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Positioning Latin America within the Southern Turn in Planning: Perspectives on an “Emerging Field”

Conclusion to the Special Issue on Latin America

Daniel Galland and Pablo Elinbaum

Abstract: The conclusion to this special issue on the state of planning in Latin America provides a series of critical reflections based on the cross-comparative analysis of its seven contributions. Rather than summarising the results embedded in the survey, we allude to the thematic questions posed in the introduction by responding with thought-provoking, argument-based counter-questions as revealed by each of the section headings comprising this conclusion. To make a contribution towards positioning planning in Latin America as an emerging “field” within the Southern turn in planning, the following sections suggest a series of research trajectories whose underlying rationales build on the exposed perceptions around significant planning problems across the region.

1 Present status of planning: an “induced” planning disarticulation?

Planning in Latin America has been historically shaped by a series of contingent economic, socio-cultural and socio-political driving forces where the influence of indicative forms of planning, liberal political ideology and other supranational modes of intervention have determined the role of this region in the international division of labour. The institutional contexts and instrumental contents of planning are generally “disarticulated” in the sense that national planning systems tend to lack structural coherence and implementation capacities within and across existing administrative levels. This disarticulation is herein labelled “induced”, partly because of the path-dependent centralism inherited from colonial regimes in each individual country, and partly due to external economic and political driving forces associated with post-colonial and imperialist powers since the advent of the first international division of labour, which have favoured the tendency to concentrate economic and political power in capital cities such as Mexico City and Buenos Aires.

While some countries such as Mexico, Brazil and Uruguay have actually institutionalised national planning frameworks over the past decades, spatial planning systems throughout the whole region mainly display a disarticulated character in terms of policy institutions, policy instruments and modes of implementation across different levels of planning. However, all countries do rely on administrative structures constituted by three basic levels of government (national, state/provincial and municipal), which allow them to address generic spatial planning objectives with a clear sectoral approach (e.g. environmental or cultural heritage policies). Planning at the national level has the role of steering and implementing specific countrywide policies to enable legislation toward, inter alia, planning of metropolitan areas (e.g. in federalist cases such as Mexico and Brazil) or facilitating peace processes in complex and conflictive contexts of armed groups (e.g. Colombia).

At intermediate scales, metropolitan planning has undergone long periods of development in different countries as evidenced by legalistic frameworks such as Brazil’s Metropolis Statute, which has allowed the drafting of comprehensive metropolitan plans. However, the development of metropolitan regions often-times contradicts the plans implemented for regional balance, as evidenced in Colombia. The conflicts that arise from the equitable distribution of national budgets and the articulation of policies at different administrative levels reveal the persistence of the path-dependent centralist development vector. Such territorial dynamics partly explain the special legal regimes of some capital cities, such as Buenos Aires, which as an autonomous city tends to function as a gated jurisdiction within the wider metropolitan space. Another type of intermediate-scale planning has to do with regional plans implemented on an ad hoc basis. Amongst these stand the Chilean strategic plans, implemented for situations of environmental risks; the Colombian contract plans, designed to build large infrastructures of

supralocal scope; or the Argentinian micro-regional plans, developed for the management of medium-sized conurbations.

However, the “institutional lightness” of planning at intermediate scales shows that the disjointed condition of planning frameworks and the lack of formalised implementation might also prove efficient by allowing planning interventions to take place on an ad hoc basis, i.e. where planning is needed most. This state of planning disarticulation has thereby allowed for technical and social innovations, typically running alongside the archetypal bureaucratic processes associated with more formalised planning systems of the ideal comprehensive-integrated type as evidenced in some western European nation-states in the late twentieth century (Galland, Elinbaum 2015). Despite inefficiency connotations, hence, “disjointed systems” might also offer a possibility of subtle operability.

Lastly, local planning in Latin America is best defined in legalistic and land-use terms. Conventional imported instruments such as zoning and building regulations are commonly used in most countries. Local planning can similarly be an expression of innovation as in the case of Colombian municipalities, where there is a double system of regulatory and territorial plans. The former allows for the management of municipal budgets during four-year mandates, while the latter entails long-term plans aimed at implementing major public works while steering land markets. In practice, however, the highly acclaimed municipal autonomy has primarily resulted in the decentralisation of planning functions and responsibilities oftentimes without the concomitant transfer of capacities and resources. In other cases, such as the Mexican “free municipalities” (*municipios libres*), there is even a lack of fiscal competences. The technical and budgetary dependence thereby binds municipalities to national-level policies and to the verticality of political parties, which works in practice as a parallel planning system.

The rescaling of planning policies affecting local urban development is evidenced in at least three types of interventions. First, in the case of major business districts, which facilitate the investment of global finance in the new elite quarters of capital cities, e.g. Puerto Madero in Buenos Aires, Puerto Maravilha in Rio de Janeiro or Santa Fe in Mexico City. Secondly, in the construction and concession of large infrastructure projects such as the public transport system of Santiago (Transantiago). And third, in the case of housing policies such as Argentina’s

Pro.Cre.Ar, a programme of social credits implemented by the federal government on a top-down basis, which has produced indirect negative effects in urbanisation processes at local and metropolitan scales.

2 The eclipsed discourse of planning as a means to overcome underdevelopment and its enduring legacy: planning as urban growth and management or lack of planning discourses?

Dados and Connell (2012) define the Global South in relation to “an entire history of colonialism, neo-imperialism, and differential economic and social change through which large inequalities in living standards, life expectancy and access to resources are maintained” (p. 13). This definition is reminiscent of the discourse of planning as a means to overcome underdevelopment (De Mattos 2012), which has become widely institutionalised by national governments since the advent of the post-WWII era. Influenced by an array of international organisations, the structuration and institutionalisation of planning discourses in Latin America should be understood in light of agenda setting at national and supranational levels. Widely disseminated by UN-funded organisations such as the Economic Commission for Latin America (CEPAL) and the Latin-American Institute of Economic and Social Planning (ILPES), the generic discourse to overcome underdevelopment in economic and social terms across the region was initially influenced by indicative planning and policy ideas that travelled from western Europe (De Mattos 2012).

Specific planning themes in pursuit of sectoral development, such as infrastructure, transport, housing, energy and environmental resources management, have been more recently selected by Latin American nation-states in predisposition to international development financing organisations such as the Inter-American Development Bank. This is elucidated by virtually all countries in the region, but most notably in the cases of Brazil and Argentina, where both public and private entities are largely funded by these organisations through national government agencies. As elsewhere, development capital is often allocated for urban development purposes in connection to megaprojects within greater metropolitan areas (e.g. business districts), a situation that consequently demands further economic liberalisation as well as the privatisation of planning

functions. Development capital has thereby increasingly become an agent of planning in these contexts as evidenced by the increasing rates of financialisation and real estate capital appreciation (De Mattos 2016; Rolnik 2012, 2013).

Substantial and rather complex planning issues evocative of direct socio-spatial implications are less reflected upon by the media (see point 4 below). Urban informality and marginality, for instance, which afflict urban and metropolitan space in every country are contingently defined and constructed by national governments. The framing of these wicked issues has relevant political implications given that levels of poverty and inequality as well as housing deficits are largely contingent upon these oftentimes random and overly subjective definitions.

At the same time, there is limited evidence as regards how planning discourses embraced by the media relate to planning issues raised by professional disciplines, which clearly prioritise and legitimise certain themes in relation to their own knowledge claims while undermining others. This entails the competition between professional disciplines in the framing of planning problems. At the same time, it is worth noting that the themes that dominate academic planning discourses might not necessarily relate to the current socio-spatial or environmental challenges as framed by national governments or to the media's focus or coverage of planning themes. This discrepancy needs to be further addressed in prospective research.

Finally, other planning challenges related to the increasing rates of urbanisation and urban sprawl that widely affect metropolitan areas in Latin America are partly addressed by national governments from legalistic perspectives, particularly in the largest and most populated countries in the region (Brazil and Mexico). The swift and largely uncontrolled urbanisation of several metropolitan areas has generated excessive demand for space and has challenged local government institutions, which commonly lag behind urban transformations. The metropolitan management agenda has emerged as a reaction to the mismatch between functional territory and institutional territory, and is reminiscent of the spatial coordination and governance challenges faced by many European metropolises during the 1960s and 1970s, which led to the establishment of metropolitan governments at the time (Lefèvre 1998). Furthermore, planning discourses that relate to urban transport demands as well as environmental risks seem to converge in scope across the region despite the diverse economic and political

realities. However, such discourses tend to diverge in scale in the sense that national governments and international financing institutions largely endorse, treat and determine planning agendas on an ad hoc basis.

3 The constant gap between planning theory and practice – between professional lobbying, geopolitical imposition and cultural protectionism?

The gap between theory and practice is constant in the field of planning, although it is also the product of different cultural, political and socio-economic approaches. In spite of the immense diversity of practice modes and the wide plurality of educational offerings, the separation between theory and practice is twofold. It is initially perceived through the production of knowledge stemming from planning experiences, which is still incipient and lacks systematisation (with the exception of some historical accounts of plans and biographies of planners).

In contrast, applied theory has developed in at least three directions. The first refers to the competition between different professional fields, where the prominence of architects has imposed in almost all Latin American countries. For instance, a professional lobby established by law in Brazil evokes the exclusive competence of architects when it comes to drafting plans. Secondly, most planners are educated “in situ” within the sphere of state ministries, secretariats and planning departments at different levels of planning administration. Despite routine management-centred learning, there is evidence associated with clear planning traditions, such as the rational-comprehensive of Mexican or Peruvian planners, or the southern European “urbanism”, mostly exhibited in Argentina, Colombia and Uruguay. Finally, the imposition of external consultancies that result from growing financing of planning by international agencies such as the IDB or the World Bank has influenced the link between academia and practice, as evidenced by the creation of so-called “university extensions” as well as consultancies carried out by several universities. In many cases, scientific theoretical frameworks are diluted through generic arguments, where concepts become slogans, such as the notions of sustainability, smart cities, compact cities, place-making, (apolitical) governance and so on.

Regarding university education, there has been an attempt to design curricula that aligns with mainstream international theories (with

an emphasis on Spanish instrumental legalism). However, as Ortiz (in this issue) points out, academic programmes seldom match the problems of grounded practice. This explains why newly trained planning professionals find it difficult to implement their academic knowledge in practice. On the other hand, we find some academic programmes that rely on localistic theoretical frameworks limited to Latin American scientific production, where English literature has a marginal impact on the education of most students, despite the fact that most universities have access to international academic databases. In addition, many Latin American researchers have a (well-founded) prejudice against the top-indexed Anglo-Saxon journals that arguably attempt to impose their problems and methods on southern countries. This is one of the reasons behind the creation of Latin American indexing institutions, such as REDALYC or CAPEL, whose aim is “to promote an alternative to asymmetries in the distribution of scientific knowledge” (Lopez, et al. 2008). “Planning”, as a generic term, is replaced by “planeamiento”, “planificación”, “planeación”, “urbanismo”, which are some of the neologisms that appear in some well-known Latin American journals of planning, such as Colombia’s *Bitácora*, *Cuadernos de Geografía* and *Cuadernos de Vivienda y Urbanismo* or Chile’s *EURE* and *Revista INVI*, to mention a few.

However, disconnection is not everything between theory and practice. It is worth mentioning productive experiences “made in Brazil”, such as the application of participatory budget and recovery of surplus value mechanisms, or the renewal of the favelas in Colombia, supported by a conceptual basis originated in situ. The long tradition of Latin American research also stands out in terms of peace-building, informality and community planning, although these theories have neither made it into the legal and bureaucratic frameworks of national governments nor onto the short-term agendas of political parties. A final restriction is the shortage of funding for basic and applied research in planning, as it is often not a priority on the agendas of the “new right” governments in the region.

4 An ill-fated macro-region? The continuous reproduction of socio-spatial disparities

From the perspective of local governments, the question of socio-spatial inequality in general and of urban informality in particular has been

primarily addressed as a technical concern, i.e. through imported land-use planning instruments and digital technologies (see examples of Colombia, Argentina and Mexico) that yield local planning regulations and zoning maps. The adoption of state regulatory practices in handling informal settlements via selective land-use planning and management tools has been largely influenced by international financial institutions such as the World Bank. Framing urban informality as a purely technical issue, however, oftentimes leaves material implications related to property titles and urban services largely unresolved (Connolly, Wigle 2017). At the same time, the propensity to incorporate these instruments alongside the deployment of spatial technologies into processes of regularisation of “informal” settlements raises questions about the discretionary character of land-use planning, the social construction of informal settlements, and the role of the state in continuously reproducing socio-spatial disparities as well as social class divisions (ibid.).

Socio-spatial issues of urban inequality or urban informality are generally dealt with by the press in rather sensationalistic terms, and problems of regional disparities are disregarded considerably in essence. Images that juxtapose wealthy and deprived neighbourhoods are standard means in tabloid media and popular journalism sources in Argentina, Brazil, Mexico and Colombia – the countries with higher degrees of regional discrepancies.

In most countries, maybe with the exception of Uruguay, there is a double scale of segregation, namely the local (spatially manifested through the duality of gated communities and misery belts or shanty towns) and the global (taking point of departure in post-colonial relationships). The reproduction of socio-spatial inequalities shows how the political character of planning remains largely unquestioned by the planning sphere and practicing planners at different levels of administration.

5 A technocratic and autonomous planning education – between specialisation and craft?

Planning is interdisciplinary in practice, but multidisciplinary in terms and modes of planning education in different schools and universities around the world (see Ortiz, in this issue). This dilemma demonstrates the contrast between the place of planning knowledge in each academic field and the know-how produced by

professional practice, and how this influences – or not – the political definition of urban problems, objectives and policies.

The first question has to do with attempts to incorporate the competences of the professional field within university graduate education. More than an institutionalisation process, it is a free interpretation of practice, as shown in the great diversity of teaching modalities and contents. In most cases, planning is a minor subject area within the curricula of schools of architecture and, to a lesser extent, of schools of geography. Since 2000, postgraduate programmes in planning have been created in all the countries of the region, including specialisation courses and Master's degrees; Colombia, for example, has 24 Master's programmes. Most of them are delivered by private institutions, and only a few are accredited or evaluated by state educational quality control agencies.

Another important point is the geographical scope of university education in planning. In general, the oldest educational institutions are located in national capitals, as in Mexico, whose main institution is the Colegio de México, founded in the 1960s. However, the trend in some countries (i.e. Colombia, Argentina, Brazil) is the decentralisation of new programmes in secondary cities. More than a concrete demand, new programmes are incorporated in the educational curricula of provincial public universities for competitive reasons, based on a historical centralist-federalist rivalry (i.e. Rio de Janeiro-Sao Paulo; Buenos Aires-Rosario-Córdoba; Medellín-Bogotá, etc.). It is also important to highlight the role of some autarchic institutions linked to education and above all to research activities. Among the most well-known are the Observatory of Metropolis in Rio de Janeiro, the National Association of Postgraduate and Research in Urban and Regional Planning (ANPUR) in Belo Horizonte, the Center for Urban and Regional Studies (CEUR) in Buenos Aires and the Interdisciplinary Center for Urban and Regional Development (CIDU) in Santiago, nowadays hosted at the Catholic University of Chile.

The second important aspect concerns the approach of planning education in relation to professional experience. Most graduate and Master's programmes focus on modes of planning rather than planning processes. In general, planning instruction focuses on "urbanism" and instrumental skills rather than on critical thinking or practical reflection. As Ortíz points out, the majority of planning education ignores the problems associated with demo-

cratic processes, territorial inequalities, environmental impacts and social conflicts.

Moreover, although almost all countries within the region show an accelerated institutionalisation of planning education, the number of active planners who hold formal planning education is certainly low. Training "in" state planning organisations prevails, which indicates that planning is more closely linked to craft than it is to academic education. This may be the aspect that best characterises the current state of planning education in Latin America.

6 Transfer of planning knowledge – between the colonialist tradition and the discovery of the autochthonous?

The transference of ideas, as Latour (1992) points out, is a process of translation rather than a process of reception, rejection, resistance or acceptance. This aspect is central to the configuration of modern urban planning in Latin America insofar as the transfer of ideas from both Europe and the United States has influenced it. Ideas that were spread in the course of the same strategy throughout the continent achieve, in some cases, their incorporation into government agendas while influencing policy shifts. However, this embeddedness was always given through a particular translation in each national and local context. The latter is the argument advocated by cultural historians when they emphasise the local specificity of some planning practices and narratives. In any case, the translation of knowledge between the "invention" of the indigenous is part of the DNA of Latin American planning. In practice, the transfer of knowledge can be explained in relation to the presence of networks of researchers and the dissemination of good professional practices.

As for the networks of researchers, their consolidation shows how academic exchange among Latin American countries has intensified in recent decades. Networks such as RELATEUR, RIDEAL and RII are just some of the groups that promote constant exchange and discussion, especially in the comparative study of planning policies. It is worth noting the case of Brazilian researchers, who try to go beyond the straightforward transfer of cases to integrate procedures and methods for producing statistical information with neighbouring countries through the Brazilian Institute of Geography and Statistics (IBGE), in articulation with multilateral organisations such as the Economic

Commission for Latin America (ECLA) and the Union of South American Nations (USAN).

The dissemination of good practices is the second issue that influences the transfer of knowledge in planning. In spite of the influence of the export of ideas throughout the last century, the exchange of knowledge between the countries of the region is relatively recent. This is due, on the one hand, to the lack of unified legal frameworks of planning that allow communicating the scope and content of the instruments, how they were used and with what results, as explained, for example, in the reports concerning spatial planning systems and policies published by the CEC (1997, 2006) in Europe. This has not prevented, however, the dissemination of “good practices” among the countries of the region. Successful interventions and projects such as Porto Alegre’s participatory budgets, implemented since the late 1980s, the TransMilenio public transport system in Bogotá or the Integrated Transport Network (BRT) in Curitiba have inspired and attracted numerous delegations of planners, politicians and researchers from all over the world, eager to learn from planning lessons established in the Global South. It should be noted, however, that many of these innovations, mostly Brazilian and Colombian, have been implemented in many other cities of the region in an almost “mechanical” way. The channel used for reporting these practices, namely city branding, shows the benefits of these planning interventions but omits addressing local specificities and other critical elements for their implementation.

Planning in Latin America as an emerging “field”? Potential contributions towards setting prospective research agendas

This special issue comprises a first effort towards analysing the idea of field as regards how the planning profession in Latin America has been and continues to be shaped amidst a series of contradictions stemming from the processes of institutionalisation between administrative lightness and the rise of academic programmes, and between a protectionist attitude against international theory and the continuous importation of foreign planning models. The concept of field as the social space in which planning practice shapes its influence as a mode of spatial intervention is particularly relevant, partly because it has the potential to enable the development of future understandings regarding the

specificity of urbanisation processes between the international division of labour and local cultural representations, and also in terms of the coexistence between the political parties that form parallel planning systems and the international organisations that define planning problems and implement their solutions.

These representations seem natural when more “formalised” planning systems, such as the European ones, are considered as common standards. However, beyond the universalising propositions – those that consider policies *tout court*, i.e. something good and valid for everyone as depicted by conceiving planning as an institutional technology (Mazza 1996) – planning systems are likewise social and historical constructions defined by cognitive, social and discursive dimensions (Servillo, van den Broeck, 2012). In this respect, further research regarding the contextual character of and historical causalities behind the structuration and adaptation of Latin American planning systems is essential (i.e. the relationship between the research axes herein outlined and the processes of colonialist institutionalisation that define and shape the preconceived understanding of actual problems).

This special issue has further sought to determine some underlying rationales concerning the state of key problems that qualify the overall character of planning across the region. This definition is relevant as these problems oftentimes coincide with general preconceptions lacking clarity. Most individual responses in this survey concur in their somewhat perturbing perceptions regarding the current state of affairs associated with different forms of planning in Latin American countries. In this respect, the reader should be aware of the fact that the contributors to this compilation, despite being natives of the respective countries they write about, have been educated in either Europe or North America, and several of them continue to reside and work therein. What is striking, however, is that such “outsider perceptions” concerning prejudice about inefficiency, fragmentation and bureaucracy in planning seem to match the judgment of many local academics and professionals.

In light of the above theoretical questions and their limitations, we support the view that a Global South perspective comprises an epistemological entry towards overcoming geographical connotations and, at the same time, an avenue to revise tacit notions such as “marginality” – a main form of production of urban space in Latin America (Roy 2009). Far from

the imaginary of unregulated spaces lying beyond nation-states' reach, marginality is not a form but a process that shows the conflictive relationship between social movements with and against the institutional framework of nation-states. The emergence of notions such as the "right to the city", "the social function of the land" or "democratic management" constitute novel ways to interpret planning policies. Despite the effort to incorporate these concepts into the formal frameworks of planning, an assemblage of denial, detour and deferral techniques filters them out.

The cross-comparative analysis has attempted to shed light on the specificity of planning in Latin American countries to spur academic debates beyond a purely technical or positivist understanding of planning. To make a contribution towards positioning planning in Latin America as an emerging field within the current Southern turn in planning, prospective research should also address the socio-spatial implications emerging from the continuous influence of international organisations on national development agendas. Similarly, an exploration into the "disjointed" character of planning systems in Latin America, which decouples itself from the supra-nationally imposed notion of "integration", can provide critical lessons and deeper analyses concerning the character of formalised, bureaucratic and routine-like planning processes both within and beyond this region. As put by Roy (2009: 828), "[w]hile much of urban theory has managed a traffic of ideas that routes concepts from EuroAmerica to the global South, there is an urgency and necessity to chart more intricate roots and routes. It is in this sense that the study of informality in Latin America can tell something profound about political regimes and politics in *all* cities".

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