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Introduction: Planning theories from ‘southern turn’ to ‘deeply rooted/situated in the South/context’: A project in the making

Chandrima Mukhopadhyay¹

Ahmedabad University, India

Corresponding author: chandrimamukho@gmail.com, chandrima.mukhopadhyay@ahduni.edu.in

Feras Hammami

University of Gothenburg, Sweden

with Vanessa Watson

University of Cape Town, South Africa

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Introduction

Over the years a growing number of planning and urban theorists located in, or writing on, planning and urban theories in the global South have argued that theories emerged on the basis of assumptions within a northern context that do not ‘fit’ or are not applicable in global South contexts (Rao 2006; Ferguson 2006; Watson 2009; Roy 2009; Myers 2011; Parnell and Robinson 2012). Hence, they maintain, there is a need to rethink the northern bias in planning and urban theory and to develop new concepts, ideas, vocabularies and practices from southern perspectives. McFarlane (2008) uses the term ‘southern turn’ in urban studies, while arguing that productive comparisons across contexts constitute an epistemological transformation in urban theory. He uses the term ‘urban shadow’ to explain how southern cities are considered marginal and on the ‘edges’ of a predominantly Euro-American oriented urban theory canon (McFarlane 2004; 2008). Rao dwells on Amin & Thirft’s (2002) *Cities: Reimagining the Urban* to develop her ‘slum as theory’ wherein she critically reflects on the dominant discourses that inform and guide planning and urban theory. In 2009, Watson (2009), a scholar based in the South, introduced the idea of ‘seeing from the south’ to explain the need for context-rooted theory development. Yiftachel (2006) introduced a South-Eastern

¹ This introduction was edited by Chandrima Mukhopadhyay and Feras Hammami alongwith Vanessa Watson based on several discussion sessions, as the call for paper was developed based on Watson’s work

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approach instead to break the binary of North-South and East-West. Roy (2009) calls for new geographies of 'imagination and epistemologies', as dominant theorizations are based on Euro-American experience, and are unable to capture the grounded reality of the global South.

Along these lines of thoughts, Myers (2011) suggest us to re-vision the ways in which cities in Africa are discussed and written about in urban studies in order to engage with the vibrancy and complexity of African cities with fresh eyes. Similarly, Parnell and Robinson (2012) argue for provincialisation of neoliberalism, a concept that emerged in the North, to make intellectual space for alternative ideas from the South, reflecting a more relevant reality for them. Beyond challenging the assumptions of theories that emerged in the North, they indicate how provincialising northern theories based on the grounded reality in the South are useful and of interest to those who are based in the South, and how building theories based on grounded realities in the South requires additional intellectual space due to its complexities. Agbenyo and Becker with Albrechts (2021) discuss provincialisation of 'strategic spatial planning' in the South in a Special Issue of the booklet series.²

One of the central issues that most of these scholars advocate is 'learning' from the south, or more generally across contexts. An understanding of a particular case (context) can be developed through 'theoretical propositions' which can then be tested out in other contexts. It is a process through which concepts / theories from the South will have to be gradually (inductively) built, and will have certain link to the context in question. This develops meso-level theorization, yet situated within a broader context and maybe relevant for some other regions of the world. The literature on southern planning theory is growing steadily, and more exponentially during the last two decades. From the 'southern turn' in urban and planning theories the literature has evolved to theories 'deeply rooted in the South' / 'situated in context', and very recent studies push the boundary to develop theories without a 'North'. Beyond the post colonialisation theories, decolonisation of planning theories and planning pedagogy and education is also growing steadily. This is not to say, of course, that a North-South comparative impetus has been lost in urban and planning theory. There is still a resilient tendency in some studies of Southern cities to engage with cities through the trope of copy/unique (McFarlane 2008, p. 344). We therefore see in this introduction to the special issue (SI) an urgency to advance new planning epistemologies whilst theorising from the South, to capture the realities on the ground, and build theories situated in specific contexts. We not only advocate learning from the south through meso-level theorisation, but also promote the anti-universalising approach and nature of the southern theory.

We organized this introduction so that we, first, conceptualises the global South, and, second, discusse why southern planning theorists have developed a critique of northern based planning theory. Finally, we consider some of the key areas of debate or disagreement amongst southern planning theorists. To explain the contributions of the articles and viewpoint as well as the introduction, we used the following three thematic sub-sections to present the third section: Planning philosophy and pedagogy: South to North knowledge transfer; Governance: Complexity in decision-making with a multitude of actors; and Theorising about Housing: Gentrification, Repairing and Distinctiveness.

Conceptualising the global South

The term global South has emerged relatively recently in the fields of planning, urban studies and development studies. Its origins can be traced back to the initial uses of the terms

² When published, the booklet will be available here: http://www.aesop-planning.eu/en_GB/booklet-series.

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'developed' and 'developing' countries that first emerged within the context of international development after the end of the Second World War. These terms were based on the belief that those parts of the world outside of the West (advanced capitalist economies) should follow a path of economic development taken in Europe and America in order to 'catch up' with Western notions of development. The 1960s was declared the First Development Decade by the United Nations and those countries considered 'underdeveloped' were urged to promote a strategy for economic growth. This terminology was subject to a growing critique and in 1999 the UN defended their use of the terms, as follows:

The designations 'developed' and 'developing' are intended for statistical convenience and do not necessarily express a judgment about the stage reached by a particular country or area in the development process (United Nations 1999: Preface)

In 2015, the World Bank announced that their categorisation of the world into 'developed' or 'developing' countries' has become less relevant, and instead presented data integration for regions and income groups: Low, Lower-middle, Upper-middle and High income. Indeed, this new grouping of countries promoted minor adjustment in the global economic and political structure. Yet, the stark divide between north and south is likely to continue, protected by the capitalist world systems. And the questions such as to what extent are the new categories responsive to the socio-economic changes of countries previously viewed as developing, and to what extent can they be viewed as a direct consequence of processes of capitalist expansion, are still somewhat left unresolved.

Another trope of the north-south political rhetoric is the term 'Third-World', which emerged in the aftermath of World War II, in service of (post)colonial strategies. It is claimed to have first appeared in Alfred Sauvy's writing in 1952, referring to countries that are not primitive, underdeveloped, or poor. Generally, Third World came to describe the countries that were unaligned with either the Communist Soviet bloc (allies of the Soviet Union) or the Capitalist NATO bloc (allies of the United States) after the WWII, or more specifically during the Cold War. It specifically speaks to the 'Third Estate' invention of the French Revolution, characterising the opposition to the French priests and nobles and enforcing social and political representations (Sauvy, 1952). However, Worsley suggested that Claude Bourdet had used the term 'Three Worlds' (without using 'third world') at least as early as April 1949 (Marcus 1958 cited in Wolf-Phillips, 1987, p.1311). How and for what purpose the Third World terminology was invented or appeared in the global representation of countries are relevant to the present debates on global South.

In recent years, the term global South has been used more frequently, to refer to Latin America, Africa and Asia, as a less pejorative term than either underdeveloped countries or the Third World. Clearly all these territories do not lie south of the equator, and countries such as Australia have historically been grouped with advanced capitalist economies, and it is the same with Singapore in Asia. Clearly, as well, parts of Latin America, Africa and Asia could also be categorised this way (China in particular) leading to the acceptance that the global south is not homogenous: the globe is made up of economic cores and peripheries, and there are cores and peripheries within these. To critically reflect on the diverging contexts of the non-North and as an alternative to the global South, Oren Yiftachel proposed the term 'south-east', making the following point:

'...there are no clear-cut distinctions between North and South, West and East, discourse and materiality or homeland and diaspora. These categories should be seen as 'zones' in a conceptual grid which attempts to draw attention to the main loci of power and identity within an obviously messy, overlapping and dynamic world' (Yiftachel 2006: 212)

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We also accept that the term global South refers to more than economic difference. As Dados and Connell (2012: 13) suggest, it

‘...references 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; and opens new possibilities in politics and social science’.

It is with this perspective in mind that we have scrutinized the term global South in this special issue. We critically reflect on global South as a concept and a historical process of domination, alienation and superiority. Although ‘global South’ is being used as a generic term, we acknowledge and appreciate the deep socio-political differences between and within the various geographical global South contexts, especially the urbanisation dynamics and patterns in cities located in, such as, Latin America, South Africa, South Asia, Western Asia, and East Asia. Hence, there are scholars who would be uncomfortable in generalising theories built up based on one context to another even within global South. The processes of modernisation, industrialisation, colonialism, settler colonialism, nationalism and even the ethnicisation of the nation have certainly been driven by diverging forces and resulted in unique socio-spatial and political realities.

In continuation, many theorists view the global South within the critical urban studies literature as an analytical tool, and not a geographical South. Considering global south as an analytical tool helps overcome the methodological barrier to conducting comparative urban research across North/South divides, as pointed out by Robinson (2011), discussed below. However, there is a debate on whether global South is an analytical tool. Simone and Pieterse (2017: x) employ a ‘majoritarian’ argument to define global South cities as those where ‘...the majority hold spatial, economic, political and ecological vulnerability’ and this is supported by Bhan (2019). However, using global South as an analytical tool facilitates comparative research between North-South. The next section outlines the main critiques of what is referred to as ‘northern’ planning theory, which have formed the basis of the southern planning theory project.

Critiques of northern based planning theory

Rationalities: Towards a ‘southern turn’

Since the 1960s cultural turn to development and associated processes of ethnicising the nation many scholars felt the urge to devote efforts to the project of (deepening) democratic revolutions. At the center of this project is the work of radical intellectuals, scholarly activists, and applied researchers whose task over time has pointed towards the development of new vocabularies that enable us to better comprehend people’s diverse experiences so that their struggle against oppression and subordination may become more effective. Among the other revealing shifts in planning theory is the engagement in planning as a focus of conflict rather than a rational process of choices and decision-making. For example, Flyvbjerg’s (1996) ‘real-life’ rationality suggests that we critically engage in context by asking ‘what is actually done’ instead of ‘what should be done’. Initiating and grounding planning in local values suggests an engagement in situated power relations. In this sense, the dynamics between rationality and power is critical in understanding what policy is about (Flyvbjerg 1998, pp. 164-65). Building on these ideas, Flyvbjerg and Richardson (2002) promote a Foucauldian approach to planning that reflects a more realistic picture of context, taking power into consideration. They also refer

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to Friedmann, who criticized planning theories for lack of treatment of power, even within the global North (Friedmann, 1997).

The approach to power and conflict in planning, and the impact of ignoring them on society has been developed by many other planning scholars. For example, Huxley (2000) criticizes communicative planning theory on the grounds of obscuring planning's problematic relation with the state, and hence, acknowledgement of the relations between power and inequality. The engagement of power and conflict in the development of planning theory brought notions of situational settings, and a range of other comparative context analysis models to the front of planning debates. However, while the lack of treatment of power and conflict in the planning theory and practices were applicable in the southern context as well, scholars working on the global South had discomfort in using theories that emerged in a very different context with assumptions based in the global North. Their focus on situational settings and comparative analysis across contexts revealed the the irrelevance of universalized theory as well as multi-levels of power play that underlay the unchallenged one-way transfer of planning knowledge and models from the North to the South. Some of these scholars were also concerned about the legacies of the colonial power and thereby sought to develop southern planning theory that can support the efforts of decolonising planning theory (Gunder *et al* 2017). The following section unpacks those assumptions by looking at the evolution of southern planning theory over last two decades, starting with a 'southern turn' in Euro-American theories, leading towards developing theories contextually rooted in the South, and developing theories without 'North'.

Key areas of debate in southern planning theory

We unpacked these assumptions here following four main sub-themes, i.e., theorising from the South, decolonising planning theory, governance and planning pedagogy and education, which are to some extent interrelated. These sub-themes are not only key areas of debate in southern planning theory but they also form a common ground for the contributions of this special issue.

Theorising from the South: Situated in context

Lawhon and Truelove (2019 p.1) outline three distinct iterations of southern urban critique: 'the south is empirically different; Euro-American hegemony works to displace a diversity of intellectual traditions; and the postcolonial encounter requires the critical interrogation of research practices'. Roy (2009) calls for new geographies of 'imagination and epistemologies', as dominant theorizations are based on Euro-American experience, and unable to capture the grounded reality of the global South, in terms of 'worlding of cities, production of space and dynamics of exurbanity'. Watson (2016, p.32) argues that 'a more recent southern turn' across a range of social science disciplines, and in planning theory, suggests the possibility of a foundational shift toward theories which acknowledge their situatedness in time and place, and which recognize that extensive global difference in cities and regions renders universalized theorising and narrow conceptual models (especially in planning theory, given its relevance for practice) as invalid. Inspired by his exploration of a South-Eastern perspective, Yiftachel (2009) introduces the concept of 'gray space' to explain the multiple struggles for urban space, rights, and resources which develops between, what he terms, 'whiteness' of legality/approval/safety and 'darkness' of 'eviction/destruction/death'. In relation to discussing eviction/displacement, he uses the term 'from displacement to displaceability' explaining the vulnerable populations' potential of being displaced (Yiftachel, 2020). He also considers the growing inequalities and new relations of colonialism in urban politics, and

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thereby suggests the need for a ‘planning citizenship as a possible corrective horizon for analytical, normative and insurgent theories’ (Yiftachel 2009, p. 87).

Furthermore, ‘informality’ is a recurrent question in the south-north debates in which scholars increasingly pay attention to the unchallenged conception of urban informality as a setting, sector or outcome, ignoring its diverging processes and forms across contexts and its everyday lived realities. For example, Kudva (2009) explores ‘informalities’ that are dominant in southern cities through the lens of Lefebvrian theoretical framework. In this, she unpacks the mutually constitutive political and spatial practices of informality under different structural conditions. Beyond urban resistance and encroachment, she discusses other forms of practices such as open protest, collective mobilization, and violence, which could as well be acknowledged under vocabularies in southern theory. From a feminist perspective, Miraftab (2004) coins the term ‘invited’ and ‘invented’ space for citizenship to describe community-based activism as an informal arena of politics and citizenship construction where women and disadvantaged groups actively and effectively participate in decision-making. Other temporal, rapid, transnational and politically loaded forms of informality are those related to forced displacement and national power. Fawaz (2016) discusses the Syrian refugees’ process of negotiating access to shelter through slums in Lebanon where the government did not agree to the usual solution of camps. In this special issue, four articles contribute to the specific literature on theorizing about informalities in housing in the South. Stiphany’s article discusses use of big data situated in the context in Brazil. Cirolia *et al* theorises the informal occupation of formal built environment in South Africa, which is a context-specific practice in the South. Zadeh *et al*. theorise about north-south transition of the idea of social housing. Siqueira generates critical reflections on the classical definitions of gentrification from the South.

In light of these debates, context-driven approaches, including case study methodologies and comparative analysis, have become among the vital strategies to build theories beyond any North-South divide, leading to the literature on ‘what is being done’ from a southern perspective. For example, McFarlane’s (2004; 2008) southern turn in urban studies advocates comparison ‘as a strategy of indirect and uncertain learning in order to move away from a predominantly Euro-American-orientated urban theory’ (p.340). Robinson (2011, p. 1) points out that in spite of an analytical division of the worlds of cities into wealthier vs poorer, capitalist vs socialist, there has been very little research comparing across these divides, especially the North/South divide. She argues that as globalisation presents the rationale to do so, there are mainly two barriers in making such comparisons: one is methodological resources³, and the other is ‘prevalent intellectual and theoretical landscapes’ emerged from the North. Advancing McFarlane and Robinson’s position on comparative research, Galland and Elinbaum (2018), more recently, discuss the southern turn in planning in Latin America by comparing planning practices across different countries within Latin America. They explore planning interventions, contemporary forms of planning knowledge, and academic scholarship through comparison within the region (Southern America). Narayanan (2020), on a similar note, argues for developing southern theories without a North, with the example of narratives from street food sector actors in two contexts: Delhi and Colombo. Narayanan’s (2020) approach is closer to Bhan’s (2019) vocabularies. Bhan’s (2019, p.116) study on developing new action-oriented vocabularies ‘tied to the production of forms and theories of practice’ is the newest development within southern theory literature. Such vocabularies are developed as both time- and space-bound, however, these ideas could be methodologically tested elsewhere as well. Calderon and Westin (2021) use comparative research from two case studies in India and

³ We argued above that considering global South as an analytical tool can potentially remove the methodological barrier, even though the idea of ‘analytical tool’ is not fully accepted.

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South Africa to argue that context-driven approaches to planning theory could be carried out by focusing on the interplay between institutional and agential factors, as analyzing context. Finally in the recently published booklet, 'Watson: Planning from the South: Learning from Academia, Praxis and Activism', within the AESOP-YA project of 'Conversations in Planning Theory and Practice', Watson relates her contribution towards the evolution of southern theory. The booklet includes an interesting timeline of her contribution towards southern planning theory and the development of concepts such as 'conflicting rationalities' and 'seeing from the south' (p.15).⁴

Decolonisation of planning theories

An important call behind suggestions such as developing theories based on realities rooted in the South (Narayanan, 2020) concerns the need to decolonise planning theories. Porter's (2006) stand on decolonizing planning theory and practice is through the undoing of planning ontology. Within Australian context, rather than ignoring the historical colonial context and impact of present planning practices, Porter calls for decolonizing planning so that its invisible spatial ontology that always acts as a basis of pervasive forms of colonial dominance, oppression and marginalization of the indigenous, becomes visible and challenged (Porter 2010, p. 18). In this, among the concretet suggestion is the engagement in the decolonization of planning theory through bottom-up approaches to planning (Cornelius et al., 2017; Seehawer, 2018). Fawaz (2016) proposes decolonization of planning through the lens of 'property effect'. With a case-study of land-use planning in Tebnine, Lebanon, she shows that planning interventions compliments the inequalities of property relations, and maintains the dominance of propertied representation of the landscape. She also argues that landuse planning institutionalizes structures of the property regimes in place, contextualized in historical and geographical political-economies.

A range of other calls for decolonizing planning can be drawn from the field of planning education (Wesley and Allen, 2019; Marques and Rishi, 2021). For example, Sunderasan (2019) discusses decolonization of urban pedagogy in India through his experience at a graduate level program. Sweet (2018) uses cultural humility as a lens to decolonize planning theory, education and practice. Bruns and Gerend (2018) promotes decolonial urban transformation by taking southern theories into consideration, and improving one's understanding of urban scholarship and sustainability science. There is an emerging literature on decolonization of planning theory where southern theorists are increasingly taking part.⁵

In this Special Issue we see how the vocabularies of Third World, developed-developing, and income groups were put at work, how they created new facts on the grounds, and how this has led to, and protected, sites of dominant representation, realities and knowledges of the world. These invented realities, representations and power-relations work within particular forms of governmentality (apparatuses of knowledge) (Lemke, 2002). Once a person, area, or period of history is included in one category, it implies an automatic attachment of a meaning to it. This Special Issue thus comes with new ideas, approaches, and conceptions from the non-North that are deeply situated in context, yet follow purposeful practices, informed by critical reflections and comparative analysis, and pointed towards making a specific contribution into the decolonization of planning theory.

Governance: Complexity in decision-making with multitude of actors

⁴ The booklet can be accessed here: http://www.aesop-planning.eu/uploads/watson_booklet-web_final.pdf.

⁵ A roundtable organised on decolonisation of planning theory organised by Hiba Abu Akar at Columbia University could be accessed at <https://www.youtube.com/watch?v=FhYti6FvBfA> ; last accessed on 12th June 2021.

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The classic southern theories on urban governance in the South focus on delivering just and equitable development through a range of actors from both formal and informal sectors. Miraftab (2009) coins the term 'insurgent planning' as a radical planning practice that responds to neoliberalisation through inclusive governance. She includes in the definition of insurgent planning a span of agents and activities, ranging from individual actions by 'ordinary' citizens, to collective, organized and purposeful interventions. In the Indian context, Benjamin's (2008) concept of 'Occupancy urbanism' is developed to address how both 'developmentalism' for the poor and 'globally competitive economic development' for the elite is politically dealt with and co-exists in the same context. Similar to Miraftab's (2009) 'insurgent planning', Benjamin (2008) argues that 'occupancy urbanism would help poor appropriate real estate surpluses via reconstituted land tenure to fuel small businesses whose commodities jeopardize branded chains' (Benjamin, 2008, p.719).

In the early debates on southern planning theory, Watson's (2003) argument on unpacking assumptions about how planning addresses challenges in varied contexts, by proposing the concept of a 'clash of rationality' (or conflicting rationality). She explained this concept as a clash 'between techno-managerial and marketised systems of government administration, service provision and planning, and increasingly marginalised urban populations surviving largely under conditions of informality' (Watson, 2009, p. 2259). Her explanation of this clash could be further discussed through the lens of governance as well. Watson's 'conflict of rationality' was central to our call for authors for the special issue. We seen in it an inspiration to supports our efforts to unpack the complexity of planning by re-emphasising struggle over space and territory, especially experienced in the global South as decisions are made in the intersection of formal and informal sectors, and justifies a 'southern turn' in planning theories.

'Governance' is defined as 'the way of governing'. Content-wise, 'governance' is discussed differently in the South both within academia and practice than how it is often discussed in northern contexts, reflecting the difference of the issues on the ground. Discussing urban governance in the southern cities focuses on decentralization of power from the national government through urban reforms, and the extent of success in implementing the reforms (Kamath and Zachariah, 2015). There are challenges to deliver equity and justice in urban development, to consider the significant role of civil societies in negotiating interests of vulnerable groups with the public sector and as to promote an extended form of public sector to implement pro-poor reforms in order to build peoples' trust on the public sector (Mathur, 2012). Public sector accountability (Mukhopadhyay, 2015) and corruption in planning (Chiodelli, 2019) are discussed under the broader umbrella of governance in order to improve democratic decision-making. Urban governance theories which emerged in the North often cannot be applied in the southern context. For instance, network governance emerged in the Dutch and Danish contexts advocates for public-private cooperation (Sorensen and Torfing, 2016), while the relationship is more conflictual in the South. This could be viewed as part of larger political agenda, and the public-private relation is matured over time.⁶ It also includes debates on Right to the City, discussion related to cross-subnational border migration of skilled and unskilled labourers, and their right to access basic services. The spatial scale of discussion ranges from local jurisdiction to regional scale. While a top-down approach for planning and implementing tools is followed in practice, understanding urban governance through the lens of efficient public participation in implementing the tools and delivering equity is still limited. For instance, Mahadevia *et al* (2018) evaluate the Town Planning Scheme, an innovative tool on land pooling and re-adjustment, on the ground of 'equity'. Similarly, Jillela

⁶ Informal conversation between Chandrima Mukhopadhyay and Andreas Faludi in September 2016.

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et al (2015) argue for inclusive planning processes through stakeholder involvement in order to deliver inclusive mass transit projects and Transit Oriented Development, as an innovative form of governance. The question however is how, and what opportunities the southern planning perspective may provide for a more just and social-equal urban change.

Learning from the South: Planning pedagogy and education

To further explore this question, it is imperative to illustrate how northern theory has dominated most of the scientific publication platforms (publishers of books, high-impact journals, etc), both in terms of authors and editors (Stiftel and Mukhopadhyay, 2007), as well as in research funding that is allotted by institutes located in the global North. Indeed, the past decade has witnessed an improvement in terms of both authorship and editorial board members in international planning journals from the global South, with certain limitations though. The impact however is still modest. One can still ask about the new realities this improvement has produced, and more specifically to what extent power-related vocabularies were translated into new practices and institutions, including democratic societies? Insights from political science suggests, as Chantal Mouffe observes while advocating liberal democratic principles of liberty and equality for all, that the liberal democratic ideals are promising but their problem is that these ideals are not put into practice in those societies.

As an alternative way forward towards an international planning education, Sanyal (2013) proposes a one-world approach to planning education, promoting an equal relationship in knowledge production and dissemination between the rich and poor countries. Marques and Rishi (2021), in another SI of Conversations in Planning booklet⁷, followed Sanyal's path and sought to further develop the one-world 'shared approach'. However, to southern theorists, the one-world shared approach is useful only in internationalizing the urban/city planning education system in the US. Rather than internationalization planning education, Weseley and Allen (2019) go a step further by proposing decolonization as an imperative road towards liberating planning education from the dominant global North in planning theory. A specific from-below approach is proposed in Winkler (2018). She discusses resistant texts, which are most often found in endogenous systems of knowledge production in an African context, as an approach towards decolonizing planning education, i.e., delinking from Western knowledge. Frank and Silver's (eds.) (2017) recent contribution discusses the origins of urban planning education, the experience of educating planners in selected countries and future trends of planning education in many countries across the globe.

Along these critical reflections on the transfer of knowledge and decolonization of planning, Mohsen in the SI discusses Lacanian's philosophical position in understanding southern planning theory. He, and several critical southern scholars, criticize lack of use of philosophical theories from the South. For instance, outside of the discipline, Manjul Bhargava, uses Indian ancient philosophical stances to develop theories in Mathematics. Wesley *et al.*'s paper in the SI bridges this gap to some extent by discussing generative 'Pedagogies from and for the Social Production of Habitat: Learning from HIC-AL School of Grassroots Urbanism'. Another contribution to the SI by Costa *et al* makes a call to move towards innovative southern-based pedagogy in planning education through Rooting metropolitan planning in critical theory and participatory practices. Furthermore, Wood (2020) discusses delivering an undergraduate module that teaches post-colonial concepts without relying on colonial constructs. He raises the questions: 'how do we locate the South without relying on concepts of otherness? and how do we communicate the importance of the South without re-creating the regional hierarchies

⁷ The booklet can be accessed here, when available: http://www.aesop-planning.eu/en_GB/booklet-series

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that have dominated for far too long?'.

The innovative southern-specific planning pedagogy and theorising about planning practices could lead to South to North transfer of knowledge as discussed in the following paragraph. Miraftab (2016) writes how communities from Togo and Mexico have been invisibly building communities in Illinois, the US, through the flow of migrant labourers, as they distribute their times both in their hometown and in the US. This is an excellent example showing how invisibly concepts of community building are already transferred from the South to the North. Many other scholars from outside the Urban Planning discipline also contributed to these broad debates. From the field of critical heritage studies. Harrison (2013) explains how Western-centric principles and models of heritage management have been transferred to the global South through the declared consensus among United Nations (UN) member states on the protection of the so called 'outstanding universal values'. In her thesis, *Uses of Heritage*, Smith (2006) explains how this consensus has since the 19th century been guided and protected by what she terms the *Authorised Heritage Discourse (AHD)*, not only driven by certain narratives about nationalism, but also a specific theme about the legitimacy and dominant place in national cultures of the European social and political elite'. From Sociology, Connell (2007) identifies a similar tension in social theory between the 'prestige' of being able to abstract statements to the extent that they can be portrayed as universally true, and the post-modernist counter-position that is suspicious of generalization per se. Connell (2007) promotes the idea of a new 'world social science' that includes voices from outside Euro-American world. Comaroff and Comaroff (2012: 1-2) in anthropology suggest that in the global South the impacts of North-South relationships have been most starkly felt.

Building on these efforts from urban planning and other disciplines, the special issue adopted the term global South to address the unjust effects of long history of inequalities that foregrounded an important aspect of planning theory and practice. These inequalities are felt across the globe in living standards, life expectancy and access to resources that are maintained as a result of colonialism, neo-imperialism, and differential economic and social changes. We use the term global South as an analytical tool rather than a geographical one, though the latter is still relevant to particular debates on decolonization. We certainly acknowledge the critical relevance of the other emerging terminologies and approaches such as the global South-East. We however choose to proceed in our intellectual endeavor following the term: the global South. Finally, the argument behind emergence of the divide between developed/developing, North/South is changed, from a southern perspective. Since cities and regions in the global South will continue to be largely urbanized in coming decades, as forecasted by international organisations (McKinsey, 2010; United Nations), and since the decision-making in urbanization process is way more complex than how it was during the rise of the developed countries, for instance, with impact of climate change, with much higher urban density, with a substantial population still living below poverty line, it is a fact that the global South should follow a different path of urbanization and economic development than what was followed by the Western countries and a different notion of development than the Western one.

Purpose of the Special Issue

It is within these efforts that the Editorial Board of *plaNext*—Next Generation Planning put out a call for contributions to a Special Issue of *plaNext* on planning ideas and challenges from the global South. They also invited Vanessa Watson as a guest editor for conversation but also critical reflection on the ideas and arguments presented in the call and the contributions to the SI. Published in 2019, the call attracted more than forty original papers in which their

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contributions were based on cases from planning practices within the ‘conceptual’ and not only ‘geographical’ global South, that could also explore South-South learning. We selected twelve manuscripts and invited the other excellent contributions to rewrite their papers as either viewpoints that can be included in the special issue or as manuscripts to be included in other issues published by plaNext. Out of the twelve accepted manuscripts on certain of these topics eight were developed into peer-reviewed manuscripts in addition to one viewpoint for the special issue. However, the spread of the coronavirus and its ongoing disease (COVID-19) and the dramatic changes it brought to our lives, including restriction on cross-border movement and some international scholars moving back to their countries of origin, made the completion of manuscripts impossible for several contributors. Finally, eight complete manuscripts and one viewpoint could complete the review process. In the following section we have thematically organised these contributions, following what we, the editors, interpreted as the main shared theoretical grounds.

Summary of Articles

Theme 1: Planning philosophy and pedagogy: Rooted in the South

In reconsidering planning theory and practice from the global South, relatively little attention has been given to the issue of planning pedagogy. In the first of two articles (Generative Pedagogies from and for the Social Production of Habitat: Learning from HIC-AL School of Grassroots Urbanism) which touch on this subject, Wesley, Allen, Zárate, and Emanuelli consider the role of popular education and critical pedagogy as levers for developing and articulating the agency of social movements in their struggles for recognition and justice. Negotiating whose knowledge counts, how and why, has been a decisive factor in situating the pedagogic trajectories of social movements in particular contexts and historical junctures. This raises the question of what pedagogies are adopted by social movements and the role of such pedagogies in developing more transformative epistemic framings of the urban. This requires bringing together the areas of critical pedagogy and social movements to better understand the realm of grassroots urbanism.

The paper draws on the example of the Habitat International Coalition in Latin America (HIC-AL), identified as a ‘school of grassroots urbanism’ (*Escuela de Urbanismo Popular*). The curricula of these schools are rooted in principles of autonomy, flexibility and collectivising action, and assembled through variegated pedagogic logics rather than following a pre-determined curriculum. Three key logics are discussed: learning is not a linear process but rather a reflective practice based on experiential learning; learning is transdisciplinary, creating synergies and dialogic spaces between different kinds of knowledge; and there needs to be the rapid expansion and multiplication of pedagogic capacities at scale.

As in the paper by Wesley *et al*, the paper entitled Rooting metropolitan planning in critical theory and participatory practices: A university planning experience in Belo Horizonte, Brazil, by Costa and Monte-Mór, also links pedagogy and planning practice. A metropolitan analysis and development of planning proposals for Belo Horizonte Metropolitan Region was conducted by university staff and students as an ‘outreach’ programme which linked research and education. The paper explains the educational and research process, the history of change in metropolitan planning in the city, the achievements of the engagement process, and the rooting of metropolitan and urban planning in critical theory and participatory practices, in order to contribute to southern planning theory. Participatory Local Interest Committees put into effect the Lefebvrian concept of *autogestion* (self-management). They helped perpetuate the struggles for autogestion and extend them ‘to all levels and sectors’, aiming at the social, cultural and political appropriation of space. The authors argue that this is a struggle for *the*

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right to the city, which has been the main purpose of progressive planning theory and practice in Brazil.

In effect this was planning education within the ‘social learning’ tradition – through a collective and reflexive process that involved not only faculty and students but also, by extension, several metropolitan and state personnel and community leaders who were involved throughout the participatory planning process.

This paper entitled A Lacanian Understanding of the Southern Planning Theorists’ Identification under the Hegemony of Western Philosophy by Mohsen investigates the meaning of Southern planning theory based on a Lacanian approach. It links to the question of pedagogy by asking how planning theorists’ identities are constituted through their interactions within academia. Mohsen argues that planning curricula, and planning theory courses in particular, adopt, internalise, and use hegemonic Western philosophy, ideas, and discourses as the only accepted mechanism of truth. This is usually the case whether planning schools are located in the global North or South. Where planning theory is taught this way in the global South it alienates southern planning theorists from their local context, as they often devalue, overlook, and neglect non-Western beliefs, ideas, knowledge, and philosophy. More broadly the professional identity of planners is shaped and normalised through their interactions and socialisations within academia and through the dominant ideology of how planners define and use space. Mohsen makes the links between Lacanian thinking and post-colonial studies, and later to decoloniality. These ideas have also influenced the southern turn in planning as well as in a number of other disciplines. However, the deployment of Lacan’s master signifiers such as ‘Southern’ reinforces the colonial hegemonic mechanism of power as the southern people, including planning theorists, are perceived as inferior.

Theme 2: Governance: Complexity in decision-making with multitude of actors

Of the two papers on governance in the global south, the paper entitled Inclusion in urban environmental governance of small and intermediary cities of the global South by Adelina, Archer, Johnson and Opiyo explores how urban sustainability is governed beyond the urban scale through trans-local networks and assemblages of actors and institutions, with a focus on small and intermediary cities of the global South. This focus questions the assumption by policy networks that increasing the adaptive capacities of primary cities will trickle down to the responses of smaller or poorer cities. The paper notes the recent paradigm shift in urban environmentalism termed ‘climate urbanism’, pointing to how urban sustainability projects are framed around addressing climate action as an economic opportunity, leading to the formulation of narrow goals for both climate securitization and social equity. Literature on these cases also identify how these climate infrastructures are funded by certain assemblages of actors such as global banks, policy institutions, and development agencies. The interest in the case studies in this paper is therefore to analyse the actors leading and financing the projects and the drivers of the intervention so as to explain differential outcomes in the inclusion processes and the framing of environmental solutions. This allows conclusions to be reached about the barriers and potentials for advancing ‘multi-level governance’ in small and intermediary cities in the global South.

This paper entitled Legacies of Mistrust: Why colonial imprints on the implementation of fiscal reforms in Mozambique and Mexico matter by Carolini and Hess considers fiscal decentralisation across Latin America and Sub-Saharan Africa, which has not been entirely effective. A central reason for these reforms has been public dissatisfaction with the delivery of services through highly centralised administrative systems. The design of these reforms is

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usually based on the experiences of high income countries, and the very different contextual factors in global South countries may be one reason for this lack of success. However, the authors argue that there is another reason, related to understanding the impact of colonisation in these regions. Based on studies of Mozambique and Mexico the paper examines how race-based caste systems introduced under colonial administrations fed the development and evolution of dual governance systems across spaces and peoples that bred mistrust between residents, local authorities and central authorities. Social mistrust born of racist colonial administrations meant that paternalistic relationships were leveraged to build social security and gain rents within marginalized spaces and peoples. In the post-colonial era such paternalism translated into a strengthening of patrimonialism within governments and fed conflicts between the intentions of actors involved in the implementation of reforms. The paper argues that fiscal decentralization theories need revision in their application within geographies of the global South in which local rationales and political experiences are deeply shaped by extractive and spatialized racist colonial administrative histories.

Theme 3: Theorising about Housing: Gentrification, Repairing, and Distinctiveness

Four papers in this volume scrutinize diverging issues of housing at the north-south intersection/paradox. The first two of these four explore informality in housing, using case studies from Brazil and South Africa, respectively. In her *South-North Scenarios: Reorienting Planning toward Future Informalities*, Stiphany demonstrates the importance of informal morphologies produced by urban redevelopment to societal development in the global South. She investigated two case studies of informal housing from São Paulo in Brazil and focused on the opportunities past insurgencies in the cases provided for change. They identified three, what she called, infrastructural insurgencies: making claims for land and infrastructure; revealing rental densification; and youth empowerment. Each of these evolved amid cycles of redevelopment, producing situated data, from below. Stiphany sees the importance of this form of knowledge for the future of housing systems in the global South, and argued that this knowledge is under researched. Stiphany argued that this little interest in community-based data production is likely to sustain 'an epistemic gap around the profound material transformations that shape and are shaped by informal settlement redevelopment'. For Stiphany, this knowledge is important to challenge traditional approaches to informal settlements, uncover spaces that most people cannot access, and understand how the production of this data from below is associated with a critical process of subjectification. The latter refers to self-effort of empowerment to take an active role in urban governance and redevelopment. In this context, Stiphany viewed the three infrastructural insurgencies as an action framework, which can support the efforts against displacement and other forms of exclusion.

Moving to South Africa, Cirolia, Ngwenya and Christianson investigate the informal occupation of existing formal structures and how this often ends with the placement of new meanings and values on these structures. In their paper, *Repairing, Repurposing and Renovating: Informal Occupation in Cape Town, South Africa*, Cirolia *et al* see the agency of occupation retrofit in the global South and their importance in city-making. The case study is the appropriation of a semi-vacant state-owned hospital building located in Cape Town, South Africa. The authors used documentary photography and interviews with residents to reveal the changes made in the public property to suit residential purposes. The empirical analysis showed that the processes of repairing, repurposing, and renovation the residents implemented in the building followed some sort of a logic of 'retrofit city-making'. Rather than adjusting the physical spaces as a shelter, the dwellers purposefully adjusted the physical spaces and infrastructure to meet their basic needs and leisure. As cities become more densely built and vacant land more

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peripheral or scarce, the authors argued that the retrofit of underutilised buildings, particularly through bottom-up actions such as occupations, will become an increasingly important mode of urban development not only in Cape Town but throughout the global South. For this reason, they advocated the need to rethink the role bottom-up informal settlement play in urban development. Not only are the practices of material transformation useful to understand, so too are the ways in which occupations reflect significantly more than simply survivalist strategies, but also care and meaning-making.

The third paper on housing searches for productive relations within the north-south paradox. In their *Distinctiveness of Housing Systems in the global South: Relevance of 'Social Housing' Approach to Meet Housing Needs*, Zadeh, Moulaert, and Cameron bring the challenging question of informal settlements in the global South into a dialogue with the celebrated models of social housing in the global north. Inspired by Weberian and Marxian theoretical traditions as well as State-failure and post-colonial theories, the authors identified five distinctive characteristics of informal settlements, or housing systems, in the global South. These are: the diverse facets of global financialization; the role of the developmentalist state; the importance of informality; the decisive role of the family; and the rudimentary welfare systems. Informed by these characteristics, they were able to describe two scenarios for the future of housing in the global South: the growing commodification of land and housing, following the blind forces of the global market; and the emergence of a universal role for social housing, yet with significant diverging conditions across the global South. They also explained that informality or unconventional methods of housing provision might become an inevitable option for low-income households to settle in cities or the peripheral areas. Through a comparative analysis of north-south housing systems, the authors considered the general validity of some features of social housing to the development of 'affordable housing', and thus advocated the need for a contextualized use of social housing models as a policy to deal with the present and future housing challenges in the global South.

In her viewpoint paper, entitled *Gentrifying the Brazilian city: convergences and divergences in urban studies*, Siqueira generates critical reflections on the classical definitions of gentrification. Dwelling on Glass (1964), she explains how much of the discussions of gentrification is still related to the transformation of existing urban housing stocks by new homeowners with a higher socio-economic profile, and this seems to hamper the efforts to better understand recent empirical data coming from Brazil and the global South more generally. Focusing on housing and gentrification in Brazilian cities, her viewpoint paper came to challenge 'the Northern empirical foundations of gentrification theory, and called for a new methodological approach to both classic and new cases. To situate gentrification in contexts, Marina suggested us to engage in gentrification as a process rather than an end-result. Through this process, as she argues, gentrification is operationalized, contextualized, and articulated with local patterns in space and time. She therefore encouraged scholars of gentrification to critically compare processes of gentrification across geography, challenging any defined north-south boundary to generate new ideas that can inform practice in contextual ways, including those with capacity to resist gentrification.

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