paper offers a historical institutional analysis of three Canadian provinces: British Columbia, Alberta and Quebec. Using a process-tracing methodology, the paper suggests that the three changes are mainly driven by the mechanism of instrumental policy learning. These results bring a fresh perspective to the welfare studies which are dominated by explanations in terms of partisan politics, ideational or paradigm shifts and power relations, but rarely stress the importance of policy knowledge by decision-makers. This analysis will be fruitful for comparative research in public policy since the drivers of welfare state changes are a much debated topic.

But what in fact is learning? The irony is that the importance and ubiquity of what we might think of as learning in turn makes it difficult to define. What does it mean to learn, and how do we do it? Our commonsense assumptions about learning are those we have from school. It seems to have something to do with teaching, with lessons, with doing well or badly. And then, on reflection, we seem to learn as much by informal as by formal processes: we learn from experience (which is sometimes gained by experiment), and from others, including our parents and peers. Often, the two are mutually reinforcing ...

- Freeman (2006, 367) in *Oxford Handbook of Public Policy*

The concept of learning is far from novel in political decision making (see for example Heclo 1974; Hall 1993). In a seminal article that has largely influenced the ‘new institutionalist’ turn in political science, March and Olsen (1984, 745) wrote: “It is a frequent observation of institutionalism that institutions accumulate historical experience through learning.” However, the concept of learning remains elusive and is marginalized by many contemporary scholars of institutional change and welfare state reforms (Morgan et al. 2010; Pierson 2004; Van Kersbergen and Vis 2014; Palier 2010). The elusiveness is explained by the lack of a common understanding of ‘learning’ as a driver of institutional change, the actors involved in the learning process, the intentions of those actors, etc. (Bennett and Howlett 1992; Heikkila and Gerlak 2013). As a result, the few researchers interested in the transformations of the welfare state who mostly use learning mechanisms do so in different and somewhat contradictory ways, adding to the confusion (Hemerijck 2013; Fleckenstein 2013; Gilardi et al. 2009; Weyland 2007). This paper will propose a renewed examination of learning in decision making, based on observations in the low-income housing sector.

With the objective to alleviate housing inequalities in terms of affordability and suitability, low-income housing policy was a key social policy within the welfare state expansion in the post-war era (Marshall 1975, 11, 165; Olsen 2013, 334-5; Lund 2011, 106-120). And yet, over the past decades, many institutional changes in the area of low-income housing have taken place in most Western countries (Schwartz 2015; Scanlon et al. 2014). That is also visible in Canada (Pomeroy and Falvo 2013). Three major changes related to housing policy instruments are observed in Canadian provinces since the mid-1990s, when the federal government exited the low-income housing policy domain: (1) abandonment of the government-owned public housing model; (2) housing projects operated by non-profit organizations are promoted; (3) the use of private market instruments (housing allowances or ‘vouchers’, rent supplements) is stronger (CHRA 2014, 2-16; CMHC 2011, 131-9; SHSC 2010, 5-6; Sousa 2013, 13-27; Leloup and Gysler 2009, 6-9; Steele 2007, 66-7; Divay et al. 2005, 20-30). In order to offer a comprehensive and systematic analysis, the paper will focus on the low-income housing policy in British Columbia, Alberta and Quebec, from 1975 to 2015.

Interestingly, similar kinds of shift in policy instruments are noticeable in other social policy implemented by numerous governments. When compared to the post-war era during the welfare state’s expansion, many contemporary social policy provide examples where the direct state intervention has given way to voluntary and private sectors provision of services (Jenson 2015; Morgan and Campbell 2011, 28-29; Salamon 2002, 1-6). Such major changes have been debated for decades in public administration if one thinks about the reinventing government (Osborne and Gaebler 1992) or privatization movements (Smith and Lipsky 1995), governance with adjectives (e.g. ‘new’, ‘collaborative’) (Rhodes 1996; Donahue and Zeckhauser 2011), third-party government

(Salamon 1995, 1981), etc. Discussions about ‘welfare mix’ (Evers 1995) and ‘welfare pluralism’ (Johnson 1987) are nothing new. Nonetheless, middle-range theories explaining the change of policy instruments resulting in reconfigurations of social welfare provision are still in demand<sup>1</sup>, basically to understand better “what governments do and why” (Klein and Marmor 2009, 994).

Current scholarship in political economy would usually treat these changes of policy instruments as the result of neoliberalism or austerity, being attributed to right-wing governments’ decisions (Hall and Lamont 2013; Steger and Roy 2010; Blyth 2013) under the influence of conservative organized interests (Hacker et al. 2015). That explanation may work on a very general level, but a detailed comparative-historical analysis of low-income housing in three Canadian provinces challenges this conventional wisdom. Since the sample is composed of three provinces known to have relatively distinct welfare regimes, according to Esping-Andersen’s (1990) typology<sup>2</sup>, the policy convergence deserves some explanation. Moreover, the gradual shifts occurred over a long time frame (forty years), where institutional reforms started by conservative administrations were pursued or even strengthened by social democratic governments, and vice versa. Elections and/or ideology cannot therefore directly account for the results. Governments of all stripes eventually favoured non-profit groups and private market instruments over government-owned public housing projects.

The policy convergence in the low-income housing sector of Canadian provinces is the empirical puzzle. It is the starting point of a broader inquiry on the drivers of the observed changes pertaining to policy instruments. In a nutshell, the research question is: Why are provincial governments doing the same thing? According to Bennett (1991, 217) who has written an oft-quoted article on the concept of policy convergence, there are “political mechanisms, operating at the level of middle-range theory, through which policies might converge.” He adds: “Convergence should also be seen as a process of ‘becoming’ rather than a condition of ‘being’ more alike” (Bennett 1991, 219). Therefore, a convincing answer to the research question would use a process-tracing methodology to shed light on the mechanisms at play in each province (Bennett and Checkel 2015, 3-4).

In this paper, I propose a renewed application of learning where economic reasoning guides the decision making process. I use the mechanism of ‘instrumental policy learning’ (May 1999) to explain the three major changes of housing policy instruments. Instrumental learning embodies the rational kind of decision making where options that have a higher costs-benefits advantage are selected over others. Policy elites’ analysis may be formal or more *ad hoc* resulting from trial-and-error of past policy experiences, but lessons can also be drawn from other jurisdictions (direct vs indirect learning) (May 1992, 333). Changes of housing policy instruments would be considered second order<sup>3</sup> changes according to Hall’s (1993, 278-9) typology: the goals of governments stayed the same (assist citizens in accessing affordable housing), but the techniques or instruments used to attain them were altered. By insisting on the dissatisfaction of senior officials with previous instruments, Hall does use learning and rational arguments to explain the change of techniques. Yet

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<sup>1</sup> That being said, scholars have made significant contributions in explaining the American case (see Hacker 2002; Morgan and Campbell 2011).

<sup>2</sup> Generally speaking, British Columbia, Alberta and Quebec are depicted as being members of the liberal welfare regime or cluster, as established by Esping-Andersen. British Columbia is the province that most closely aligns with the Canadian average. However, Alberta’s profile reflects a stronger similarity to the ultraliberal American model, while Quebec exhibits greater affinity to European models since it has established social policy that move it closer to social democratic countries (Proulx et al. 2011, 177, 186; Bernard and Saint-Arnaud 2004, 15).

<sup>3</sup> That is not the type of change that has retained most of the attention around Hall’s oft-quoted article. In radical or third order changes, the goals as well as the instruments and their settings are modified within the policy (Hall 1993, 279).

such changes are mostly described as the ‘everyday job’ of public administrators or say policy analysis ‘as usual’<sup>4</sup> (Hall 1993, 283, 288). But what if everyday learning or everyday policy analysis had amounted to profound institutional changes? “[I]mportant changes often take place incrementally and through seemingly small adjustments that can, however, cumulate into significant institutional transformation” said Mahoney and Thelen (2010, xi). That is exactly what this paper will explore, using learning as the main driver of the three major changes to policy instruments.

However, the mechanism of policy feedback must also be acknowledged for two major changes: grants to non-profit organizations (NPOs) and the use of private market instruments. Affiliated to the concept of path dependence, the mechanism of policy feedback (Pierson 1993) explains to a certain extent the continuity of these two housing policy instruments. The stage of policy formulation that precedes the launching of a new program is rarely similar to a *tabula rasa*. That stage is rather a moment of reflection by public administrations on the current situation and the kind of policy direction they want to follow which implies looking at government’s experience with previous policies (Howlett et al. 2009, 110, 199-202). The effects of the policy feedback mechanism have guided the decisions of policy makers to renew or reproduce former federal and provincial policy tools like grants to NPOs and market-based instruments. Overall, that path dependence mechanism produce a counteracting movement to the force of the learning mechanism, in other words it constrains the number of possible innovations that could result from learning.

Before presenting the conceptual findings, some background information will be provided. The first section on low-income housing policy clarifies the distinctions between the policy instruments under study. The second section of the paper offers a brief overview of the federal government’s involvement in the low-income housing sector as well as the increasing provincial autonomy. Finally, the third section is the core of the paper. Starting with empirical material collected in archives and through interviews with policy elites, this section aims to uncover the mechanisms that can explain how and why (Falleti and Lynch 2009, 1143) provincial governments turned away from government delivery of housing to embrace non-profit and private sectors provision of affordable housing.

## **I. Low-income housing policy: instruments under study**

The next paragraphs will detail the most important housing policy instruments in the Canadian context, designed by the central government and/or provincial governments to support *low-income renters*<sup>5</sup>. But note that these housing policy instruments are very similar to those implemented across the globe (Lévy-Vroelant 2011; Schwartz 2015).

Public housing is owned and managed by public authority, whether at the provincial or municipal level. During the post-war decades, public housing projects featured high-rise buildings containing large number of units (CMHC 2011, 130, 134). Non-profit housing projects are owned and operated by the non-profit organization (NPO) itself, as a legal person, which generally has staff

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<sup>4</sup> “Changes in policy at time-1 were clearly a response to policy at time-0 and its consequences. Experts in the public employ were primarily responsible for policy innovation, and the learning process as a whole took place primarily inside the state itself” (Hall 1993, 288).

<sup>5</sup> Other instruments exist. For instance, legislative measures are used by governments to protect the access to adequate housing for low-income households. Such measures may imply the enactment of different pieces of legislation controlling rent increase, limiting evictions, and so on (Olsen 2013, 338). However, this type of intervention strictly affecting the legal framework are beyond the scope of this paper.

or volunteers to run it. Most of the time, non-profit societies were founded by community groups, faith groups, service clubs, foundations, and so on. Housing co-operatives are own collectively by their members/residents, who also take an active part in the management (CMHC 2011, 131-4). “The majority of the co-operative housing stock is non-equity, which means that the housing is for use only and the resident does not hold a financial or equity stake in the resale of the property” (Sousa 2013, 24). Characterized by small-scale developments and a strong sense of community, non-profit and co-operative housing became more popular in the 1970s, partly in reaction to the public housing model (CMHC 2011, 133-4; Bouchard et al. 2010, 93-5). Non-profit and co-operative housing are often grouped together under the label ‘third sector’ housing (Fallis 2010, 181).

Private market instruments were also developed. The rent supplement program, in its private rental version, allows public authorities to seek agreement with private landlords and then to lease their units to low-income households at subsidized rates. This program was also introduced in the 1970s by the Canadian Mortgage and Housing Corporation (CMHC 2011, 134). The rent supplement program designed for private rental units (or private landlord rent supplement) will be analyzed along with housing allowances as both are private market instruments. Housing allowances are cash transfers with the aim of augmenting “the capacity of the household to occupy an appropriate dwelling unit by attaching the housing subsidy to the given household” (Galster 1997, 561). The household chooses its accommodation and if it moves, the subsidy moves with it. That gives the “portable” character to these housing allowances (also known as housing vouchers/benefits) typically used on the private market (Riccio 2008, 192). In addition to being portable, housing allowances are also confidential in the sense that landlords are usually not aware which renters receive financial assistance (Steele 2007, 65-80).

## **II. Overview of the low-income housing sector in Canada**

According to the Canadian constitution, housing is a matter of provincial jurisdiction. However, Bacher (1993, 9) stresses that the constitutional division of powers did not have an important effect: “Although federalism in Canada poses some additional challenges to social-housing advocates by blurring the lines of political responsibility, the structure itself has not impeded any government from taking action.” Despite the fact that the federal government has always acknowledged that social or affordable housing was not under its jurisdiction, it has made several interventions using its spending power (Banting 1990, 117, 126) as it did with other social policy under the purview of provincial governments (Noël 2008). Indeed, many authors highlight the strong federal role in the development of public housing after World War II and then third sector housing in the 1970s (Rose 1980, 29; Bacher 1993, 211-2; Pomeroy and Falvo 2013, 184-6)<sup>6</sup>.

The strong federal role in low-income housing policy formulation and funding during the post-war decades was partly explained by the weak one that provincial governments had back then (Carroll and Jones 2000, 280-1). Nevertheless, the situation has changed over time, with provinces building their institutional capacity and expressing their desire to acquire more control on policy direction in the 1970s (see Banting 1990, 128-9). After a first round of federal-provincial global agreements in 1979 where provinces have gained a bit more control over the delivery of low-income housing projects, the 1986 agreements have increased the provincial role a step further (Pomeroy 1989, 12). Provinces who wished to implement specific programs had to provide a minimum of 25% of their

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<sup>6</sup> The federal government has also supported private entrepreneurs through a variety of means to encourage them to build rental accommodation for low- to moderate-income households (CMHC 2011, 131; CMHC 1988, 6-7).

funding. “However, the federal government maintained ongoing leadership in terms of policy, coordination and accountability” (CMHC 2011, 136). Yet funding remained an important issue for the federal government as the Canadian Mortgage and Housing Corporation puts it:

The cost of subsidies to the federal government continued to rise because the costs to operate social housing projects [public housing, third sector housing and private landlord rent supplement] rose faster than rents. As the 1990s progressed, successive federal budgets gradually reduced the growth rate of the social housing funding envelope, with new program delivery ending in 1993 as government began to shift away from ongoing long-term subsidies and toward an increase in up-front capital contributions [...] (CMHC 2011, 136)

A few years later, the 1996 federal budget was a key moment in the evolution of Canadian housing policy. This budget followed that of 1995, which changed the game in many areas of social policy (Jenson 2010). In 1996, the federal government has offered provinces to completely transfer them the management and administration of low-income housing projects cost-shared with each province as well as projects solely funded by the federal government, with the only exception of housing on Native reserves (Canada 1996, 11-2). This has clearly marked the end of the federal leadership in terms of designing and substantially funding low-income housing policy across the country. While most of the provinces have agreed to the federal transfer, Quebec, Alberta and Prince Edward Island have still not entered into agreement with the central government to this date. British Columbia has signed the federal deal in 2006<sup>7</sup> (CMHC 2011, 137).

After the termination of funding commitments for new low-income housing units in 1994, the federal government has made a “return” in the sector in the early 2000s. Among its most important interventions are bilateral agreements between the federal government and the provinces, concluded from 2001-2002 onward through the *Affordable Housing Initiative* (AHI)<sup>8</sup> and the new *Investment in Affordable Housing 2011-2014 Framework Agreement* (Framework)<sup>9</sup> (CMHC 2011, 137-9). Overall, since the re-engagement of the federal government into low-income housing in 2001, provinces have gained much more autonomy than they did through the 1979 and 1986 global agreements. With regard to the AHI, “P/T [provincial/territorial] governments, through their housing agencies, design the programs and establish priorities, which may relate to special needs groups (e.g., seniors or off-reserve Aboriginal people). The housing agencies deliver [or implement<sup>10</sup>] and administer the programs by working with non-profit and co-operative groups and developers” (CMHC 2011, 137). The Framework has also enlarged provincial autonomy:

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<sup>7</sup> The agreement between British Columbia and the federal government excludes unilateral federal co-operative housing projects (CMHC 2011, 137).

<sup>8</sup> The purpose of AHI was to “to create new affordable housing units via up-front capital contributions, rather than ongoing subsidies” (CMHC 2011, 137). AHI bilateral agreements were negotiated periodically by both levels of government in the decade of the 2000s. “Bilateral agreements require that rental units produced have rents at prices at or below median market rent. Through these agreements, the P/Ts [provinces/territories] match federal investment (sometimes with contributions from other parties; i.e., municipalities, private sector, or non-profit sector)” (CMHC 2011, 137).

<sup>9</sup> Long discussions with public and private housing stakeholders on how to make the best use of federal funding have resulted in the 2011-2014 Framework. Senior levels of government have concluded new cost-shared agreements within the new Framework, again with the requirement of provinces to match federal contributions (CMHC 2011, 139).

<sup>10</sup> The word *implement*, referring to a more general stage of the public policy cycle (Howlett et al. 2009, 160-77), rather than *delivery*, would probably sound more familiar to political scientists.

P/Ts have the choice to maintain existing programs and/or introduce new initiatives to meet local needs and priorities. Initiatives under the Framework can include new construction, renovation, home ownership assistance, rent supplements, shelter [or housing] allowances, and accommodations for victims of family violence. Contributions by other local parties, including the private and not-for-profit sectors, are also encouraged.

Before introducing AHI in the early 2000s, the federal government acknowledged that provinces had developed stronger institutional capacity for policy formulation and implementation of housing programs. CMHC (2011, 137) stresses that “bilateral agreements have provided them [provinces] with increasing flexibility” on these matters. Despite this increased flexibility which may have led provinces to either take very different paths or maintain the status quo, provincial governments went in the same direction and have done quite the same thing. As highlighted in the introduction, provincial governments of British Columbia, Alberta and Quebec turned away from the direct government delivery of housing and mostly relied on NPOs and market based-instruments. From a theoretical perspective, that convergence is rather surprising. At least since the federal withdrawal in the mid-1990s, one would have expected further difference between provinces given that they had more autonomy to design and implement their own policy (Wallner 2014, 5; Banting 2006, 44; Ferejohn et Weingast 1997, x). How do we explain these similar patterns? The next section will provide some answers by using a process-tracing methodology along with a mechanistic approach (Gerring 2008), but will start by presenting quantitative data.

### III. Provincial housing policy

The data shown in figure 1 give a good overview of the use of housing policy instruments over a time span of forty years. To make it very simple, the figure only contains percentages. These percentages represent the proportion of units/households supported by every housing policy instrument receiving funding from the provincial government at a precise year. For instance, when it is indicated 30% that means that 30% of the units/households assisted by government are done so through that specific intervention or policy instrument. When it is indicated 100% that means that the government is only focusing on one type of intervention and that no unit/household is supported by any other means. Units are counted cumulatively, meaning that the data reflect all the units or households supported by the provincial housing agency/ministry at each moment in time, with or without federal support through CMHC. In other words, the data include joint programs involving both levels of government through cost-shared agreements or unilateral provincial programs. The three types of housing ownership, namely public sector, third sector and the private sector refer to the type of organization owning the units. Completed units have been used whenever possible, rather than housing starts (i.e. units under construction). Provincial annual reports for 1975, 1995 and 2015 as well as CMHC’s *Canadian Housing Statistics* reports were used to gather the data, with certain exceptions<sup>11</sup>.

Figure 1. Low-income housing policy in Quebec (QC), Alberta (AB) and British Columbia (BC)

	Public sector			Third sector			Private sector*		
	QC	AB	BC	QC	AB	BC	QC	AB	BC
<b>1975</b>	100%	100%	58%	0%	0%	42%	0%	0%	0%

<sup>11</sup> Some data were provided by senior officials from Alberta and British Columbia for the year 2015.

<b>1995</b>	45%	90%	21%	10%	3%	44%	45%	7%	35%
<b>2015</b>	30%	57%	11%	21%	15%	56%	49%	15%	32%

\* Only includes housing allowance and rent supplement programs

*Understanding the three major changes: the mechanisms at play*

The purpose of this section is to uncover the mechanisms that can explain the changes to housing policy instruments demonstrated quantitatively in figure 1. Why did policy makers reorient their approach from a ‘statist model’ in the 1970s with government-owned public housing projects to a model where third parties in the non-profit and the private sectors now provide affordable housing for needy citizens? The causes of this reconfiguration of the welfare diamond<sup>12</sup> (Jenson 2015, 91) must be analyzed with careful attention.

Economic decisions or decisions following an economic reasoning were crucial in the shift from public sector housing to grants to NPOs and market-based instruments. These alternative solutions are more effective than public housing from a cost-benefit analysis (Weimer and Vining 2011, 23; Weiss 1998, 276) when the number of households supported is compared against the cost of each program. The number of households supported is one thing, but the benefits of the third sector housing model and private market instruments also include other qualitative or non-economic aspects. Decisions to move in a new policy direction were not purely rational in the sense of optimal or synoptic (Lindblom 1959, 1979), but they were ‘satisficing’ (Simon 1956). To fully understand the decision making process behind such decisions, the mechanistic approach is very well suited for its attention to sequences and time (Bennett and Checkel 2015, 7). According to Falletti and Lynch (2009, 1143), “mechanisms [are] portable concepts that explain how and why a hypothesized cause, in a given context, contributes to a particular outcome.” My argument is that the mechanism of instrumental policy learning helps explain how and why the *permanent search for the best use of scarce resources* has contributed to all the changes of policy instruments. Other authors would rather use the mechanisms of independent problem-solving and lesson-drawing (Holzinger and Knill 2005, 780) to account for these changes, which would also make sense. However, I prefer to use the mechanism of instrumental learning – that roughly integrates lesson-drawing – to emphasize the long-term accumulation of experience and knowledge by public administrations (March and Olsen 1984; Radaelli 1995). Moreover, instrumental learning clarifies the connection between policy analysis by officials and the resulting changes in policy instruments as discussed earlier by Hall (1993).

Instrumental policy learning refers to policy elites’ assessment of internal programs, whether in a formal evaluation or on an *ad hoc* basis (direct learning), but note that public administrators may also analyze programs implemented in other jurisdictions (indirect learning). In any case, the ultimate goal is to improve the policy viability or effectiveness. “The rational-analytic view of instrumental learning, embodied in the policy analysis and evaluation literature, concerns improved designs for reaching existing policy goals” wrote May (1999, 23). He stresses that “[i]nstrumental learning

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<sup>12</sup> Nowadays the community and the market corners of the welfare diamond are extensively used by governments in housing policy, at the expense of the state corner. These three corners, together with the fourth corner which is the family, form the welfare diamond. The image of a diamond was put forward by Jenson (2015) to illustrate the four entities capable of providing well-being or welfare.

requires evidence of ‘increased intelligence and sophistication of thought’<sup>13</sup> about the policy or implementation design,” specifying that this includes the “[r]ecognition of the limitations of particular policy instruments” (*ibid.*). Certainly, the search for the best use of limited public monies has encouraged provincial administrators to abandon the public housing formula and instead to promote grants to third sector groups and private market instruments which have a better cost-benefit ratio. As a result of local and international experiences, decision makers have drawn lessons (Rose 1991, 5-10) about other weaknesses of the public housing formula such as concentrating poverty. Policy makers have learned over the years that grants to NPOs and housing allowances are less likely to engender such concentration of poverty and that represents a non-economic advantage or benefit. Other non-economic advantages include, for instance, the creativity and innovation capacities of NPOs to develop housing projects that meet the needs of vulnerable people, or the freedom of choice to select their accommodation that housing allowances provide to their beneficiaries.

However, some forms of continuity are also visible with regard to grants to third sector groups and private market instruments. Policy makers have taken satisficing decisions within the constraints of provincial budgets, but also of previous policy structure or arrangements. The mechanisms of policy feedback (Pierson 1993) related to the concept of path dependence partly explains the continuity of specific instruments designed by either the federal or provincial governments in the past. Although an analysis on the potential benefits of a policy alternative is usually conducted during the policy formulation stage, the assessment of the costs and the feasibility of such policy is as much important in the decision makers’ economic reasoning (Howlett 2011, 30). The policy feedback mechanism helps explain why grants to NPOs as well as the use of housing allowances in the private rental market, which began before the federal government disengagement from the low-income housing sector in the mid-1990s, have continued until today. The feedback effects of previous policy have greatly influenced the design of new programs towards similar policies, because officials were familiar with such programs and knew that they were ‘feasible’ (Weir and Skocpol 1985, 121). Provincial administrators also had to deal with the mobilization of organized third sector groups who were benefiting from the continuity of these policies. Such mobilization by interest groups also results from policy feedback effects (Mettler and SoRelle 2014, 162).

The next pages will serve to demonstrate empirically how the instrumental learning mechanism and the policy feedback mechanism, to a lesser extent, are useful to understand the three major changes to housing policy instruments. Each subsection will be dedicated to a specific change, using primary sources such as official government documents and interviews (N=51) with housing experts that have firsthand experience with the policy changes under study. All the quotes from Quebec government publications and senior officials were translated by the author from French to English.

### 3.1 Abandonment of the government-owned public housing model

In all three provinces, governments have not favoured the public housing model as their main policy instrument after the federal government withdrawal in the 1990s. That trend is a bit surprising given that provincial governments had full autonomy to choose any kind of policy instrument. Moreover, social-democratic parties were in power in British Columbia and Quebec. Largely influenced by the power resources theory, comparative social policy scholarship suggests that left-wing governments tend to support a stronger government presence in the delivery of social services

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<sup>13</sup> May is referring to the chapter of Etheredge (1981) about ‘government learning’.

(Esping-Andersen 1990; Huber et Stephens 2000). Thus partisan politics cannot account for the abandonment of the public housing model. In fact, the public housing formula has not been tossed aside at the same time in each province, but the mechanism of instrumental learning explains why even left-wing governments have mostly chosen other alternatives to provide affordable housing.

In British Columbia, the mechanism of instrumental learning, operating directly and indirectly, has mainly driven the decision making process that accounts for the permanent abandonment of the public housing model. Provincial administrators drew lessons through negative local and international experiences with public housing projects, because of high costs and social problems arising from the concentration of poverty. The social-democratic NDP government in power from 1972 to 1975 has built many public housing projects during its short mandate. In spite of this, policy elites expressed worries about the weaknesses of this policy instrument.

The cost of public housing subsidies has been climbing rapidly and is now close to \$5 million. The average operating loss per units is about \$1,000 per year. On new units, the average operating loss even with a mixed income clientele is over \$2,000 a year. The annual subsidies involved in building new housing to meet provincial low-income housing need would be enormous. Therefore, although it is necessary to continue to increase the number of units available, we must look to other methods to solve the current unmet housing needs. (British Columbia, Interdepartmental Study Team on Housing and Rents 1975, 24)

Yet the concentration of poverty also caught the attention of provincial administrators during the NDP governance.

Local and international examples of the inadvisability of concentrating large number of mother-led welfare families abound. Municipalities have been, and still are resistant to any form of subsidized housing, because of the image created by mistakes of the past. We are charged with the responsibility to ensure that scarce resources help those most in need. This involves the process of gaining municipal and neighbourhood acceptance, as well as assuring internal social viability. (British Columbia, Department of Housing 1975a, 42)

The production of public housing units finally ceased in 1976 after the Social Credit party came to power in British Columbia. That right-wing party wanted to limit the direct intervention of the state (Duvall and Audain 1993, 104-5) and focused on non-profit housing instead. But as the two previous quotes have demonstrated, the instrumental learning mechanism was already activated in the decision making process of policy elites trying to make the best use of limited resources. Note that the NDP government had also strongly supported third sector groups during its mandate (British Columbia, Department of Housing 1975b, 6).

The movement of the instrumental learning mechanism has not stopped in the 1970s. Intuitively, one may have thought that the return of the NDP government from 1991 to 2001 would have resulted in the re-establishment of the public housing program. First, that party did produce public housing units in the 1970s. Second, social-democratic parties have historically favoured more direct government intervention as mentioned earlier. This very senior official who was working for the British Columbia government in the mid-1990s when the NDP government implemented a major non-profit housing program, comments the policy direction taken by the NDP at that time. He makes a point that demonstrates the force of the instrumental learning mechanism with regard to the cost-benefit advantage and better public acceptance (avoiding concentration of poverty) of non-profit housing over the public housing approach:

You know even left-wing governments have to be business-minded [...] They still have to manage the provincial budget and if there is a cheaper way you have to... If you want to deliver a thousand units and you're committing to it for thirty or forty or fifty years, if it's more publicly acceptable and lower cost to do it through the third sector than even a left-leaning government will do that. (interview J. Bell 2015)

Quebec provincial government has maintained the construction of government-owned public housing until the early 1990s (SHQ 1994, 27), under the governance of both right-wing Liberal party and social-democratic Parti Québécois. The electoral victory of the Parti Québécois in 1994 coincided with the disengagement of the federal government, which has triggered the reflection on the part of provincial officials about the future of low-income housing in the province. The movement of the instrumental learning mechanism was visible in the policy process. The provincial housing agency produced a policy paper in 1997 (SHQ 1997) which was released the same day of the 1997-1998 provincial budget. That budget had the objective to improve public finances and maintain the path towards zero deficit (Quebec 1997, 30). The purpose of the policy paper was to assess the different policy instruments implemented over time. Public housing was the one receiving most criticisms: "The high costs of low-income housing programs such as public housing impose significant limits to the volume of interventions that the State can achieve [...] Thus to accommodate a single person on welfare in a public housing unit, the government spending reaches \$680 per month if it is an existing public housing unit and would be \$1,062 in the case of a new unit" (SHQ 1997, 4-5).

The former CEO of Quebec housing agency, in office when the public housing program was abandoned in the mid-1990s under the social-democratic leadership of the Parti Québécois, is one of many interviewees who have expressed their dissatisfaction with the public housing formula: "Public housing... it is so expensive, it's exorbitant if one considers the overall 'unit cost' including capital costs and all administrative costs. That is to say that for the money the state invests, you don't support enough low-income households" (interview J-P Beaulieu 2016). According to a former VP at the housing agency in the late 2000s and early 2010s: "It must be remembered that public housing developed in the 1960s received a lot of bad press because it was large projects. They were stamped "poor". It was 100% occupied by very disadvantaged people [...] We saw the bad sides of these housing projects plus the important cost side" (interview J. McGregor 2016).

In Alberta, the major trend until the early 1990s was to develop government-owned public housing and lodges<sup>14</sup> (AHSTF 1991, 14). That trend was set by the Social Credit party but mostly pursued by the Progressive Conservative party in power from 1971 to 2015. Both parties promoted right-wing politics. When Alberta Premier Ralph Klein won the 1993 election on the ground of eliminating deficit and streamlining government activities (Alberta, Legislative Assembly 1993, 8), that provoked a rupture in the 'traditional' course of action within the low-income housing domain. Initiatives were undertaken to shift the focus "away from the direct provision of service" (Alberta 1994, Municipal Affairs 3). The annual report of the ministry responsible for housing stated: "The department's role will change from service deliverer to service facilitator" and the business plan of the housing division included the objective to "develop a strategy to facilitate increased private sector (including non-profit) involvement in the delivery of social housing" (Alberta Municipal Affairs 1994, 3, 7). But the primary goal was to achieve dollar savings, the integration of the private or non-

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<sup>14</sup> Alberta government is involved in the development of supportive housing for seniors since the late 1950s through the Lodge program, "which [has] characteristics of both homes for the aged and nursing homes" (Rose 1980, 84). It is owned by municipal or provincial government (Alberta Housing and Public Works 1979, 7-10).

profit sector was secondary (Alberta Municipal Affairs 1994, 3). Indeed, the strategy evoked in the last quote has not materialized before the turn of the century since no capital funding for new housing units was made available until then.

When capital funding was resumed in the early 2000s onward, Klein himself and subsequent conservative governments have mostly pursued an objective of efficiency when they integrated private and non-profit organizations in the production of new affordable housing, illustrating the effect of the instrumental learning mechanism. Decision makers wanted to improve the implementation structure of the low-income housing policy. When questioned as to why the government of Alberta did not want the public sector to own most of the new affordable housing units, as it did throughout the 1970s and 1980s, assistant deputy minister Mike Leathwood answered:

It's a purposeful policy approach under grant programs that supported community-based ownership of affordable housing. And that was very clear in that decision for the 10 year period of 2002-2012, whereby one time capital grants were provided for up to 70 percent of costs to projects that provided housing below market and did not require ongoing subsidies [...] During this time the provincial government did not support increasing the number of owned units, given the opportunity to use grant programs under a partnership model that would provide more units in multiple communities with multiple partners, in a more timely fashion than direct government builds (interview M. Leathwood 2015).

In sum, the three provincial governments have ceased to use public sector housing as a dominant policy instrument. The moment where these decisions were put into effect was not the same, but the driver was similar across provinces: government-owned housing was not considered to be the most efficient option anymore, for economic as well as non-economic reasons. Theoretically, the instrumental learning mechanism is very helpful to explain the analysis of policy makers behind such decisions. Now the next subsections will show how policy elites have done things differently.

### 3.2 Housing projects operated by non-profit organizations are promoted

Third sector groups and typically NPOs became the main vehicle to produce new affordable housing units in all three provinces since the mid-1990s. However, the shift towards NPOs did not happen at the same time nor at the same scale in each province. Let's take a look at the mechanisms at play in each province.

In British Columbia, the permanent switch from government-owned housing to grants to NPOs occurred in the mid-1970s, but that trend was not reversed when the social-democratic NPD was in power from 1991 to 2001. Through the instrumental learning mechanism, governments of all stripes have realized that non-profit housing has many advantages over public sector housing. The former assistant deputy minister from 1977 to 1986 who served under the Social Credit leadership highlights two important points that justify the adoption of the non-profit formula. He says that "Operating and development costs are lower than in government initiatives which more often require dealing with unions," but more importantly he stresses that "Local non-profit groups are better able to deal with local community issues" (interview A. Armitage 2015). Therefore, he reinforces the previous quote from the senior official working for the British Columbia government who emphasized the economic and non-economic advantages of the third sector model over the public housing formula, in order to explain why the NPD did not build new public housing units when it came back in power in the 1990s.

In 1994, the NDP government introduced HOMES BC, the new *made in B.C.* housing program after the federal government withdrawn. That program which was established to “showcase the creativity and expertise of B.C.’s non-profit sector” according to the then housing minister (BC Housing 1994), also demonstrates the presence of a path dependency. Policy feedback effects of the previous federal non-profit housing program have greatly influenced the design of HOMES BC. Indeed, the guidelines of both programs are extremely similar (BC Housing and CMHC 1993, 1; BC Housing 1994, 5). This quote from the same senior official illustrates these policy feedback effects: “We just stuck with what we knew. We had a formula that was developed with the federal government on how to deliver programs. We delivered... BC Housing delivered the federal provincial programs [since 1986]. So we were familiar with how to deliver and get units built” (interview J. Bell 2015). About HOMES BC he said: “We were able to refine it, but basically use the same delivery model that we did previously with the federal-provincial housing” (interview J. Bell 2015).

For government and NPOs, that is a win-win arrangement. In fact, the endurance of the non-profit model in British Columbia housing policy is also explained by the mobilization of third sector groups themselves, through the mechanism of policy feedback. Since these groups receive funding through such policy orientation, they benefit from its continuity. A former executive director of the BC Non-Profit Housing Association tells her personal story: “HOMES BC, I was involved in getting that program... lobbying government to implement that program, from the non-profit sector side and the co-op side. The co-ops and non-profits actually put that concept of that program together and promoted it to the NDP when they were still in opposition, promoted the concept. Then when they got elected, they said "Ok, let's take a look at this program"” (interview A. Sundberg 2015).

Under the governance of the British Columbia Liberal Party since 2001, provincial officials continued to promote the non-profit housing formula for its economic as well as its non-economic advantages. This quote taken from the provincial housing strategy summarizes both path dependence and learning mechanisms: “The Province’s long term policy has been to support a strong non-profit housing sector. Non-profit housing providers are best suited to manage the social housing stock and attend to British Columbians in need. This successful policy approach has resulted in 90 per cent of our stock being directly managed by non-profit organizations” (British Columbia 2014, 15).

The case of Quebec has many similarities with that of British Columbia. The same learning and path dependence mechanisms also interact. The main difference between both provinces is that Quebec provincial government decided to focus on third sector groups in the mid-1990s after the federal government disengagement. Even though numerous co-operative and non-profit housing projects had also been supported since the 1970s, in parallel of public housing projects, the shift towards third groups was mostly visible in 1997 with the introduction of AccèsLogis program under the social-democratic leadership of the Parti Québécois. That program has been the main affordable housing program ever since (Ducharme and Vaillancourt 2012).

The adoption of the third sector housing model by the Quebec government is chiefly explained by the instrumental learning mechanism. As mentioned earlier in the quote of the former CEO of the provincial housing agency who disbanded public housing and focused instead on grants to third groups, public housing was not the most adequate option from a cost-benefit analysis. He indicated that this was especially true for large cities where big public housing complexes were built in the post war decades. In fact, he emphasized that the shift to the third sector housing approach was also

explained by the desire of decision makers to avoid ‘mistakes of the past’, referring to social problems that arose from the concentration of low-income families in such public housing complexes (interview J-P. Beaulieu 2016).

However, a path dependency is also visible in the policy process in Quebec. As in British Columbia, public administrators at the Quebec provincial housing agency have continued to fund third sector groups as a matter of ‘routine’, out of habit so to speak. Given that the provincial housing agency had a long experience in funding co-operatives and NPOs when it was implementing the last federal non-profit program as from 1986 (SHQ 1994, 29) or even its own program in the late 1970s (Quebec 1984, 191-2), providing grants to third sector groups through AccèsLogis program was not a radically new intervention. That was already a ‘standard operating procedure’ (Mettler and SoRelle 2014, 151). The mechanism of policy feedback is noticeable in the words of a former senior official at the housing agency who gives the example of the second component of AccèsLogis, a component that is dedicated to frail seniors. Employees of the housing agency used to do similar housing projects in the late 1980s, through the last federal but provincially implemented non-profit housing program, showing the continuity from that program to AccèsLogis:

The first housing projects were in that [federal] program, for seniors with a minor loss of autonomy. In collaboration with the ministry of Health, we were making the selection of the projects that were presented to us [...] With these housing projects we wanted to test a new intervention for seniors, but outside of the Health sector [...] Then it changed over time, some projects were done in public housing complexes, sometimes with the ministry of Health. There have been ups and downs with those projects. And then the second component of AccèsLogis obviously followed directly from those projects. (interview F. Renaud 2016)

I also observe policy feedback effects that have induced third sector groups to mobilize and push for the pursuit of government funding to their groups. To say that does not change the fact that they were surely doing it for the noble cause of housing low-income people, just like the former executive director of the BC Non-Profit Housing Association. In Quebec, Marcelin Hudon was very involved in the third sector movement which tried and actually succeeded in influencing government in the early 1990s. He personally wrote the document that was submitted to government in 1993 in order to create a new third sector affordable housing program at the time of the federal government disengagement (CQCH and AGRTQ 1993). That program was first tried as an ‘experiment’ with the City of Montreal, but eventually became AccèsLogis after a series of adjustments were made, especially during the 1996 Economy and Employment Summit. “In these negotiations, it’s a series of compromises” said Hudon, before emphasizing the central role of third sector groups in the AccèsLogis program: “The program was established for... by and for community groups. It was designed that way, understood that way” (interview M. Hudon 2016). Therefore, it is clear that both Quebec government and third sector groups had a mutual interest in developing that program which has permitted the realization of the majority of new affordable housing units since the mid-1990s.

Unlike British Columbia and Quebec, the Alberta government has not focused its housing dollars towards third sector groups in order to create new affordable housing. The privileged method in Alberta – even when Premier Klein was still in office – was to issue requests for proposals where private companies, NPOs and organizations affiliated to the public sector<sup>15</sup> were invited to submit

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<sup>15</sup> These public organizations are housing management bodies (HMBs) at the municipal level, but that act as agents of the provincial government (Alberta, Auditor General 1994, 2; Alberta HUA 2011a, 7).

their proposal to obtain funding in order to produce new units (Alberta Seniors and Community Supports 2005, 33; Alberta 2008; Alberta HUA 2010, 11-4). The detailed analysis of the total units developed since the government has resumed its capital funding for all forms of affordable housing – from 2000 to 2015 – reveals that NPOs have produced more units as compared to other sectors even though the difference with the private sector is thin<sup>16</sup>. It should be noted that the third sector must be analyzed jointly with the private sector in Alberta, in opposition to the public sector. The instrumental learning mechanism has driven the policy process where decision makers have come to realize that public ownership should not be the main solution to the housing problem as it used to be until the early 1990s. Basically, the government of Alberta wanted to have ‘more players’ involved, that is NPOs and private organizations. The policy feedback mechanism does not explain the place that NPOs now occupy in the housing domain<sup>17</sup>.

All in all, the fact that NPOs have realized more affordable housing units is mostly due to their ‘good’ projects submitted through requests for proposals for which they have obtained funding. That being said, I argue that the establishment of open requests for proposals is the result of the instrumental learning mechanism where decision makers wanted make the best use of limited dollars. Even if British Columbia and Quebec have done differently<sup>18</sup>, there are some similarities in the reasoning of policy makers in all three provinces. Basically, the objective of the Alberta government was to develop a more effective approach, to do better than the old-fashion ways when virtually all the units were done by the public sector and affiliated organizations. The general idea was to include ‘more players’ in the game so it could be more competitive. An experienced senior official emphasizes the positive impacts of setting open requests for proposals: “We’ve really seen a lot of competition and it’s been beneficial because the prices have been very competitive. So that kept a lid on prices of per unit costs. And also there has been a lot more creativity and innovation in the design and development of these projects” (interview R. Hubele 2015). That echoes the quote from the assistant deputy minister in the previous section who pointed to efficiency purposes to explain that the government of Alberta refused to pursue the ‘statist model’ because it wanted to produce more units in a timely fashion.

All these reasons demonstrate the effects of the instrumental learning mechanism in the creation of new affordable housing through open requests for proposals where government supports the best projects. Economic as well as non-economic advantages are also highlighted in annual reports of Alberta Housing and Urban Affairs (2010, 12): “This [request for proposals] process, which leverages private dollars with taxpayers’ money, creates community partnerships and allows more units to be built more efficiently. It further allows for projects to be tailored meeting the unique needs of the community.” Another request for proposals has given “preference to developments that do

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<sup>16</sup> 10,641 units in the non-profit sector, 9,882 units in the private sector and 7,753 units in the public sector (data provided by M. Leathwood 2015 and R. Hubele 2016).

<sup>17</sup> The Alberta government did not subsidize the third sector groups as much as British Columbia or Quebec before the federal government withdrawal. Therefore, providing grants to third sector groups was not a standard operating procedure within government and these groups were probably not strong enough to mobilize and convince the government that it should be the only actor to receive funding for the construction of new units. Data presented in figure 1 do support this claim (see Alberta 1995, *third sector*).

<sup>18</sup> British Columbia and Quebec also issue requests for proposals or set bidding processes, but they are for third sector groups. After all, open requests for proposals in Alberta demonstrate that the public sector has not been dismissed for ideological reasons. Between the three provinces, Alberta is the only one where public sector organizations have developed a substantial number of new affordable housing units since the federal government’s disengagement. That may seem counter-intuitive given the right-wing orientation of the Progressive Conservative party in power until 2015. But that supports the claim that partisan politics has not really affected the changes in housing policy instruments.

not contribute to over concentration of social or lower-income housing within any single community or neighbourhood in any municipality” (Alberta HUA 2011b, 15). Consequently, if NPOs have succeeded in submitting good projects in an open competition to make the best use of public monies, then that is because provincial administrators have come to realize that NPOs are capable of providing adequate and affordable housing to citizens in need.

In spite of the policy window (Kingdon 2013, 165-6) that occurred in the mid-1990s in the wake of the federal government withdrawal, British Columbia and Quebec have designed programs that promote third sector housing. Both learning and path dependence mechanisms are noticeable in the development of such programs. Even if the non-profit sector does not hold a dominant position on the welfare diamond in Alberta housing policy, it is gaining ground. The instrumental learning mechanism is also useful to understand the decision making process that has led to the rise of the third sector, in stark contrast to the traditional public sector housing that was promoted earlier.

### 3.3 Stronger use of private market instruments.

As the evidence presented in figure 1 shows, Quebec and Alberta have increased their use of private market instruments namely housing allowances or rent supplements after the federal government disengagement. The government of British Columbia has also enlarged the number of households that it was supporting in absolute numbers, from 13,338 households in 1995 to 32,732 households in 2015. In fact, numerous innovations pertaining to private market instruments were developed in British Columbia in the past decades. However, since figure 1 presents percentages, that increase was outperformed by the increase of non-profit housing units developed during that same period as well as the transfer of non-profit housing projects funded solely by the federal government in 2006. As mentioned earlier, the British Columbia government has agreed to the federal transfer<sup>19</sup>. Again, the instrumental learning mechanism was fundamental in the policy process when decision makers in all three provinces have decided to extend their use of private market instruments. Such measures have many advantages recognized by governments of all stripes. Most decision makers believe in a range of policy instruments or say a ‘toolbox’ (Howlett 2011), where market-based instruments complement construction programs to address housing needs. That being said, the mechanism of policy feedback also explains the reproduction of previous provincial housing allowance programs and the federally-designed but cost-shared private landlord rent supplement.

The widespread use of private market instruments in British Columbia and especially housing allowances is primarily explained by the effect of the instrumental learning mechanism. Policy elites have promoted housing allowances because of their numerous economic as well as non-economic advantages. Former assistant deputy minister Andrew Armitage has summarized the benefits of the Shelter Aid For Elderly Renters (SAFER) introduced by the Social Credit government in the late 1970s. As the first housing allowance in Canada, SAFER provided direct cash transfers to eligible seniors following a formula that considers rent to income ratio with maximum rent levels.

[P]ublic and non-profit senior citizens construction came to be seen as a very expensive solution to the housing related problems of many senior citizens. It was felt that a shelter allowance programme, such as SAFER, could address many of the problems facing the construction programme. First, SAFER covers all low income elderly renters, hence it is universal for those in need. Second, it allows senior citizens who are able to stay in present

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<sup>19</sup> The federal transfer has added approximately 15,000 non-profit housing units (data provided by T. Bennett 2016).

accommodation to do so if they choose. Third, since it works in conjunction with private sector accommodation and has a controlling mechanism built into the formula, it required far less subsidy on a per unit basis. Fourth, SAFER greatly reduces the inequity between the treatment afforded [to] those living in the public/non-profit sector versus those living in the private market. (Armitage 1978, 17)

As the previous quote has demonstrated, the introduction of SAFER derives from decision makers' efforts to improve the housing policy by making it more effective, efficient and equitable<sup>20</sup>. The policy process was guided by the goal of helping the maximum number of people with limited resources. Even if the solution found was not necessarily 'optimal', the cost-benefit analysis behind this new program is visible. Benefits are not strictly conceived in terms of the number of people supported. Qualitative aspects are also taken into consideration since we cannot 'measure' the added benefit of having the freedom to choose the accommodation where one wants to live. Depending on the situation of the person in need and the housing market in one location, private market instruments can be very useful.

Premier Ujjal Dosanjh leader of the NDP has also realized that. Even if the NDP government had a preference for non-profit housing as discussed earlier, Dosanjh has introduced HOMES BC rent supplements at the end of its mandate in 2001. The federally-designed private landlord rent supplement program was also in effect since the late 1970s, although it did not reach a large number of households (BC Housing 1979; BC Housing 2015a, 57). The rent supplement program implemented by the NDP government in 2001 was an even smaller program, but it is worth mentioning to show that knowledge about policy instruments goes beyond partisan politics. Premier Dosanjh has justified the introduction of the program with those words: "In communities where affordable housing is needed but vacant rental units exist, we will be providing new rent supplements [...] This is a well-rounded program, and it shows this government's continuing commitment to providing safe, affordable and appropriate housing" (BC Housing 2001).

Since the Liberal party is in power, two private market instruments were developed. The most important one is the housing allowance Rental Assistance Program (RAP) introduced in the *Housing Matters BC* global strategy of 2006 that provides "direct financial assistance to low-income, working families" (British Columbia 2006, 13). Another program is focused on the homeless population or people at risk (BC Housing 2015a, 16). Hence the movement of the instrumental learning mechanism has continued under the Liberal governance since the early 2000s. All of the economic as well as non-economic advantages enumerated in Armitage's extensive quote were reiterated and elaborated when the government launched the RAP program (British Columbia 2006, 13). However, the policy feedback effects of SAFER have encouraged policy makers to follow that path. Policy elites openly replicated SAFER to design RAP (interview G. Steves and M. Hope 2015). As BC Housing CEO summarizes it: "We had a program for seniors and in 2006 when we wanted to introduce a new direction for families, we very much relied on the SAFER model to create that" (interview S. Ramsay 2015). Consequently, a path dependency is also observable in the government decision making.

The situation in Quebec parallels the one in British Columbia. The instrumental learning mechanism drives the policy process, operating directly and indirectly, but a path dependency must also be taken into account. The first housing allowance *Logirente* was launched by the social-

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<sup>20</sup> The notion of equity should be understood as 'horizontal equity' where people with similar needs would receive a similar level (or close to) of assistance (British Columbia, Department of Housing 1976a, 8).

democratic Parti Québécois government in 1980. A former senior official who has work on the design and implementation of Logirente confirmed that him and his colleagues at the Quebec housing agency were very much inspired by the SAFER model in British Columbia (interview F. Renaud 2016). In fact, Logirente was an identical copy of SAFER: targeted to seniors, using the same formula to calculate benefits, etc. But with the difference that it also included owners who were spending over 30% of their income on shelter costs (SHQ 1992, 25). That same senior official and the division he was part of were producing research on housing policy trends in Canada. The SAFER program had caught the attention of then Quebec housing minister Guy Tardif who wanted to develop a Quebec version of the program (interview F. Renaud 2016). Yet Guy Tardif was quite pragmatic about Logirente after its implementation. He has indicated that it was not a policy instrument appropriate for all cases, but he underscored that it could help many people who just had an affordability problem, and for much cheaper than the public housing formula (Quebec, Assemblée nationale 1984, 7287).

In Quebec, the private landlord rent supplement designed by the federal government has started on an experimental basis in 1987 under the governance of the Liberal party (SHQ 1988, 21). This former senior official at the housing agency clearly remembers how it happened: “We went a day or two at Toronto because the program had been implemented for several years in Ontario [...] We’ve looked at the evolution of the program in Ontario. They were already supporting 10,000 units, more than 10,000 units. We found it interesting because public housing was complicated to develop. It was expensive in terms of investment” (interview C. Roy 2016). The housing agency has tried the formula and after a short period of time, decision makers realized that they should use it more intensely. “Politically it satisfied everyone. It satisfied policy makers, it didn’t seem expensive [...] It’s a fast response to urgent needs” said the former official, who stresses that the cost is actually not cheaper on a long-term perspective (interview C. Roy 2016). His declarations perfectly illustrates the effect of the instrumental learning mechanism operating indirectly first and then directly in the policy process.

Nonetheless, the mechanism policy feedback is also part of the explanation as to why the Quebec government is using more private market instruments. When the social-democratic Parti Québécois came back to power in the mid-1990s, the government has developed a new housing allowance named *Allocation-logement* (SHQ 1999, 21). That program results from the merger of Logirente and another program also named ‘allocation-logement’ which was administered by the ministry responsible for social assistance. The latter program provided an additional amount given to families receiving social assistance who were facing high shelter costs. Finally, the merger of both programs created Allocation-logement in 1997, a program designed to support both seniors and families. Seniors actually saw their benefits reduced while families saw them increase in a larger proportion. The objective of the government was to harmonize the two previous programs as a matter of horizontal equity (SHQ 1997, 15; Trudel 1996, 4). Since the new program was a merger, policy feedback effects of previous programs are evident. That demonstrates the continuity in the policy.

In Alberta, the federally-designed private landlord rent supplement program began to be used in the mid-1980s, but not to a large extent (AMHC 1985, 9). However, that program was promoted in the 1990s. In fact, that is the only housing program which has seen a strong growth in the decade of the 1990s (AMHC 1990, 8; Alberta Municipal Affairs 1999, 28). As discussed earlier, Premier Klein has cut capital budgets to build new affordable housing units during the 1990s. The interest of policy makers with regard to private market instruments was sparked by the housing crisis in the mid-2000s. The rent supplement program was expanded to reach more households and finally a new

housing allowance program was introduced, the Direct to Tenant Rent Supplement Program (Alberta HUA 2011a, 10). Another initiative must be mentioned. Even if it didn't last long, the Homeless and Eviction Prevention Fund was also introduced as a new measure (Alberta HUA 2010, 15). The program provided “a range of short-term assistance to any Alberta individual or family at risk of losing their rental home, including: payment of rental arrears, utility arrears, and rent shortfalls” (ASFHA 2008, 22).

The instrumental learning mechanism was driving the policy process, with policy makers trying to address the housing crisis. That is very apparent in the words of Mike Leathwood, assistant deputy minister at the ministry responsible for housing: “For immediate assistance they [government] brought in the Direct to Tenant program. They said we can help people right away by providing rental assistance. And a fund that was called the Homeless and Eviction Prevention Fund because you had people moving to the province, with limited financial resources, but needed to fill the job vacancy market” (interview M. Leathwood 2015).

But again, the instrumental learning mechanism interacts with the policy feedback mechanism since political and bureaucratic elites were searching for the best solutions to solve a problem, and that is usually done by looking at the various policy instruments in the toolbox for inspiration. The Task Force set up by the Prime Minister of Alberta to find solutions to the housing crisis wrote: “The more timely and efficient solution to get people into affordable housing is to increase the current allocation to rent supplements [...] A portion of the RSP [rent supplement program] allocation would be used for a pilot project to test the feasibility of attaching subsidies to qualified individuals, rather than to units” (AAHTF 2007, 17). That pilot project became the Direct to Tenant Rent Supplement, which is now a permanent program. This program is an innovation in itself, but that does exhibit some form of continuity from a previous one.

As a result of Task Force, we introduced the Direct to Tenant Rent Supplement program. We had never done that before. We had done the traditional Private landlord subsidy program cost-shared with the feds, with the agreement with the landlord to set units aside and then you subsidize the person to the unit [...] We brought in the Direct to Tenant program as an immediate measure to get financial assistance to households in need in a hot housing market, that had close to 1% vacancy and rapidly rising housing costs. (interview M. Leathwood 2015)

In short, whether they were run by right-wing or left-wing parties, governments in all provinces have learned over several decades that private market instruments can be effective, efficient and equitable. Yet these instruments may not be appropriate in every circumstances. But that subsection has demonstrated that private market instruments were useful enough to be reproduced showing the effects of the policy feedback mechanism.

## **Conclusion**

In this paper, I've developed an analytical framework to explain similar patterns of welfare state reforms. As a key social policy, low-income housing still has the objective to reduce inequality between citizens, to provide affordable and adequate housing for those in need. However, the policy instruments or techniques have changed over time. A detailed analysis of provincial housing policy in three Canadian provinces from 1975 to 2015 has revealed similar changes. Decision makers have mostly turned away from the 'traditional' public housing model and chosen to support the development of new affordable housing through third sector providers instead. Policy elites have also

embraced private market instruments such as housing allowances and rent supplements. That convergence is rather ‘unexpected’ in a federal context where provinces had more autonomy than ever. In fact, governments with sharp ideological differences among the three provinces as well as inside each province have adopted or pursued similar kind of measures.

The major shifts to housing policy were guided by one principle: the permanent search of policy makers for the best use of scarce resources. But to illustrate the “big, long-term processes” (Pierson 2004, 102) through which a series of decisions following an economic reasoning were taken, I have used a mechanistic approach. The mechanism of instrumental policy learning has mostly driven the policy process that explains the three changes of policy instruments. In an era of permanent austerity (Bonoli 2013, 3; Pierson 2001) where provincial administrators had limited resources on the one hand and large housing needs on the other hand, they had to search for the best solutions within available housing budgets. Policy makers have learned from past experiences inside and outside their jurisdiction that public housing projects were expensive to operate while being criticised for concentrating poverty. In a few words, decision makers didn’t want publicly-owned housing to be a central policy instrument anymore. Even if public housing has not explicitly been labelled as a ‘policy failure’ (Ingram and Mann 1980; Wildavsky 1987, 41-61), the dissatisfaction has triggered the search for more viable, alternative instruments. Non-profit housing and private market instruments were then seen as more effective, efficient and equitable options for several economic as well as non-economic reasons.

Yet another mechanism explains some form of continuity in provincial low-income housing policy. The learning mechanism interacts with the mechanism of policy feedback. The latter is useful to explain why public officials usually pursue or reproduce the instruments that they are familiar with. When public administrators think about the feasibility of adopting a new program during the policy formulation stage, they usually rely on previous interventions and not on some unknown program tried in a foreign country. Moreover, the beneficiaries of previous policy will mobilize to support the continuity of such policy. As shown in this paper, third sector groups have organized to defend their interests. Simply put, path dependence mechanism such as policy feedback limits the “menu of available policy alternatives” (Jacobs and Weaver 2015, 442) for policy makers. In provincial housing policy, policy feedback partly explains the development of third sector housing as well as the stronger use of private market instruments. That interaction of learning and path dependent mechanisms is very stimulating, as it seems to capture more and more attention from scholars in policy studies (White and Prentice 2016; Marier 2013; Howlett et al. 2009, 209).

More importantly, the argument presented in the paper has a potential of great applicability. Cost-benefit analysis about possible alternatives is the basics of policy analysis or evaluation (Stokey and Zeckhauser 1978, 134-158; Bardach 2012, 34-6) and policy making more broadly (Smith and Larimer 2013; Howlett 2011, 30). However, none of the popular theories of institutional change take this kind of evaluation very seriously (Mahoney and Thelen 2010, 2015). That is also true for studies of welfare reforms, where votes (Bonoli 2013), ideational or paradigm shifts (Morel et al. 2012) and coalitions of actors (Hausermann 2010) are usually considered more important. The main contribution of this paper was to demonstrate that in light of their formal or *ad hoc* cost-benefit analysis, decision makers have changed the course of public action, changed the policy instruments of the low-income housing policy. Learning best captures the policy process of institutional change because it is dynamic, it unfolds over time. Public administrations have learned that third sector housing and private market instruments have many advantages over public sector housing, and that

has oriented the decision making. In fact, senior officials are now fully aware of the strengths and weaknesses of each policy instrument and that clearly results from the accumulation of knowledge. Hence public administrators became 'smarter' in their approach to address the housing problems of needy citizens.

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