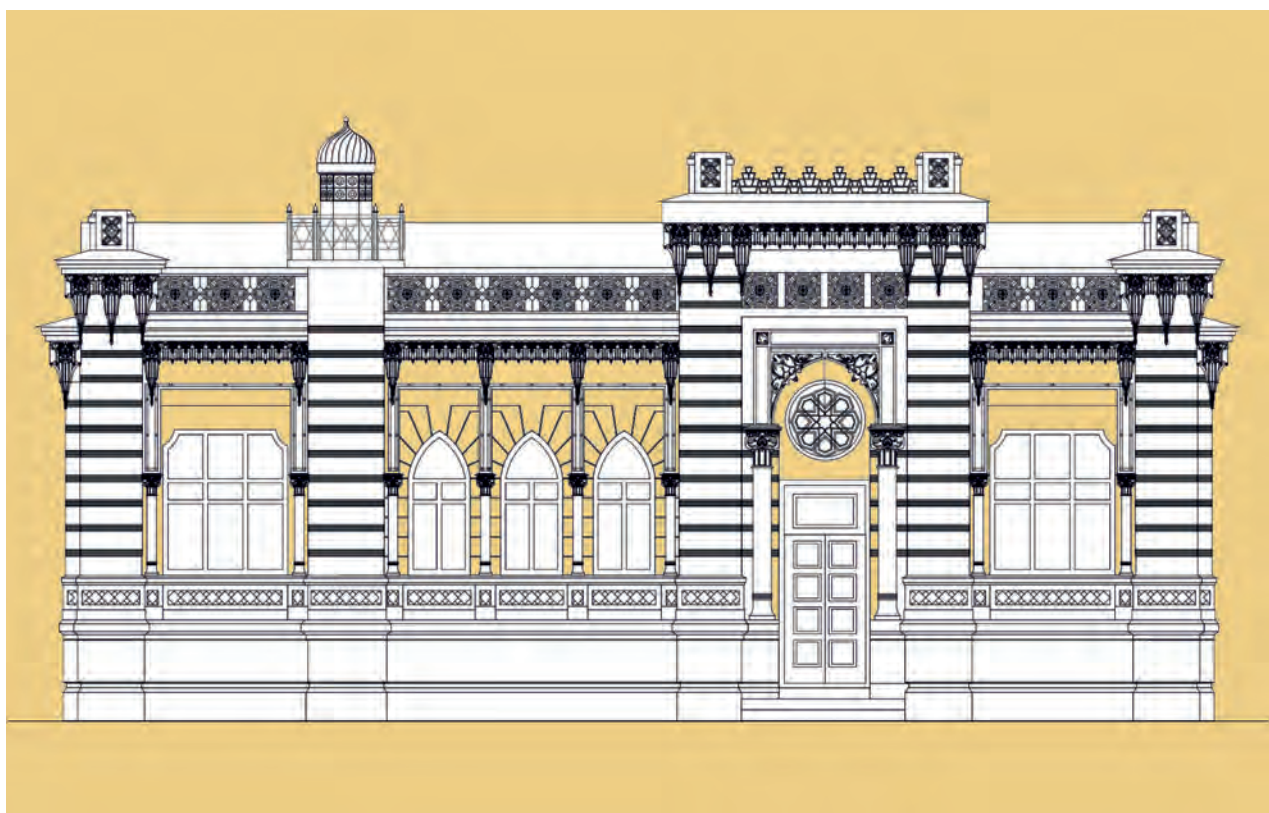


URBANI IZZIV

ISSN: 0353-6483

1

leto/year 2023
letnik/volume 34



Urbani izziv, letnik 34, številka 1, junij 2023
Urbani izziv, volume 34, number 1, June 2023

ISSN

Tiskana izdaja/Print edition: 0353-6483

Spletna izdaja/Online edition: 1855-8399

UDK/UDC: 71/72

COBISS.SI-ID: 16588546

Spletna stran/Web page: <http://urbani-izziv.uirs.si>

Naslovnica/Cover: Ilustracija/Illustration: Tetjana Savčenko/Tetiana Savchenko

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Urbani izziv ("Urban Challenge") is intended for the dissemination of research and technical information as well as the discussion of issues relating to spatial planning. The journal is published twice a year. The first issue is published in June, and the second in December. *Urbani izziv* is divided into two parts. The first (longer) part is titled "Articles" and includes original research, review articles, short studies and technical studies. Articles in this part of the journal are subject to blind peer review. The second (shorter) part of the journal is titled "Reviews and information" and contains reviews, announcements (e.g., announcements of books, projects, events, lectures, conferences, etc.), library information and other material. The material published in this part of the journal is not peer-reviewed. The journal is published in two languages: all contributions are published in Slovenian and English. Abstracts and full texts of articles are included in the Slovenian COBISS database and the Digital Library of Slovenia (dLib.si), as well as in the international bibliographic databases SCOPUS Elsevier, ERIH PLUS, EBSCOhost (Art & Architecture Complete, Academic Search Complete), ESCI (Clarivate Analytics), ProQuest (ProQuest Central), CEEOL (Central and Eastern European Online Library), IBSS (International Bibliography of Social Sciences), IBZ (International Bibliography of Periodical Literature in the Humanities and Social Sciences), GEODOK (Geographic Literature Database), EZB (Electronic Journals Library), CGP (Current Geographical Publications), ICONDA (International Construction Database), DOAJ (Directory of Open Access Journals), OCLC (Online Computer Library Center), Ulrich's Periodicals Directory, Academic Journals Database, Sciencegate, Index Copernicus International, J-Gate and Genamics JournalSeek. *Urbani izziv* is registered in the media register kept by the Ministry of Culture of the Republic of Slovenia under serial number 595. The journal is subsidised by the Slovenian Research Agency.

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Izdajatelj/Publisher

Urbanistični inštitut Republike Slovenije/Urban Planning Institute of the Republic of Slovenia

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Redakcija/Text formatting

Damjana Gantar

Prelom in računalniško oblikovanje/Layout and DTP

DEMAT, d. o. o.

Zasnova naslovnice/Cover layout

Nina Goršič

Tisk/Print

DEMAT, d. o. o.

Naklada/Print run

500 izvodov/copies

Letna naročnina/Annual subscription

40 € za ustanove/€40 for companies, institutions, 30 € za posameznike/€30 for individuals

Cena posamezne številke/Single issue rate

25 € za ustanove/€25 for companies, institutions, 20 € za posameznike/€20 for individuals

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Uvodnik

Del uredniških nalog je tudi pisanje uvodnikov. Včasih je težko, ker ni pravega navdiha, morda pa že pri naslednji številki ideja pride spontano in besede lepo stečejo.

V revijah vedno preberem tudi uvodnik. To sem počela, že preden sem postala urednica, zdaj pa je to nekakšna poklicna deformacija. Nekateri uvodniki nam lahko ponudijo zanimivo idejo ali raje vprašanje, povezano z aktualnimi tematikami, in nas spodbudijo h kritičnemu razmisleku. Nekateri drugi uvodniki so skoraj znanstveni ali strokovni članki. Besedila so večinoma pozitivno naravnana, morda celo aktivistično pozivajo k spremembam ali drugačnemu ravnanju (seveda v povezavi z vsebino revije). Iz vsakega uvodnika hote ali nehote odseva tudi avtor.

V zadnjem času nas zaskrbljeni poznavalci računalniških orodij, ki temeljijo na umetni inteligenci, svarijo pred zlorabo teh za pisanje – od šolskih nalog, izpitov do znanstvenih člankov. Kakšen uvodnik bi na temo urbanističnega načrtovanja napisal Chat GPT? Orodje sem preizkusila tudi sama in bila iskreno presenečena nad tem, kako hitro so se izpisovale besede ter kako smiselno in prepričljivo je bilo besedilo. Slog pisanja je navdihujoče pozitiven: *Mesta prihodnosti bodo odporna, vključujoča in privlačna za bivanje. (...) Načrtovalci bodo oblikovali mesta, ki bodo odgovarjala potrebam in željam njihovih prebivalcev. (...) Bistveno je, da vlade, oblikovalci politik in prebivalci prepoznajo ključno vlogo urbanističnega načrtovanja in podpirajo njegovo izvajanje s sodelovanjem, zagotavljanjem virov in dolgoročno vizijo. S tem lahko ustvarimo mesta, ki niso samo funkcionalna in učinkovita, temveč tudi živahna, harmonična in podporna, kar nam bo omogočilo, da bomo v urbanih okoljih prihodnosti dobro uspevali.**

Vse te lepo zveneče besede v enem zapisu vzbudijo vprašanje, zakaj jih tudi sami tako pogosto in nekritično uporabljamo. Morda bomo prav zaradi umetne inteligence spoznali, da je bolje z manj besedami povedati več in le to, kar je pomembno.

Damjana Gantar, glavna urednica

* Besedilo ni lektorirano. To je avtentični zapis Chat GPT-ja.

Editorial

Writing editorials is part of an editor's job. Sometimes this can be difficult if you are lacking inspiration, but then with the next issue an idea may come up spontaneously and the words simply flow.

I always read the editorials in journals or magazines. I did this before I became an editor myself, and now it has turned into a professional habit. Some editorials may present an interesting idea or raise an issue related to current topics, encouraging critical reflection. Others are almost like a research article in their own right. The texts largely have a positive orientation and perhaps even call for changes or different behaviour in an activist manner (of course in relation to the issues covered in the journal). Intentionally or not, every editorial is also a reflection of its author.

Recently, concerned connoisseurs of IT tools based on artificial intelligence have warned us of the possibility of misusing these to create practically any written text – from school assignments and exams to research articles. What would an urban planning editorial written by ChatGPT look like? I tested the tool myself, and I was pleasantly surprised by how fast the words appeared, how the sentences actually made sense, and how convincing the entire text was. Its style was inspiringly positive: “Effective urban planning holds the key to building sustainable cities that are resilient, inclusive, and livable. . . . urban planners can shape cities that serve the needs and aspirations of their inhabitants. . . . It is essential for governments, policymakers, and citizens to recognize the critical role of urban planning and support its implementation through collaboration, adequate resources, and long-term vision. By doing so, we can create cities that are not only functional and efficient but also vibrant, harmonious, and nurturing, enabling us to thrive in the urban environments of the future.”*

All these beautiful words make us wonder why we also use them so often and uncritically ourselves. It might as well be artificial intelligence that makes us realize that it is better to say more with fewer words and only what is really important.

Damjana Gantar, Editor-in-Chief

*This text was created by ChatGPT and has not been copyedited.

UDK: 711.4:364.4-053.9:551.588.7
doi:10.5379/urbani-izziv-2023-34-01-01

Prejeto: 16. 2. 2023
Sprejeto: 16. 3. 2023

Rümeysa BAYAR
Aysun AYGÜN OĞUR

Združitev odzivov na podnebne spremembe in tematskih področij starosti prijaznih mest: teoretični pregled

Avtorici sta se v članku osredotočili na starostnike, ki so zaradi svojega zdravstvenega stanja ter fizičnih in družbeno-ekonomskih značilnosti bolj ranljivi z vidika posledic podnebnih sprememb kot druge skupine prebivalstva. V svetu sta opazna dva trenda: naraščanje podnebnih sprememb in staranje prebivalstva, zlasti v mestih. Povezave med navedenima skrb vzbujajočima trendoma v teoriji in praksi niso jasne, zato so nujne splošne smernice, ki so preproste za uporabo ter bi vladam, ustanovam in skupnostim omogočile zadevne rešitve. Avtorici sta zato na podlagi kritičnega pregleda literature predstavili sedem tematskih področij na različnih ravneh, ki so poglobitna za načrtovanje starosti prijaznih mestnih območij, od-

pornih proti podnebnim spremembam: okoljsko varnost, obveščanje in družbeno angažiranost ter zdravstvene in socialne službe na ravni mesta, okolico in prevoz na ravni sosesk ter javne površine in toplotno udobje in stanovanjske objekte na ravni skupin stanovanjskih zgradb. Predstavitev povezav med omenjenima trendoma v okviru, predstavljenem v tem članku, prispeva h globalnemu ozaveščanju, oblikovanju ukrepov in usmerjanju politik.

Ključne besede: podnebne spremembe, starosti prijazno mesto, staranje prebivalstva, trajnostni razvoj, urbanistična politika

1 Uvod

Posledice podnebnih sprememb so že vidne po vsem svetu. Najnovejši izsledki kažejo, da izpusti toplogrednih plinov povzročajo taljenje ledenih plošč in ledenikov, višanje morske gladine in naraščanje temperatur površja. Višje temperature povzročajo spremembe v podnebnju, kot so izrazitejši in pogostejši vročinski valovi, močne padavine, suše in izredni vremenski dogodki. Ob upoštevanju količine preteklih in morebitnih prihodnjih izpustov toplogrednih plinov so mnoge od navedenih sprememb nepopravljive (IPCC, 2021). Mesta so središča goste poselitve najrazličnejših skupin prebivalstva, družbeno-gospodarskih dejavnosti, vladnih ustanov in strukturnih naložb (Hunt in Watkiss, 2011). Najnovejše urbanistične strategije se zato osredotočajo na prilagajanje naselij spreminjajočemu se podnebnju in blaženje negativnih posledic podnebnih sprememb. Večja odpornost na podlagi spodbujanja prilagoditvenih sposobnosti, zmanjševanja ranljivosti in odpravljanja tveganj je med prednostnimi nalogami lokalnih, državnih in svetovnih organizacij (Bulkeley in Tuts, 2013).

Po drugi strani skrb vzbujajo demografske spremembe, zlasti staranje prebivalstva po vsem svetu (Palacios, 2002). Navedene spremembe spodbujajo nove poglede in izzive v urbanizmu in urbanističnih politikah. Pojem starosti prijazna mesta izpostavlja, kako se lahko mesta prilagodijo demografskim spremembam na podlagi urbanističnega načrtovanja. Da bi spodbudila aktivno staranje in skrb za zdravje med starostniki, je Svetovna zdravstvena organizacija predstavila dejavnike, ki določajo starosti prijazna mesta (SZO, 2007). Priročnik, v katerem so ti dejavniki navedeni, je prvi in edini legitimni mednarodni dokument s tega področja. Aktivno staranje pomeni, da lahko starejši živijo v okolju, kjer lahko čim dlje zadovoljujejo svoje potrebe (Beard in Petitot, 2010). Podnebne spremembe pa povzročajo izredne razmere, ki lahko vplivajo na zdravje starejših in posledično njihovo sposobnost, da ohranijo aktiven življenjski slog v mestih. Zaradi zdravstvenega, fizičnega, finančnega in socialnega stanja so bolj ranljivi z vidika posledic podnebnih sprememb (Gamble idr., 2013; Carnes idr., 2014).

Neenakosti v ranljivosti so izpostavljene v znanstvenih razpravah s področja podnebne pravičnosti, v katerih se izpostavlja pomen lokalne angažiranosti ranljivih skupin pri sprejemanju podnebnih akcijskih načrtov (Hughes in Hoffmann, 2020). Mesta postajajo bolj zelena, trajnostna in odporna, ob prehodu k brezogljivi in bolj prilagodljivi družbi in mestom pa je treba obravnavati tudi položaj ranljivih skupin in podnebno pravičnost, da se navedene skupine opolnomočijo v procesu odločanja in se zmanjšajo neenakosti (Yang idr., 2021). Večina pristopov k oblikovanju starosti prijaznih mest ne vključuje parametrov podnebnih sprememb (Wang idr., 2021), kar ovira

odpravljanje razlik v ranljivosti in doseganje podnebne pravičnosti. Avtorici sta zato na podlagi kritičnega pregleda literature predstavili nove vidike preobrazbe v starosti prijazna mesta, odporna proti podnebnim spremembam. S povezavo ukrepov upravljanja podnebnih sprememb in starosti prijaznih mest sta predstavili bolj vključujoč in pravičen okvir za starejše, ki so bolj ranljivi z vidika posledic podnebnih sprememb.

Najprej so za boljše razumevanje morebitnih tveganj predstavljene posledice podnebnih sprememb za zdravje v urbanih naseljih. Nato sta avtorici obravnavali ranljivosti in neenakosti, s katerimi se spopadajo starejši in ki razkrivajo potrebo po podnebni pravičnosti. Na podlagi natančnega pregleda literature s področja prilagoditev mestnega okolja in blaženja posledic podnebnih sprememb sta nato oblikovali okvir za blaženje negativnih vplivov podnebnih sprememb na starejše. Avtorici sta nato kritično obravnavali dejavnike starosti prijaznega mesta ter opredelili razkorak med njegovo trenutno in zaželeno odpornostjo proti podnebnim spremembam. Na koncu sta predlagali nove dejavnike, ki omogočajo bolj celosten pristop, v katerem so upoštewane tako podnebne spremembe kot problematika staranja.

2 Posledice podnebnih sprememb za zdravje v urbanih naseljih

Več kot polovica svetovnega prebivalstva živi na mestnih območjih, ki so zelo občutljiva na podnebne stresorje. Hkrati naj bi delež starejših prebivalcev, ki so zelo ranljivi glede podnebnih vplivov, do leta 2050 znašal že 22 % (Združeni narodi, 2022). Po svetu že lahko opazujemo bolezni ter primere podhranjenosti in smrti, povezane s podnebnimi spremembami. Bolezni dihal zaradi izpostavljenosti vročini, mrazu in onesnaževalcem zraka ter bolezni, ki se prenašajo z vodo in se pojavijo po katastrofalnih poplavih, lahko v zadnjem desetletju povežemo s podnebnimi spremenljivkami. Napovedi kažejo, da bodo posledice podnebnih sprememb, ki jih povzročata človek, samo še hujše (IPCC, 2022).

V literaturi so v povezavi z izpostavljenostjo podnebnim spremembam največkrat obravnavana tveganja, povezana z vročino v mestih (Leyva idr., 2017), ki so posledica učinka mestnih toplotnih otokov, ti še okrepijo vplive vročinskih valov in povzročajo večjo tveganje za smrt in bolezni, povezane s kakovostjo zraka (Carnes idr., 2014). Zaradi visoke gostote pozidave v mestih, stavb in površin, ki vpijajo toploto, omejenega pretoka zraka in manj zelenih prostorov je na mestnih območjih večje tveganje za nastanek resnih zdravstvenih težav, zlasti med dolgotrajnimi poletnimi vročinskimi valovi (Haines in Patz, 2004; Carnes idr., 2014; Xie idr., 2015). Pogostost trajanja ekstremne vročine, ki presega sprejemljive pragove z zdravstvenega vidika,

naj bi se z nadaljnjim globalnim segrevanjem še povečala, s čimer se bodo v urbanih naseljih povečale tudi težave, povezane z vročino (IPCC, 2022).

Velik delež raziskav se ukvarja tudi z onesnaženostjo zraka na mestnih območjih. V najnovejšem poročilu Medvladnega foruma za podnebne spremembe (IPCC, 2021) je navedeno, da je tudi pri nizkih vrednostih izpustov toplogrednih plinov (po scenariju SSP1-1.9) kakovost zraka slabša, kot se zahteva po standardih Svetovne zdravstvene organizacije, zlasti na zelo onesnaženih območjih. Na mestnih območjih izpusti, ki jih povzročajo gospodarske dejavnosti, promet, spremembe v rabi tal, odlaganje odpadkov in potreba po energiji zmanjšujejo kakovost zraka, hkrati pa omejen pretok zraka povzroča zgoščanje onesnaževal. Izpostavljenost onesnaževalom povečuje pojav dihalnih in kardiovaskularnih obolenj, kot so astma, srčni infarkt in rak (Baja idr., 2010; Chang idr., 2022).

Velika grožnja za prebivalce obalnih območij je višanje morske gladine, saj to povzroča pogostejše in hujše obalne poplave in nevihtne valove. Ekstremni vremenski dogodki, kot so poplave, nevihte in močno deževje, poleg tega ne ogrožajo samo naravnih in grajenih okolij, ampak tudi življenje prebivalcev. Poplave imajo lahko hude posledice, kot so bolezni, ki se prenašajo z vodo, in epidemije, ki se začnejo širiti z onesnaženo pitno vodo (Gamble idr., 2013). Glavni razlog za večje tveganje na mestnih območjih so čedalje večje število nepropustnih površin, ki povzročajo ulične poplave ob močnih nalivih, in spremembe v rabi tal (Iqbal idr., 2022).

Ker so organizmi, ki povzročajo bolezni in epidemije, močno občutljivi na podnebne spremenljivke, podnebne spremembe vplivajo na vzorec okužb (Thomas, 2020). V nedavni pandemiji COVID-19 je umrlo na milijone ljudi (SZO, 2022), zlasti kroničnih bolnikov in starejših (Centers for Disease Control and Prevention, 2022a). Med pandemijo so vlade uvedle stroge ukrepe za preprečevanje okužb, med drugim so ustavile javno življenje ter uvedle strog nadzor nad gibanjem in karanteno. Hkrati je pomembno vprašanje postala zmogljivost zdravstvenega sistema, tudi v razvitih državah (Oğur idr., 2021). Pričakuje se, da bodo podnebne spremembe še povečale resnost in pogostost opisanih negativnih izkušenj doma in po svetu (IPCC, 2022).

3 Ranljivost in podnebna pravičnost za starejše

Nekatera območja po svetu že občutijo posledice podnebnih sprememb, pri čemer so skupnosti odvisne od ravni izpostavljenosti, povezane z geografskimi spremenljivkami, družbene, gospodarske in infrastrukturne občutljivosti ter sposobnosti,

da se prilagodijo spremembam in spremenijo sistem (McDermott-Levy idr., 2019; IPCC, 2021). Sposobnost skupnosti, da premagajo podnebne spremembe in si od njih opomorejo, je povezana z njihovimi gospodarskimi razmerami, izobraženostjo, bivalnim okoljem, dostopom do zdravstvenih storitev, tehnologije in informacij, velikostjo gospodinjstev, etnično pripadnostjo in spolom (Lynn idr., 2011; Rhoades idr., 2018). Zaradi svojih zdravstvenih in ekonomskih razmer ali družbene izključenosti so te družbene skupine bolj občutljive na nenadne pretrese. Poleg tega so se manj sposobne prilagajati kakršnim koli spreminjajočim se razmeram, saj imajo omejen dostop do informacij, finančnih virov in tehnologije. Opisana družbeno-ekonomska neenakost in infrastrukturna nepravilnost imata odločilno vlogo pri tem, kako hude so posledice (Phelan idr., 2004).

Starejšim posameznikom, ki spadajo v eno najranljivejših družbenih podskupin (Chang idr., 2022; IPCC, 2022), je treba zaradi njihove fizične, gospodarske in družbene prikrajšanosti nameniti še posebno skrbno obravnavo (Gamble idr., 2013; Carnes idr., 2014). Mesta morajo zagotoviti posebne storitve in podporo za njihovo dobro počutje in zaščito pred prihodnjimi tveganji (SZO, 2007). Stopnja smrtnosti, povezana s podnebjem, je zaradi večje obolevnosti in že razvitih zdravstvenih težav višja pri starejših (Balbus in Malina, 2009). Starejši se tudi ne zmorejo nemudoma odzvati v primerih hudih naravnih nesreč, kot so poplave (van Hoof idr., 2021). Poleg tega, da imajo drastične posledice za zdravje, navedeni negativni dejavniki omejujejo ali spremenijo njihov življenjski slog, ovirajo njihovo vključenost v javno življenje in slabšajo kakovost njihovega življenja.

Za spodbujanje aktivnega staranja je treba starejšim omogočiti, da se varno, samostojno, udobno ter ne glede na leta, dohodek in sposobnost vključujejo v javno mestno življenje in redne telesne dejavnosti. Navedeno se ujema s pojmom staranja v domačem bivalnem okolju, ki je prav tako ključen za oblikovanje starosti prijaznih mest (SZO, 2002; Centers for Disease Control and Prevention, 2022b). Grajena okolja in stanovanja slabe kakovosti močno vplivajo na dobro počutje starejših in povečujejo tveganja tako v njihovih domovih kot na prostem. Na primer, mestni prostor s slabšim toplotnim udobjem starejše odvrča od tega, da preživljajo čas zunaj – celo za izpolnjevanje osnovnih vsakdanjih potreb (Wang idr., 2021). Poleg tega se lahko zgodi, da morajo ljudje zaradi tveganja naravne katastrofe zapustiti svoje bivalno okolje in lastnino, posledična razseljenost pa lahko povzroči duševne, psihološke ali socialne zaplete in travme (Gifford in Gifford, 2016). Zato je pomembno, da se v urbane študije, povezane s starostjo in staranjem, vključijo tudi okoljski vidiki in da se problematika obravnava tudi z vidika podnebne in družbene pravičnosti.

Čeprav je starejša generacija bolj odgovorna za nastanek izpustov toplogrednih plinov kot mlajša, posledice teh izpustov najbolj prizadenejo prav starejše (Haq, 2021). Čeprav podnebna pravičnost temelji na okoljski pravičnosti in se osredotoča na neenakomerno porazdelitev posledic podnebnih sprememb po vsem svetu (Gardiner, 2011; Mitchell in Chakraborty, 2014; Schlosberg in Collins, 2014), je ni mogoče ločiti od družbene pravičnosti. Da bi zmanjšali občutljivost obravnavane prikrajsane družbene skupine, tj. starejših, bi se morala prostorska, družbena in gospodarska ranljivost v politikah prilagoditev podnebnim spremembam, blaženja njihovih posledic in prehoda v zeleno družbo obravnavati tudi z vidika pravičnosti (Brisley idr., 2012).

4 Metodologija

Avtorici sta v članku združili vidik mest, ki se odzivajo na podnebne spremembe, in načrtovanja starosti prijaznih mest. Uporabili sta metodo kritičnega pregleda literature, s katero sta želeli dobiti odgovore na naslednja raziskovalna vprašanja:

1. Kateri pristopi k načrtovanju mestnega prostora, ki se odziva na podnebne spremembe, upoštevajo tudi posebne potrebe starejših?
2. V kolikšni meri priročnik o starosti prijaznih mestih obravnava odzive na podnebne spremembe?
3. Katera področja združujejo ukrepe upravljanja podnebnih sprememb in ukrepe za oblikovanje starosti prijaznih mest?

Raziskava je potekala v treh metodoloških korakih. Najprej sta avtorici v literaturi pregledali vplive podnebnih sprememb na starejše v mestnem prostoru in morebitne blažilne pristope, na podlagi česar sta izluščili glavne pristope k oblikovanju mesta, ki se odziva na podnebne spremembe. Nato sta z vidika ukrepov za blaženje podnebnih sprememb kritično pregledali priročnik o starosti prijaznih mestih, ki ga je izdala Svetovna zdravstvena organizacija (SZO, 2007). Navedeni priročnik je prvi in edini legitimni dokument s področja starosti prijaznih mest, ki se tudi na široko uporablja. Nato sta avtorici združili pojma mest, ki se odzivajo na podnebne spremembe, in starosti prijaznih mest ter opredelili ravni in nova področja načrtovanja ustreznih ukrepov. Določanje ravni je pomembno za organizacijo načrtovalskih posegov in oblikovanje urbanističnih politik, saj se potrebe mestnih prostorov in njihovih načrtovalskih postopkov razlikujejo glede na prostorsko raven. Poleg tega se omenjene ravni nanašajo na upravni organ, ki izvaja izbrane posege. Čeprav se ravni lahko prekrivajo, bi bilo treba o nekaterih posegih odločiti od zgoraj navzdol. To pomeni, da jih je treba organizirati od zgoraj, druge potrebe pa je treba načrtovati od spodaj. Razlike med posameznimi ravnimi so opisane v nadaljevanju.

Raven mesta se nanaša na velikost in obseg celotnega mesta ali mestnega območja. Obsega vse stavbe, infrastrukturo in naravne pojave v okviru mestnih meja, pogosto sega tudi čeznje in vključuje tudi bližnja predmestja ali podeželska območja, ki so vezana na mesto. Pri načrtovanju na ravni mesta se upoštevajo dejavniki, kot so prevoz, stanovanja, gospodarski razvoj in javne storitve, ki vplivajo na celotno mesto.

Raven soseske se nanaša na manjše geografsko območje v mestu. Običajno obsega več ulic ali neko skupnost v mestu. Načrtovanje na ravni sosesk se osredotoča na edinstvene značilnosti soseske, kot so njena zasnova, arhitektura in demografska struktura, ter se nanaša na vprašanja, kot so prevoz, javni prostori in socialne storitve, ki vplivajo na kakovost življenja v soseski.

Raven skupine stanovanjskih zgradb v soseski ali mestu vključuje večstanovanjske stavbe, mestne vile ali enodružinske hiše, strnjene na nekem območju. Nanaša se na bivalno območje, ki je od bližnje infrastrukture oddaljeno do 15 minut hoje. Načrtovanje na ravni skupin stanovanjskih zgradb se osredotoča na vprašanja, kot so gostota, cenovna dostopnost in zagotavljanje potrebnih storitev in objektov, kot so šole, parki in javni prevoz. Cilj je ustvariti trajnostne skupnosti, prijetne za bivanje, ki ustrezajo stanovanjskim potrebam prebivalcev in hkrati izboljšujejo kakovost življenja na splošno.

5 Blaženje negativnih vplivov podnebnih sprememb na starejše

Mestna območja so središča družabnih, gospodarskih in kulturnih aktivnosti. Po eni strani zaradi tega prispevajo k nastanku izpustov toplogrednih plinov, po drugi strani pa so izpostavljena največjim tveganjem, povezanim s podnebnimi spremembami. Zaradi te medsebojne povezave imajo lahko mesta vodilno vlogo pri izvajanju ukrepov za blaženje posledic podnebnih sprememb, ki temeljijo na urbanističnem načrtovanju in oblikovanju (Rosenzweig idr., 2010). Pri spopadanju z negativnimi vplivi podnebnih sprememb urbana naselja zagotavljajo učinkovite možnosti za zmanjšanje izpustov, ki temeljijo na uporabi obnovljivih virov energije, trajnostni gradnji, javnem in zelenem prevozu ter ustreznem ravnanju z odpadki (zmanjšanju količine odpadkov, ponovni uporabi, reciklaži, odlaganju), in za okrepitev odpornosti proti podnebnim spremembam na podlagi zelene in sive infrastrukture, javnih storitev in vključujočega upravljanja. Rešitve so lahko tehnološke, družbene ali naravne ali pa združujejo več dejavnikov (Lin idr., 2021).

Posamezne rešitve, kot so klimatske naprave, se morda zdijo praktične, a še večajo odvisnost od energijskih virov in ustvarja-



Slika 1: Izpostavljenost podnebnim spremembam in glavni poudarek pristopov v grajenem okolju z vidika starejših (ilustracija: avtorici na podlagi pregleda literature)

jo stroške, kar ne reši ničesar. Za doseganje bolj enakovredno porazdeljenih koristi v družbi in večje učinkovitosti so najprimernejši urbanistični ukrepi na več ravneh hkrati (Milan in Creutzig, 2015). Najpogosteje se v zvezi z največjim tveganjem za zdravje – tj. z vročinskimi valovi, ki jih še krepi učinek mestnih toplotnih otokov – obravnavajo gradbeni materiali, svetloba, geometrija naselij in zelenje. Materiali z visoko svetlobno odbojnostjo, svetle barve ter zelene strehe in fasade zmanjšujejo pregrevanje površin (Milan in Creutzig, 2015; Francis in Jensen, 2017). Tudi ulice, poravnane s smerjo vetra (vetrni koridorji), prispevajo k pasivnemu hlajenju in zagotavljajo svež zrak (Ren idr., 2018). Dostopne in neprekinjene zelene osi so tudi učinkovita rešitev za hlajenje (ker dajejo senco) in širjenje naravnih rešitev po mestu na podlagi združevanja pristopov ekologije in prostorskega načrtovanja. Tudi zelena in modra infrastruktura kot naravna rešitev pomagata izboljšati kakovost zraka, saj delujeta kot ponor ogljika, z bolj propustnimi površinami preprečujeta poplave in izboljšujeta mestni ekosistem (Scott idr., 2016; Depietri in McPhearson, 2017; Frantzeskaki idr., 2019).

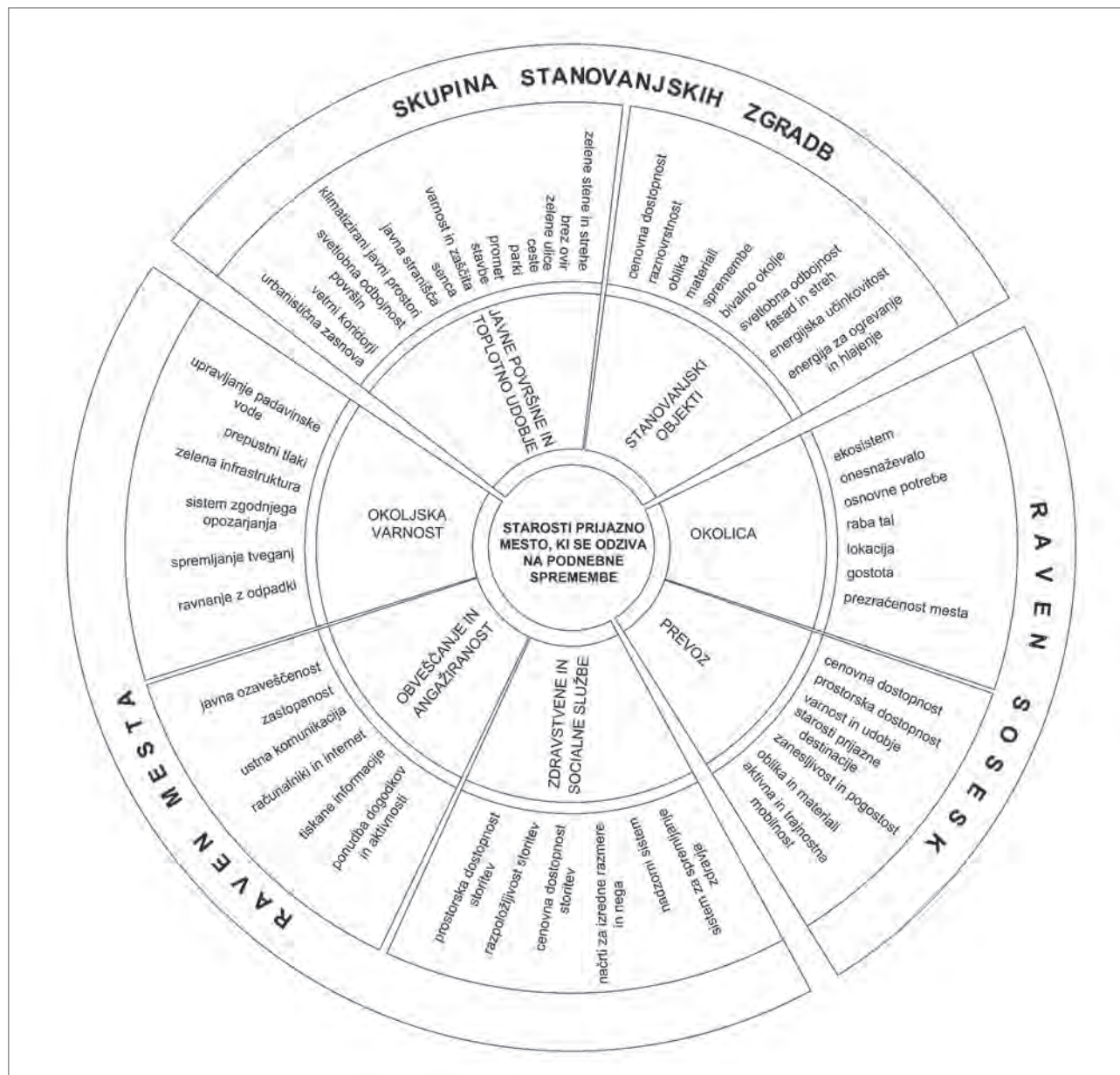
Družbeni ukrepi se osredotočajo na oblikovanje komunikacijskih in informacijskih kanalov za pošiljanje opozoril družbeno izključenim skupinam. Da bi dosegli ljudi, ki nimajo dostopa do interneta, je treba uporabiti več medijev (Brisley idr., 2012). Sistemi zgodnjega opozarjanja, ki zagotavljajo zanesljivo sporočanje in informacije, preverjeno preprečujejo smrtne žrtve zaradi vročinskih valov ali poplav. Druga kritična točka je učinkovitost zdravstvenih storitev v primeru sile ali nenadnega šoka. Učinkovitejši zdravstveni sistem ter nadzor in spremljanje vplivov podnebnih sprememb na zdravje starejših ljudi

omogočajo fleksibilne, hitre in učinkovite odzive (Bambrick idr., 2011). Na sliki 1 so navedene ključne rešitve, povzete iz literature, za upravljanje vplivov podnebnih sprememb v grajenem okoljih na starejše.

Čeprav se starosti prijazna mesta spopadajo s številnimi izzivi na različnih ravneh, povezanimi z dobrim počutjem in zdravjem starajočih se skupnosti, so podnebne spremembe okoljska ovira, ki jo je treba odpraviti. Razpoložljive smernice glede starosti prijaznih okolij večinoma ne upoštevajo vplivov podnebnih sprememb (Krawchenko idr., 2016). Za zagotavljanje zdravih, varnih in vključujočih bivalnih prostorov v času današnjih globalnih kriz, ki ogrožajo zdravje, je zato treba v okvir starosti prijaznih mest vključiti tudi odzive na podnebne spremembe.

6 Razširjeni okvir: starosti prijazna mesta, ki se odzivajo na podnebne spremembe

Predlagani okvir je razširjena kritična različica kontrolnega seznama o starosti prijaznih mestih, ki ga je objavila Svetovna zdravstvena organizacija (SZO, 2007) in je razdeljen na osem tematskih področij. Pri tematskem področju *javne površine in stavbe* je potreben večji poudarek na toplotnem udobju, izpustitih in nesrečah, povezanih s podnebnimi spremembami, poleg tega bi moralo navedeno področje vsebovati več ravni. Avtorici sta ga zato preoblikovali v tri kategorije na treh ravneh: *okoljsko varnost, okolico* ter *javne površine in toplotno udobje*. Področje *prevoz* sta ohranili, a sta ga razširili tako, da sta dali večji



Slika 2: Teoretični okvir starosti prijaznega mesta, ki se odziva na podnebne spremembe (ilustracija: avtorici na podlagi pregleda literature)

poudarek trajnostni mobilnosti. Področje *stanovanjski objekti* bi se moralo bolj osredotočati na energijo in toplotno udobje. Pri področjih *družabno življenje, družbeno angažiranje in zaposlitev* ter *komuniciranje in obveščanje* bi bilo treba predstaviti ukrepe za ozaveščanje o vplivih podnebnih sprememb. Avtorici sta jih zato združili v skupno področje *obveščanje in angažiranost*. Pri področjih *spoštovanje in vključevanje v družbo* ter *skupnostni programi in zdravstvene službe* manjkajo ukrepi za izredne razmere in pripravljenost na nepredvidljive zdravstvene dogodke, zato sta jih avtorici združili v področje *zdravstvene in socialne službe*, ki vključuje pripravljenost mestnih služb na nepredvidljive podnebne dogodke. Na sliki 2 je podrobno predstavljen teoretični okvir starosti prijaznega mesta, ki sta ga avtorici pripravili na podlagi kritičnega pregleda literature in

temelji na več ravneh: mestu, soseski in skupini stanovanjskih zgradb.

Raven mesta se osredotoča na tri razsežnosti, ki jih je treba obravnavati v mestnih politikah in strategijah: na okoljsko varnost, obveščanje in angažiranost ter zdravstvene in socialne službe. Okoljska varnost je ključna za pripravljenost na nepričakovane vremenske dogodke in nenadne naravne katastrofe, saj se starejši nanje slabo odzivajo. Zanje je zato ključen dostop do sistemov zgodnjega opozarjanja in obveščanja, da se lahko na tovrstne dogodke pripravijo in zaščitijo (van Hoof idr., 2021). Za vzpostavitev tovrstnega sistema je treba tveganja spremljati. Upravljanje padavinskih voda z naravnimi rešitvami (zeleno infrastrukturo in prepustnimi površinami) zagotavlja

varno in trajnostno mestno bivalno okolje (Jayasooriya in Ng, 2014). Hitra urbanizacija, zlasti v državah v razvoju, zaostrejuje zdravstvene težave, povezane z odlaganjem odpadkov, zato so trajnostnost, varčevanje z viri, zmanjševanje količine odpadkov, pogostejše recikliranje in vzdrževanje higiene nujni ukrepi pri ravnanju z odpadki (Giusti, 2009).

Področje *obveščanje in angažiranost* se nanaša na obveščanje starejših o politikah, kriznih ukrepih, dogodkih in načrtovalskem procesu. Starosti prijazno mesto ne more obstajati brez sodelovanja starejših pri oblikovanju načrtovalskih praks in politik ter njihove obveščenosti. Starejšim je treba informacije sporočiti prek več kanalov, na primer po internetu, televiziji, radiu in v tiskanih brošurah (Bukov idr., 2002). Poleg tega morajo imeti prostor, da izrazijo svoje mnenje. Starosti prijazno mesto, ki se odziva na podnebne spremembe, mora svoje politike začeti oblikovati z ozaveščanjem javnosti.

Področje *zdravstvene in socialne službe* je za starejše najpomembnejše. Na splošno starejši tovrstne službe potrebujejo in obiščejo pogosteje kot drugi (Abbing, 2016). Zato so dostopnost, primerna cena in razpoložljivost teh služb in dober nadzorni sistem, zlasti v gosto poseljenih mestih, osnovne zahteve, ki morajo biti izpolnjene (Gutman, 2007; Quinn, 2008). Odzivnost na podnebne spremembe zahteva načrtovanje za izredne razmere, ki je ključno za to, da se doseže starejše v primeru nenadnih ekstremnih dogodkov. Opredelitev tega, kateri posamezniki bi v primeru tovrstnih dogodkov potrebovali pomoč pri evakuaciji, je del učinkovitega načrta ukrepanja ob nesrečah (Balbus in Malina, 2009). Druga težava, s katero se spopadajo starejši, je omejena socialna mreža, saj se morajo ljudje po 65. letu upokojiti, pri čemer izgubijo socialne stike. Starosti prijazna okolja morajo zato podpirati in omogočati socialne interakcije ter okrepiti vključitev starejših v skupnost (Khosravi idr., 2015), saj se s tem starejši manj osamljeni, izolirani in depresivni (Finlay in Kobayashi, 2018). Vloga bivalnega okolja v navedenem procesu je, da omogoča priložnosti za vključevanje skupnosti z oblikovanjem družabnega mestnega okolja, skupnostnimi središči, ozaveščanjem in dogodki, ki ustvarjajo družabno okolje za vse ravni družbe (Menec idr., 2011; Buffel, Phillipson in Scharf, 2012; Khosravi idr., 2015; Garner in Holland, 2020).

Raven soseske se osredotoča na pomoč starejšim na podlagi zagotavljanja ustreznih prevoznih možnosti in kakovostnega okolja. Ker se mobilnost ljudi z leti manjša, starejši običajno preživijo več časa v svoji soseski, kjer zadovoljujejo osnovne potrebe in si ustvarijo socialno mrežo (Bayar in Türkoğlu, 2021). Navedena raven se zato nanaša na *okolico*, ki je povezana z značilnostmi naselja, in *prevoz*, ki se nanaša na mobilnost v soseski in zunaj nje.

Okolica mora biti zdrav ekosistem, ki zagotavlja svež zrak in v katerem so naselja, prijetna za bivanje, stran od virov onesnaženja in v katerih lahko ljudje zlahka zadovoljujejo osnovne potrebe in opravljajo vsakdanje aktivnosti (Gitlin, 2003; Sugiyama in Thompson, 2007). Pomembna je tudi lokacija naselij. Bližina virov onesnaževanja (npr. avtocest, industrijskih območij, gradbišč in odlagališč odpadkov) in večja izpostavljenost onesnaževalom, kot so NO₂, CO, SO₂, PM_{2,5} in PM₁₀, sta povezani z večjo pojavnostjo bolezni dihal (Dong idr., 2012; Gong idr., 2012; Simoni idr., 2015). Poleg tega imata gostota pozidave in usmerjenost ulic glede na smer vetra močan vpliv na učinek toplotnih otokov, kakovost zraka in sončno sevanje. Zelena infrastruktura je učinkovita, cenovno dostopna in uresničljiva strategija za izboljšanje mestne infrastrukture ter kakovosti okolja in zraka in vključitev ekosistemskih storitev v naselja (Ren idr., 2018; Baldwin idr., 2020).

Prevoz vpliva na mobilnost starejših in njihovo socialno vključenost v skupnost (Grimaldi idr., 2016). Spodbuja družabnost, zagotavlja dostop do mestnih objektov in infrastrukture ter izboljšuje duševno počutje starejših (Cvitkovich in Wister, 2001; Rosenbloom, 2009). Dostop do učinkovitega javnega prevoza starejše spodbuja, da ohranijo samostojnost v vsakdanjem življenju in se vozijo na kraje, kjer so lahko v stiku s skupnostjo, zato so samozavestni in aktivni ter ne trpijo za depresijo ali osamljenostjo (Metz, 2000; Rosenbloom, 2009; Holley-Moore in Creighton, 2015; Wong idr., 2017). Poleg tega so cenovna ugodnost, dostopnost in varnost javnega prevoza ključni dejavniki, ki starejše spodbujajo k njegovi uporabi (Broome idr., 2013; Wong idr., 2017). Pogostost, učinkovitost in razpoložljivost različnih vrst javnega prevoza zagotavljajo povezavo z mestom in samostojno mobilnost ter vplivajo na družbeno vključenost in dobro počutje starejših (Cvitkovich in Wister, 2001; Rosenbloom, 2009; Aguiar in Macário, 2017). Trajnostne, energijsko učinkovite in primerne oblike javnega prevoza pa pripomorejo k bolj zdravemu okolju.

Raven skupine stanovanjskih zgradb se nanaša na neposredno okolje, v katerem starejši preživljajo vsakdan. V njihovem življenju ima pomembno vlogo, saj zaradi slabše fizične aktivnosti in izgube socialne mreže več časa preživijo doma (Howden-Chapman idr., 1999). Stanovanjska ponudba mora zato zagotavljati različne in cenovno dostopne oblike stanovanj za vse ravni družbe (Mulder, 2006).

V zvezi s spodbujanjem aktivnega staranja se področje *javne površine in toplotno udobje* osredotoča hkrati na podnebje in potrebe starajočega se prebivalstva. Zaradi fizičnih in psihičnih sprememb postanejo starejši omejeni na zadevno okolje, ki pa mora izpolnjevati njihove potrebe, in sicer tako, da lahko do osnovnih storitev dostopajo peš (Sundquist idr., 2011; Jun in

Hur, 2015; Bayar in Türkoğlu, 2021). Javne površine, primerne za starejše, morajo biti dostopne, varne, dobro vzdrževane in zelene, hkrati pa morajo zadovoljevati osnovne potrebe mestnega življenja (Jackie, 2013; Garner in Holland, 2020). Od ustreznosti javnih površin je odvisno, kakšna je dnevna rutina starejših, koliko časa preživijo zunaj, kako družabni in samostojni so ter kako dobro se počutijo (Kim, 2010; Kloos in Townley, 2011; Astell-Burt idr., 2013; Thompson, 2013). Z vidika urbanističnega oblikovanja bi morali biti pločniki brez ovir, zaradi podnebnih vplivov pa morajo biti tlakovi prepustni, da se na njih ob nalivih ne zadržuje voda. Zelene površine, parki in ozelenjene ulice so pomembni sestavni deli skupin stanovanjskih zgradb, ki povečajo delež prepustnih površin in zagotavljajo senco, kar blaži učinek mestnih toplotnih otokov. Poleg klimatiziranih javnih prostorov in pasivnega hlajenja tudi zelene fasade in strehe, površine z visoko svetlobno odbojnostjo, geometrija mesta in vetrni koridorji zmanjšujejo energijsko porabo in zagotavljajo večje udobje v stavbah in na prostem (Milan in Creutzig, 2015; Aram idr., 2019). Bivalna okolja morajo imeti javna stranišča, morajo biti ustrezno osenčena, varna in v teh okoljih ne sme biti gost promet (McGarry in Morris, 2011; Dikken idr., 2020; Garner in Holland, 2020; Bayar in Türkoğlu, 2021).

Področje *stanovanjski objekti* se nanaša na značilnosti bivališč, v katerih starejši preživijo večino časa, in sicer zlasti na cenovno ugodnost, dostopnost, udobje in obliko. Stanovanjski objekti morajo biti oblikovani tako, da ustrezajo prostorskim potrebam starejših. Vključevati morajo vhode brez ovir in dvigala, poleg tega morajo omogočati lahek dostop do stanovanj (Burby in Rohe, 1990; Tinker, 1997). Drugo pomembno vprašanje z vidika blaženja vplivov podnebnih sprememb je poraba energije v objektu, zlasti za ogrevanje in hlajenje. Ogrevanje s premogom na primer povzroča številne težave, kot so onesnaženost zraka in izpusti toplogrednih plinov, zato je za starejše nevarno (Kerimray idr., 2017). Okolju prijazne in cenovno ugodne rešitve zagotavljajo sistemi obnovljivih virov energije in energijsko učinkovita gradnja – na primer uporaba svetlobno visoko odbojnih materialov in izolacije na fasadah in strehah, ki preprečuje pregrevanje (Milan in Creutzig, 2015).

7 Razprava

Članek temelji na zamisli o oblikovanju starosti prijaznega mesta, ki se odziva na podnebne spremembe. Zamisel je pomembna zaradi dveh izzivov, s katerima se spopada ves svet: staranja prebivalstva in podnebnih sprememb. Neena-komerna razporeditev podnebnih stresorjev povzroča neena-komerne posledice za mesta in njihove prebivalce. Mesta se pri spopadanju s podnebnimi spremembami ne ukvarjajo z vprašanjem, kdo bo čutil večje posledice podnebnih stresor-

jev, kar preprečuje podnebno pravičnost v družbi. Socialna ranljivost nekaterih skupin je povezana s prihodkom, spolom, narodnostjo, starostjo in civilno družbo (Lynn idr., 2011). Ukrepi za blaženje posledic podnebnih sprememb in načrti, povezani s posebnimi potrebami prebivalcev, lahko okrepijo ali pa zmanjšajo ranljivost navedenih skupin in podnebno nepravilnost (Fothergill in Peek, 2004). Ukrepi za blaženje posledic podnebnih sprememb morajo biti prilagojeni posameznim ranljivim skupinam, zato sta se avtorici osredotočili na večjo ranljivost starejših glede posledic podnebnih sprememb na mestnih območjih (Antal in Bhitani, 2022). Avtorici sta za reševanje te problematike predlagali pristop od spodaj navzgor, ki temelji na določanju ravni ukrepov. Tako sta določili tri ravni, ki posredno in neposredno vplivajo na starejše (tj. raven mesta, soseke in skupine stanovanjskih zgradb) ter so povezane s podnebnimi ukrepi, urbanističnimi politikami in temami s področja starosti prijaznih okolij.

Skupina stanovanjskih zgradb tvori ožje bivalno okolje starejših, ki je zanje zelo pomembno, saj so odvisni od storitev in družabnega življenja v svojem okolju. Preživljanje časa v mestnem okolju, čustvena navezanost na kraj, socialna mreža in občutek varnosti v znanem okolju so prvine, ki najbolj podpirajo staranje v domačem bivalnem okolju in življenje starejših nasploh (Buffel idr., 2012). Skupina stanovanjskih zgradb mora zato zagotavljati varno, udobno in cenovno ugodno bivalno okolje, ki se odziva na podnebne spremembe. Stavbe porabijo 30 % celotne energije in ustvarijo 27 % vseh izpustov toplogrednih plinov na svetu (Mednarodna agencija za energijo, 2022). Ukrepi, ki spodbujajo energijsko učinkovitost, uporabo obnovljivih virov energije in večjo toplotno udobje na podlagi izbire ustreznih materialov ter ustreznega oblikovanja stanovanj in urbanističnega oblikovanja, prispevajo k razvoju gospodarstva, varovanju okolja in boljšemu počutju starejših (Stephens in Allen, 2022; Wellecke idr., 2022).

Znano je, da starejši večino časa preživijo v svoji soseki, zato infrastruktura, raba zemljišč in objekti v zadnji soseki pomembno vplivajo na njihovo počutje in samostojnost. Učinkovit, cenovno ugoden in dostopen javni prevoz poveča njihovo mobilnost in družbeno interakcijo ter spodbuja njihovo vključevanje v družabne aktivnosti (Booth idr., 2000; Khosravi idr., 2015). Ob tem je izboljšanje javnega prevoza pomembna urbanistična strategija pri blaženju posledic podnebnih sprememb in uvajanju prilagoditvenih ukrepov ter pozitivno vpliva tudi na zdravje starejših. Promet ustvari 33 % vseh svetovnih izpustov toplogrednih plinov, zaradi česar je med glavnimi povzročitelji emisij in najhitreje rastoči sektor na mestnih območjih (OECD, 2020). Spodbujanje zanesljivega, udobnega in dostopnega javnega prevoza zmanjšuje potrebo po osebnih avtomobilih ter posredno izboljšuje kakovost zraka in zmanjšuje onesnaženost zraka, ki ga povzroča promet (Sun idr., 2019).

Industrijska območja, avtoceste in odlagališča odpadkov so viri onesnaženja in izpustov (Guttikunda idr., 2014), zato bi morali biti čim dlje od stanovanjskih območij ranljivih skupin. Tudi dobra prezračenost in vključenost naravnih površin v urbana naselja sta dejavnika, ki vplivata na kakovost zraka, saj preprečujeta kopičenje in usedanje onesnaževal (Kurppa idr., 2018), hkrati pa omogočata naravno hlajenje, ki blaži učinek toplotnih otokov (Gago idr., 2013).

Raven mesta se osredotoča na dejavnike, povezane z družbo, sistemi in upravljanjem. Obveščanje in učinkovit zdravstveni sistem sta glavna dejavnika za uspešno spopadanje s podnebnimi spremembami in staranjem prebivalstva. Starejši so namreč močno odvisni od zdravstvenih služb, ta odvisnost pa se bo zaradi podnebnih katastrof in njihovih negativnih vplivov na zdravje v prihodnje še okrepila. Pri razvoju mesta, odpornega proti podnebnim spremembam, je treba upoštevati povečane potrebe po pomoči v primeru nesreč, da se zmanjša obremenitev zdravstvenega sistema. Ker je neenakost pri dostopu do zdravstvenih storitev povezana z družbeno-demografskimi kazalniki, kot so revščina, stopnja izobrazbe in življenjski slog, je potreben celosten pristop k izboljšanju zdravstvenega sistema (Marmot in Bell, 2013). Lokalne izboljšave, ki spodbujajo aktivno staranje, varno okolje in staranje v domačem bivalnem okolju, prispevajo k zdravju in dobremu počutju starejših in zmanjšajo finančni pritisk na sistem nege (Allen in Glasby, 2010; Darton, 2022). Po priporočilih Svetovne zdravstvene organizacije (SZO, 2007) je treba starejše čim bolj vključevati v družbo in spodbujati njihovo sodelovanje v družabnih aktivnostih, da lažje premagujejo izolacijo in osamljenost. Navedeno je najlažje doseči z oblikovanjem informacijske mreže s skupnostmi in oblikovalci politik. Poleg tega je obveščanje o kampanjah, politikah in lahkem dostopu do aktivnosti, ki starejšim omogočajo, da se vključijo v prostovoljno delo, ključno za kakovost življenja, aktivno staranje in sodelovanje pri odločanju (Nazroo in Matthews, 2012). Obveščanje in opozarjanje o tveganjih, povezanih s podnebnimi spremembami, preventivnih ukrepov zoper naravne nesreče in posledicah podnebnih sprememb lahko rešita življenja ranljivih skupin.

Avtorici sta z raziskavo povezali najpomembnejša izziva 21. stoletja in predstavili smernice za prihodnji razvoj mestnih območij. Raziskava je poleg tega lahko izhodišče za razvoj podnebne odpornosti, pri čemer lahko mesta oblikujejo načrte za obvladovanje podnebnih tveganj in ranljivosti, ki pa morajo vključevati tudi starejše. Tri predstavljene ravni ukrepov se nanašajo na različna mestna okolja, a so tudi medsebojno povezana. Da bi preprečili prekrivanje in ponavljanje prostorskih odzivov, morajo biti ti usklajeni z načrtovanjem politik, ki upošteva socialno-demografske razlike med starejšimi. Ena izmed slabosti raziskave je ta, da je kritični pregled literature omejen na angleško literaturo, ki je na voljo na spletu. Druga

slabost je ta, da so kljub uporabljenemu celostnemu okviru starejši opredeljeni kot homogena skupina, raziskava pa se ne osredotoča na njihove specifične potrebe glede na spol, socio-loško ozadje ali ekonomski položaj.

Prihodnje raziskave bi morale predstavljena tematska področja proučiti na podlagi empiričnih študij primera, z uporabo kvalitativnih in kvantitativnih raziskovalnih metod, teoretični okvir pa bi moral biti podkrepjen s kvantitativno analizo podatkov na treh obravnavanih ravneh. Ker se večina razpoložljivih podatkov o podnebnih spremembah nanaša samo na regionalno raven, bi bilo treba lokalne podatke, potrebne za tovrstne raziskave, zbrati s posebnimi metodami. Opisani okvir pa bi lahko priredili in ovrednotili tudi za različne ravni mest (npr. metropolitanska območja), bolj poglobljene raziskave pa bi se lahko osredotočile na različne identitete in potrebe starejših kot heterogene družbene skupine.

8 Sklep

Z vidika izpostavljenosti podnebnim spremembam in njihovih vplivov na zdravje starejših bi se morali urbanistične strategije in ukrepi osredotočati na notranje in zunanje toplotno udobje, kakovost zraka, upravljanje energijske porabe, obvladovanje tveganj, varnost, izboljšanje zdravstvenih sistemov in vključevanje okoljskih rešitev v urbana naselja. Avtorici sta v članku predstavili pomen odzivanja na podnebne spremembe in oblikovanja starosti prijaznih mest z vidika podnebne in družbene pravičnosti. Staranje prebivalstva in podnebne spremembe sta dva neizogibna in nepopravljiva scenarija mest v prihodnosti, zato ju je treba nujno združiti v enega in na tej podlagi ustvariti bolj trajnostna, odporna in zdrava mesta. Avtorici sta na podlagi kritičnega pregleda literature izpostavili ključna tematska področja, ki jih je treba obravnavati pri oblikovanju starosti prijaznih mest, ki se odzivajo na podnebne spremembe, in predstavili praktičen kontrolni seznam za lokalne uprave.

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UDK: 338.484:502.131.1

doi:10.5379/urbani-izziv-2023-34-01-02

Prejeto: 8. 11. 2022

Sprejeto: 27. 3. 2023

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Razvijajoči se konstrukti množičnega turizma in kapitalistično izkoriščanje obale: od trajnostne gostote in urbane morfologije do ikoničnega megaobjekta

Konstrukt turizma je prelomna oblika kapitalistične produkcije prostora, ki ustvarja nove urbane oblike. V številnih arhitekturnih in morfoloških študijah so analizirali različne modele, manjkajo pa primerjave njihovih značilnosti. Avtorji so v članku primerjali štiri vrste turizma, povezane z razvojem kapitalizma (vključno s predfordizmom, fordizmom in postfordizmom), in različne vrste turističnih mest. V povezavi z gospodarskimi, socialnimi in kulturnimi značilnostmi so analizirali njihovo arhitekturno ikoničnost, morfološke vzorce in prostorsko metriko. Izsledki kažejo, da predfordistični in fordistični konstrukti turizma, za katere je značilna visoka gostota

ta zazidave, spodbujajo družbene odnose in povečujejo sposobnost ustvarjanja mesta, postfordistični konstrukti turizma z nizko gostoto zazidave pa povzročajo višje okoljske stroške (porast zasebnih zelenih in vodnih površin) in višje družbene stroške zaradi arhitekturne ikoničnosti. Avtorji so proučevali povezavo med arhitekturnimi in urbanističnimi spremenljivkami, ki bi jih bilo treba upoštevati pri načrtovanju turističnih destinacij v okviru kapitalistične produkcije turističnega prostora.

Ključne besede: obalni turizem, ikonična arhitektura, morfologija

1 Uvod

Turizem je tradicionalno opredeljen kot izraz kapitalističnega gospodarstva (Fletcher idr., 2021). Zdi se, da vsesplošno zmogostavje kapitalističnega modela onemogoča razvoj družbeno uravnoteženega in trajnostnega modela (Charley, 2010) in varovanje najosnovnejših skupnih dobrin (Hollerman, 2015). Gauthier (2005) opredeljuje turistično arhitekturo in morfologijo kot konstrukta. Konstrukt turizma je rezultat hitrih sprememb, povezanih z večjo stopnjo nenadzorovanega razvoja in eksperimentiranja. Kot navajata Knafou in Stock (2003), je turizem sistem, v katerem posameznik potuje in začasno živi v drugih krajih ter v katerem je prostor aktivno vključen v turistov prosti čas in rekreacijo. Konstrukt turizma je torej prostorski in fizični odziv na tri osnovne značilnosti turistične dejavnosti: potrebo po prevoznem sredstvu, dogodek ali izkušnjo kot razlog za potovanje in sistem nastanitvev.

Mobilnost je gonilo turizma (Coles idr., 2005; Urry in Larsen, 2012; Nebot-Gomez de Salazar, 2020), hkrati pa močno vpliva na podnebne spremembe (Gühnemann idr., 2021), kar je bilo opazno tudi med pandemijo COVID-19 (Yang idr., 2021). Turistična naselja so kraji, kjer prostor izgubi svoj strateški status in robustno naravo v progresivnem procesu izginjanja (Sparke idr., 2018), zanje pa sta značilna stalen pretok obiskovalcev in stalna potreba po spreminjanju njihovih izkušenj, da bi se izognili procesom zastaranja (Sanabria Díaz idr., 2020). Pritisk urbanizacije in turizma na obalna območja se povečuje ter močno vpliva na krajino (Petrișor idr., 2020). Dinamična narava turizma namreč ustvarja novo urbano morfologijo, zlasti na obalah, kjer odprt prostor pravzaprav sestavljajo trate in igrišča (Levy, 1999). Vpliv kapitalizma na turistični prostor je jasen z vidika aktivnosti in arhitekture. Turistični dogodki so popolni kapitalistični proizvodi, ki zavzamejo kraje in ustvarjajo pomene (Nogués, 2008). Dogodki lahko neposredno vplivajo na podobo mesta in njegovo sposobnost privabljanja turistov (Li idr., 2021). Arhitektura turističnih nastanitvev pa je mednarodni izraz zahodnega kapitalističnega gospodarstva ter predstavnik kulture množične potrošnje in sodobnega življenja (Britton, 1991).

Turizem je torej organizirana kapitalistična dejavnost, za katero je značilna družbeno in ideološko namerna produkcija prostora (Britton, 1991). Poznamo številne oblike kapitalistične produkcije turističnega prostora: na obrobni območjih, kot je Cancun, so se ohranili fordistični modeli turizma (Torres, 2002), za Dubaj so značilni hiperikonični postfordistični kompleksi (Elsheshtawy, 2010), v Združenem kraljestvu so preoblikovana predfordistična turistična središča (Agarwal, 2012), v Španiji pa fordistična (Antón Clavé idr., 2011). V številnih raziskavah so bili podrobno analizirani različni konstrukti

turizma. V študijah morfološkega razvoja turističnih krajev v povezavi s političnimi, gospodarskimi, socialnimi, okoljskimi in fizičnimi spremenljivkami so bila med drugim proučena zdravilišča (Agarwal, 2012; Xie idr., 2013) in obmorska letovišča v azijsko-pacifiški regiji (Smith, 1991, 1992), v Grčiji (Andriotis, 2006) in drugih sredozemskih državah (Lekakis in Chatzikonstantinou, 2020). Kljub vsemu močno primanjkuje raziskav, v katerih bi primerjali glavne konstrukte turizma posameznega kapitalističnega obdobja z vidika morfologije in arhitekture ter njihovih družbenih in okoljskih posledic.

Avtorji so primerjali značilne primere kapitalističnih konstruktovalnega turizma z vidika arhitekture, morfologije in prostorske metrike ter analizirali njihove posledice, med drugim družbeno segregacijo in vplive na okolje (npr. gostoto in delež vodnih in zelenih površin). Najprej so predstavili metodologijo, s katero so analizirali in primerjali razvoj petih izbranih konstruktoval, nato pa so na kratko povzeli povezavo med arhitekturo in različnimi obdobji kapitalističnega gospodarstva. V četrtem poglavju so predstavili svoje izsledke, ki kažejo, da je za izbrane predfordistične in fordistične konstrukte značilna bolj trajnostna urbana gostota, za postfordistične modele pa večji okoljski vpliv, družbena segregacija in ikoničnost. V petem poglavju so obravnavali povezavo med arhitekturnimi ikonografskimi parametri ter morfološkimi značilnostmi in prostorsko metriko, na koncu pa so predstavili še sklepne ugotovitve in omejitve raziskave.

2 Metodologija in študije primera

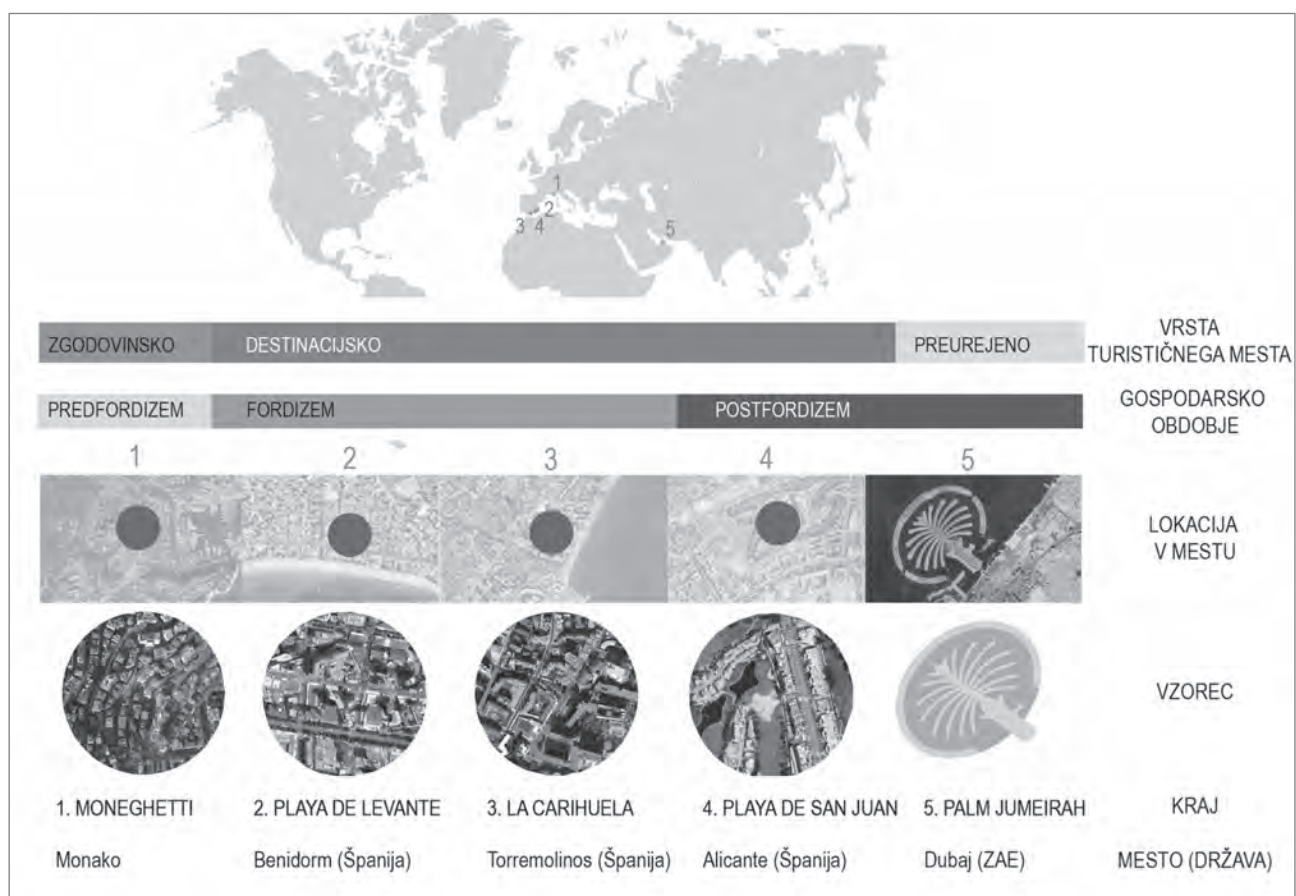
Levy (1999) loči dva glavna pristopa k proučevanju urbane oblike, pri čemer se prvi osredotoča na povezavo med vrstami stavb in mestnim tkivom, drugi pa na razvoj konstrukta turizma. V članku sta analizirana oba, in sicer na podlagi primerjave petih primerov, pri kateri je poudarek na družbeno-ekonomskem vidiku (kapitalizmu in arhitekturi) in fizičnih značilnostih (morfologiji in prostorski metriki). Pri družbeno-ekonomskem vidiku je grajeno okolje obravnavano kot neposreden izraz kulture; z drugimi besedami z vidika njegovega nastanka in razvoja je grajeno okolje družbeni proizvod (Gauthier, 2005), ki vpliva na povezovanje stanovalcev in turistov (Soszyński idr., 2017). Avtorji so za vsako gospodarsko obdobje pregledali literaturo, nato pa opisali arhitekturo ter ekonomsko in arhitekturno ideologijo, ki sta nanjo vplivali, na podlagi česar so analizirali vsakokratne arhitekturne in družbeno-ekonomske vrednote.

Z vidika fizičnih vrednot se urbana oblika običajno povezuje s prostorsko metriko v smislu kvantitativnih meritev, ki določajo prostorske značilnosti urbanih objektov in naselij (Reis idr., 2015: 330). Navedena metrika opredeljuje prostorske sestavi-

Preglednica 1: Razmerje med morfološkimi plastmi in izbranimi parametri urbanega vzorca

| Parameter | | Morfologija | | | |
|----------------|-----------------------------------|----------------|-------------------------------|--------|----------------------|
| Oznaka | Opis | Enota | Razmerje | Oznaka | Plast |
| A | Površina cest | m ² | $A + B = 100.000 \text{ m}^2$ | UL | Ulica |
| B | Površina zasebne parcele | m ² | $B = B_1 + B_2 + B_3 + B_4$ | | – |
| B ₁ | Bruto tlorisna površina pritličja | m ² | | PS | Pritlična stavba |
| B ₂ | Površina zasebnega prostora | m ² | | ZP | Zasebni prostor |
| B ₃ | Površina zasebnih vodnih površin | m ² | | VP | Vodna površina |
| B ₄ | Površina zasebne plaže | m ² | | | Plaža |
| H | Največja višina | število | | VS | Večnadstropna stavba |
| Z _p | Zazidana površina | m ² | $B_a = B_1 \times H$ | | – |
| U _g | Urbana gostota | – | $U_d = B_a / (A + B)$ | | – |

Vir: avtorji

**Slika 1:** Lokacije študij primera in značilnosti vsakega vzorca (ilustracija: avtorji)

ne v dinamiki sprememb (Herold idr., 2005), urbane vzorce turističnih naselij (Gkoltsiou in Terkenli, 2012) in prostorske vzorce obalnih turističnih območij (Antón Clavé idr., 2011; Rovira Soto in Anton Clavé, 2017). Avtorji so primerjali vzorce turističnih območij v pasu 1 km od obale, vsak vzorec ima

obliko kroga s površino 10 ha. Na podlagi zračnih posnetkov in kartiranja v aplikaciji Google Zemlja in programu GIS so šest morfoloških plasti povezali z devetimi parametri (preglednica 1) ter analizirali delež posameznih vrst površin in urbano gostoto. Urbana gostota (U_g) je enaka faktorju izrabe gradbene

parcele (FI) (MIT, 2019). Podatke o zazidani površini (Z_p) so avtorji pridobili iz zemljiške knjige ali pa so jo izračunali na podlagi bruto tlorisne površine pritličja (B_1) in največje višine (H).

Primeri za raziskavo so bili izbrani na podlagi časovnega zaporedja treh glavnih obdobij kapitalizma (tj. predfordističnega, fordističnega in postfordističnega), iz katerega so razvidne pomembne spremembe v konstruktu turizma. Judd in Feinstein (2000) ločita tri kategorije turističnih mest: zgodovinsko mesto, destinacijsko mesto, ki je zgrajeno posebej v turistične namene, in preurejeno mesto, v katerem se gradi infrastruktura za privabljanje turistov (slika 1).

Zgodovinska turistična mesta vključujejo zdraviliška mesta iz 19. in 20. stoletja. Na sredozemski obali je Monako eno najbolj obiskanih destinacij na svetu (Gjorgievski idr., 2013), vsekakor pa med najbolj obiskanimi v Evropi, podobno kot Las Vegas v Severni Ameriki, Johannesburg v Afriki (Fu in Murray, 2014) ali Macao v Aziji (Kwan, 2004). Za študijo primera so avtorji izbrali monaško sosesko Moneghetti-La Condamine.

Z vidika destinacijskih mest je bila v Evropi eksplozija množičnega turizma v času fordističnega kapitalizma značilna zlasti za špansko obalo, ta se je začela po šestdesetih letih 20. stoletja naglo preobraziti. Avtorji so izbrali tri mesta s španske sredozemske obale: Torremolinos, Benidorm in Alicante. Torremolinos je bil med prvimi letoviškimi mesti na Costi del Sol in je kot turistična destinacija v literaturi obširno analiziran (Navarro-Jurado idr, 2019). Je torej starejša turistična destinacija (podobno kot Acapulco v Mehiki), njena najbolj značilna soseska pa je La Carihuela. Benidorm in njegova soseska Playa de Levante sta najznačilnejši primer množične turistične destinacije na španski sredozemski obali (Nolasco-Cirugeda idr., 2020). Temelji na turističnem modelu, ki sloni na visoki gostoti zazidave in visoki gradnji. Soseska Playa de San Juan v Alicantu pa je primer prehoda v postfordistični model turizma, ki je povezan z golf turizmom ter se osredotoča na večjo kupno moč obiskovalcev in prenovo starejših destinacij (Ruiz idr., 2016). Vključuje konstrukt turizma, za katerega sta značilna bolj ljudska arhitektura in večji poudarek na zelenih površinah. Med preurejenimi mesti pa velja Dubaj za paradigmo postfordističnega neoliberalnega modela turizma. Umetni otok Palm Jumeirah, ki so ga avtorji izbrali za raziskavo, je primer turističnega mehurčka, ki vključuje kongresne centre, športne komplekse, velike kongresne hotele in nakupovalna središča z atrakcijami, zgrajenimi posebej za turiste, teh domačini ne obiskujejo (Feinstein, 2005).

3 Konstrukti turizma in kapitalistično izkoriščanje prostora

3.1 Kapitalizem in turistična arhitektura

V vsakem kapitalističnem obdobju so bili oblikovani drugačni konstrukti. Predfordistični konstrukt turizma se je nanašal na turistične destinacije za mestne industrijske kapitaliste iz višjih razredov od druge polovice 19. stoletja do druge svetovne vojne. Osredotočal se je na zimske turistične destinacije, pri čemer je arhitekturna turistična izkušnja temeljila na zdraviliških in igralnicah.

Ključno vlogo v razvoju turizma je imelo obdobje razvoja fordističnega kapitalizma (od leta 1945 do sredine sedemdesetih let 20. stoletja). Po drugi svetovni vojni je turistična dejavnost pri odzivanju na rast množičnega turizma sledila značilnostim industrije in fordističnega kapitalizma. Tudi arhitekturo je zaznamovala množična proizvodnja, ki temelji na čim večji proizvodnji ob čim nižjih stroških, kar se doseže s proizvodnjo velikih količin omejenih serij standardiziranih proizvodov (Watson, 2019). Množični turizem fordističnega kapitalizma je močno standardiziran in neprožen paketni turizem z veliko turisti (Torres, 2002). Z večjo dostopnostjo turističnih paketov za ljudi srednjega razreda in z višjimi plačami so namreč tudi delavci postali množični potrošniki tovrstnih storitev. Navedeno je bila posledica keynesianskega modela gospodarstva, ki ga je prevzela zlasti Zahodna Evropa, pri čemer je novi kapitalistični razred mednarodnih podjetij začel proizvajati turistični prostor (Yrigoy, 2014). Zaradi revolucije v prevozu in nastanitvah se je začela obsežna pozidava površin. Letala so omogočala potovanja do oddaljenih destinacij, zaradi česar ni bilo treba razvijati in graditi cestne infrastrukture. Velike razkošne hotele so nadomestili apartmaji z dnevno sobo, tropskim vrtom, solarijem, bazenom in prostori za razvedrilo. Od vsega začetka so modernistični arhitekti upoštevali funkcionalistično ideologijo mednarodne arhitekture, in sicer vse do zmagoslavja zamisli t. i. Ekipe X (ang. *Team X*) v projektu Languedoc-Roussillon, ki so ga zasnovali Candilis, Josic in Woods (1962–1977).

Prehod v postfordistični neoliberalizem je pomenil deregulacijo in deindustrializacijo kapitalizma, kar je povzročilo razvoj globaliziranega, individualiziranega in prožnega turizma (Bianchi, 2018). Spontani kapitalistični red je na začetku 21. stoletja nadomestil ekonomski totalitarizem finančnega sistema. Obdobje liberalizma je obsegalo tri desetletja, od konca sedemdesetih let 20. stoletja do svetovne finančne krize leta 2007 (Roberts, 2010). Med letoma 1985 in 1995 se je zgodil premik iz množične proizvodnje v množično kostu-

mizacijo, keynesianski model in protekcionizem pa je zamenjal hayekianski in neoliberalni pristop h gospodarstvu, globalizaciji in obsesivni konkurenčnosti (Woodley, 2015). Turizem se je med letoma 1975 in 2005 zaradi svoje intenzifikacije in neenakomerne rasti močno spremenil (Soja, 2005). Temeljlil je na novi ekonomiji prožnega kapitalizma ter razvoju informacij in telekomunikacij, ki so omogočile zgostitev časa in prostora (ang. *time-space compression*) v novi eri globalizacije (Harvey, 1990). Z zasičenostjo tradicionalnega fordističnega trga sonca in plaž se je pojavila nova vrsta turistov, ki jih je čedalje težje kategorizirati. Iščejo alternativno ponudbo, ki vključuje prostčasne proizvode in jim daje drugačno motivacijo za potovanje v smislu življenjske izkušnje (Bonet, 2003; Ashworth, 2005).

3.2 Arhitektura spektakla

Cilj fordističnega konstrukta turizma je množična proizvodnja in izkoriščanje turističnega prostora, pri čemer arhitekti snujejo standardizirane oblike nastanitve, ki nimajo nič skupnega z ustvarjanjem izkušnje (Lefebvre, 1974). Tako ustvarjajo turistične megalopolise, namenjene potrošnji, v katerih so nakopičeni med seboj nepovezani arhitekturni in urbanistični objekti (Gausa, 1996). V nasprotju z navedenim predfordistični in nekateri postfordistični konstrukti turizma temeljijo na simbolični arhitekturi, ki prispeva k oblikovanju elitističnega prostora in zakrivanju družbene realnosti (Pié-Ninot in Rosa-Jiménez, 2014), pri čemer se arhitektura na podlagi postmodernih prvin spreminja v dogodek.

Tovrstna arhitektura spektakla je potrošno blago ali arhitekturni razstavni predmet, ki ustvarja lasten arhitekturizem. V literaturi sta razvidna dva trenda. Na eni strani je arhitektura, ki se osredotoča na identiteto kraja (slika 2a) in krepi njegov pomen (Lasansky in McLaren, 2004), tj. neikonične stavbe v ljudskem arhitekturnem slogu, ki omogočajo pristno izkušnjo kraja (Chang, 2010) ter spodbujajo razvoj turizma in kraja (Palupi idr., 2021). Na drugi strani pa je hiperikonična arhitektura kot plod diznifikacije, za katero so značilna tematska letovišča (slika 2b), ki so turistične prestolnice spremenila v turistično utopijo: enklave v državi, ki so še en primer postindustrijske reteritorializacije urbanih oblik, ki jih ustvarja mednarodni kapital, da bi pritegnil delavce in tuje turiste (Simpson, 2016: 28). Tovrstni kraji se že navezujejo na ekonomsko logiko intenzifikacije, ki sloni na špekulativnem kroženju kapitala in ne vključuje proizvodnje blaga za široko potrošnjo (Nealon, 2002).

Harvey (2005) kritično navaja, da je že od sedemdesetih let 20. stoletja namen neoliberalističnih strategij povrniti elitam moč nad delavskim razredom, kar ustvarja hkrati bogastvo



Slika 2: a) Hotel Cheong Fatt Tze Mansion (Malezija) je primer neikonične stavbe, zgrajene v ljudskem arhitekturnem slogu; b) hotel Luxor v Las Vegasu je primer hiperikonične arhitekture (foto: Alberto E. García-Moreno)

in revščino. Povezane so s pojmom bleščavih mest (Simpson, 2013) kot primerom povezave med steklenimi stavbami, razvojem urbanih enklav in finančnim kapitalom. To so mesta, ki jih sestavlja ikonična arhitektura. Sklair (2006) opredeli ikonično arhitekturo kot slavno arhitekturo, ki ima poseben simbolni in estetski pomen. Na razvoj ikonične arhitekture v šestdesetih letih 20. stoletja je kot prevladujoča sila vplival nadnacionalni neoliberalni kapitalistični razred (ne država ali vera) (Sklair, 2010). Tako so najemali zvezdniške arhitekte z mednarodno priznanimi podjetji, ki so bili jamstvo za to, da bodo naložbe dosegle visoko vrednost (Larson, 1995). Povezava med ikonično arhitekturo in arhitekti na eni strani ter globalizacijo na drugi je posledica uporabe informacij, komunikacijskih tehnologij in računalništva, ki so arhitektom omogočili snovanje stavb nepredstavljenih oblik (Sklair, 2010).

Preglednica 2: Povzetek glavnih značilnosti posamezne vrste turističnega konstrukta

| Tip | Obdobje | Lokacija | Urbana gostota | Ikoničnost | Vzorec | Morfologija |
|-----|--------------|----------------------------------|------------------|--------------------------------|--------------|--------------|
| 1 | Predfordizem | Moneghetti | Visoka | Visoka (eklekticism) | Mestno tkivo | Urbana |
| 2 | Fordizem | Playa de Levante La Carihuela | Srednja | Nizka (racionalizem) | Mestno tkivo | Ekspanzijska |
| 3 | Postfordizem | Playa de San Juan | Nizka do srednja | Nizka (ljudskost) | Mestno tkivo | Predmestna |
| 4 | | Palm Jumeirah | | Visoka (arhitektura spektakla) | Tkivo ikone | Megaobjekt |

4 Od urbane morfologije k ikoničnim megaobjektom

Na podlagi primerjave družbenoekonomskih vidikov, opisanih v tretjem poglavju, in fizičnih vidikov (morfologije in prostorske metrike) so avtorji konstrukte turizma razdelili v štiri tipe, ki so povezani s štirimi morfološki tipi urbanih vzorcev (tj. urbanim, razširitvenim in predmestnim vzorcem ter vzorcem megaobjektov) (preglednica 2 in slika 3). Nanašajo se na razne značilnosti, kot so urbana gostota, ikoničnost in vrsta urbanega vzorca, pri katerih je razviden prehod od urbanistične logike k oblikovanju turističnega megaobjekta.

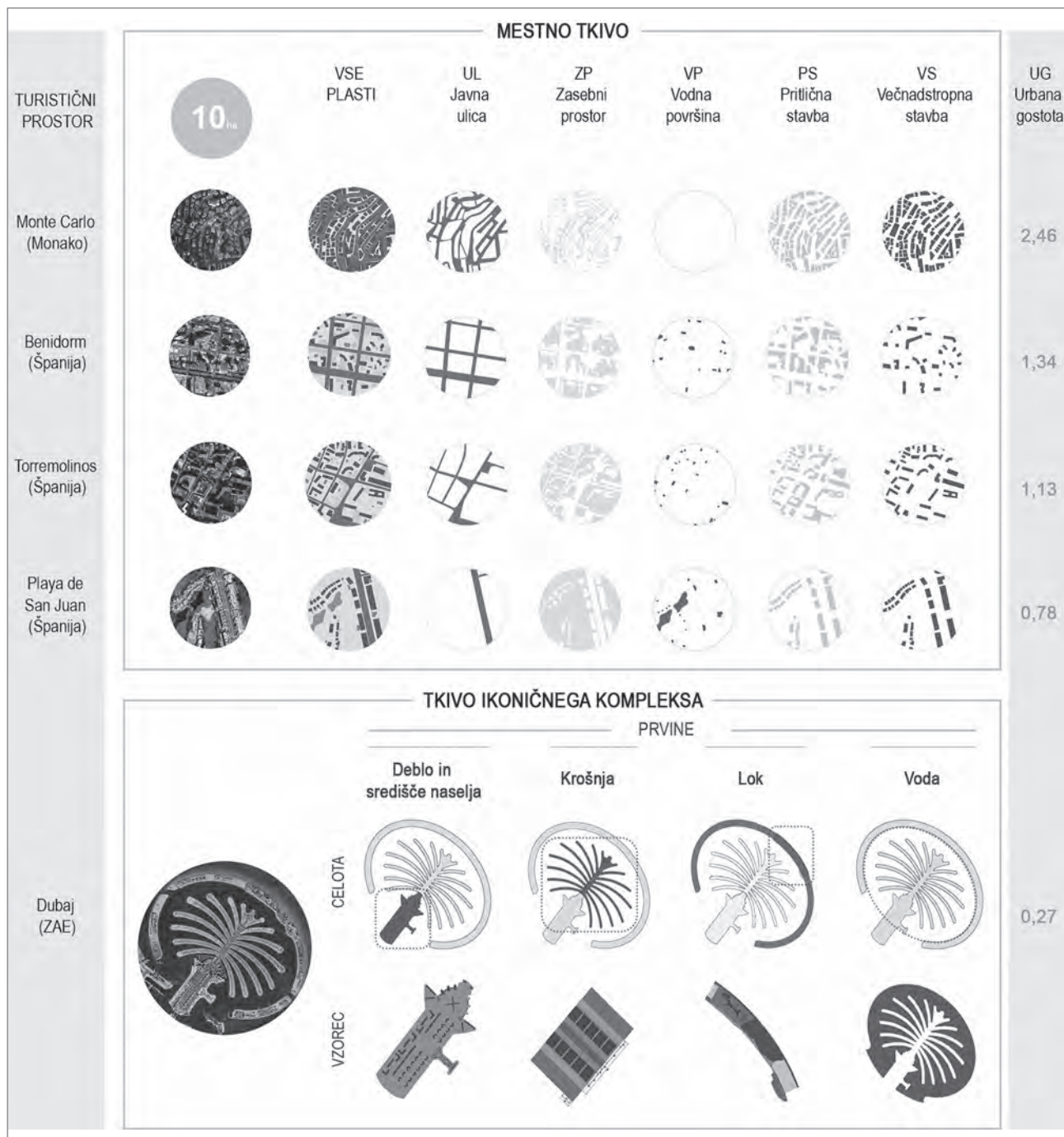
4.1 Tipi konstruktov turizma

1. tip: industrijski kapitalizem in eklektični konstrukt. Gospodarska dejavnost, ki temelji na igralništvu, je na revno in skalnato območje v Monaku pritegovala turiste z visoko kupno močjo (Gay, 1998). Njena glavna posledica je bila družbeno-prostorska segregacija, ki je povzročila družbeno izključitev dejavnosti in ljudi, ki niso mogli vzdrževati visokega družbenega statusa (Pié-Ninot in Rosa-Jiménez, 2014). V Monaku so uporabili formulo turistične kolonizacije, značilne za mestni industrijski kapitalizem, ki jo je v svojih kolonijah uporabljal tudi britanski imperij: potovalne agencije ali konzorciji z lastniškimi deleži v prevoznih sistemih, so gradili razkošne hotele, ki so jih v eklektičnem neoklasicističnem slogu zasnovali evropski arhitekti (Wharton, 1999). Po izgradnji železnice leta 1863 in odprtju Grand Hotela de Paris leta 1864 je Monako dobil elitno podobo, tudi zaradi objektov, kot je Monte Carlo Casino, v katerem je operna hiša, ki jo je zasnoval eklektični arhitekt Charles Garnier. Zaradi prostorskih omejitev se je Monako iz območja s stanovanjskimi vilami spremenil v sodoben mestni prostor goste zazidave. Ulice so prilagojene strmemu reliefu in zasedajo velik delež ozemlja, posamezne parcele pa imajo zelo malo nezasedenega prostora in nimajo bazenov.

2. tip: fordistični kapitalizem in mednarodni arhitekturni konstrukt. Navedeni model turizma je omogočil hitro preobrazbo obale, hkrati pa sta množična rast in gospodarska vizija močno vplivali na krajinske vrednote, ki paradoksalno najbolj privabljajo turiste (Pié-Ninot in Rosa-Jiménez, 2014). Za proučevani območji v Benidormu in Torremolinosu je značilen enak morfološki vzorec hotelov in stanovanjskih kompleksov z zasebnimi prostimi prostori za prostočasne aktivnosti. Zaradi manjših in ožjih cest so stavbni bloki lahko večji, poleg tega lahko vključujejo bazene, ki postajajo čedalje večji. Glavni težavi opisanih fordističnih urbanih tkiv sta zastarelost prostorov, zgrajenih med gospodarskim razcvetom v šestdesetih letih 20. stoletja, in izginjanje preprostega kulturnega proizvoda, ki ne more več zadostiti potrebam sodobnega turista (Ashworth, 2005).

3. tip: postfordistični prehod in ljudski konstrukt. Središče postfordističnega turističnega prostora je letališče, ki je zaradi čedalje večje uporabe letal kot prevoznega sredstva (zlasti poceni letov) postalo vozlišče in mesto v malem (Soja, 2005). Zaradi navedenega se čedalje bolj briše meja med mestom in predmestjem, pri čemer narašča suburbanizacija, za katero je značilna predvsem gradnja počitniških hišic. Turistični konstrukt Playa de San Juan v španskem Alicanteju temelji na velikih parcelah in zasebnih odprtih površinah z igriščem za golf. Več je tudi vodnih površin, zlasti zaradi umetnih jezer in bazenov v stanovanjskih kompleksih redke zazidave, ki lahko vključujejo celo daljši pas umetne plaže (Rosa-Jiménez idr., 2016). Nižja urbana gostota stanovanjskih turističnih kompleksov je skupaj z obuditvijo lokalnega arhitekturnega sloga povzročila trivializacijo kulturnih slogov in podob.

4. tip: postfordistični kapitalizem in ikonični megaobjekt. Turistični model Dubaja je podoben drugim modelom v vzhodni Aziji (na Kitajskem, v Južni Koreji ali na Tajvanu) (Jeon, 1995). Urbanistični razvoj Dubaja je primer neoliberalne gospodarske politike, katere cilj je pritegniti najpremožnejše turiste in najpomembnejše tuje naložbe ter izključiti priseljenke in domačine. Dubaj temelji na moči arhitekture spektakla



Slika 3: Urbana gostota in morfološke značilnosti proučevanih območij (ilustracija: avtorji)

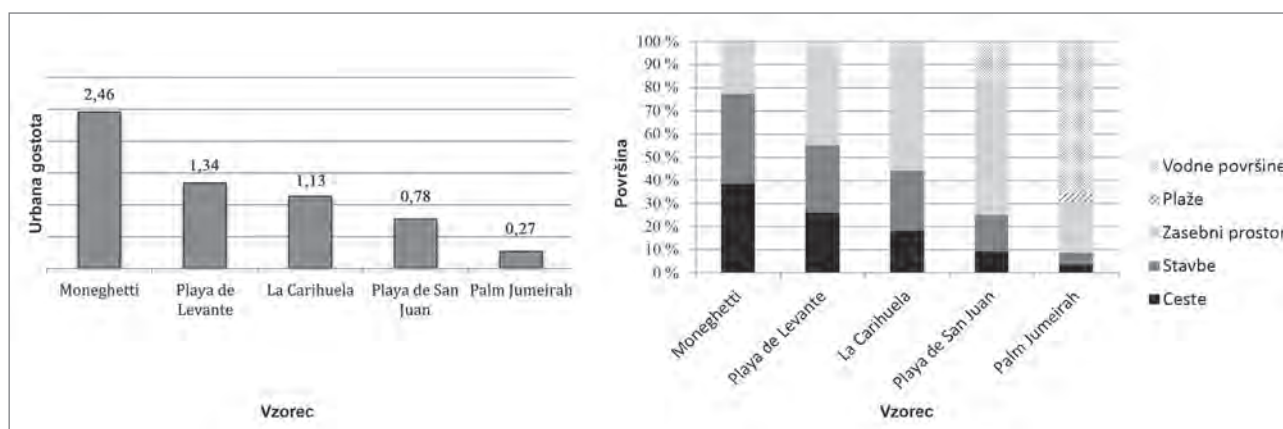
(Elsheshtawy, 2010), ki vključuje nebotičnike, nakupovalna središča in objekte visoke gradnje, ki se ne skladajo z okolico. Mesto poleg tega izkorišča in marginalizira priseljene gradbene delavce (Ghaemi, 2006) in prekarne delavce (Gibson, 2009). V okviru megapreobrazbe obalnega dela mesta naj bi dolžino obale podaljšali s 45 na več kot 1.500 km. Projekt vključuje gradnjo umetnih otokov Palm Deira, Palm Jebel Ali, The World Islands, The Universe in Waterfront City, zadnjega naj bi zasnovalo arhitekturno podjetje OMA, na njem pa naj bi stanovalo do 1,5 milijona ljudi (Velegrinis in Katodrytis,

2015). Palm Jumeirah (zgrajen leta 2008) je najmanjši od treh umetnih otokov v obliki palme, na katerem so več kot 25 mednarodnih hotelov (npr. Atlantis Dubai Hotel s 1.500 sobami), akvarij in tematski park. Ikonična zasnova v obliki palme vključuje deblo, ki je središče kompleksa, sestavljeno iz apartmajev, hotelov in turističnih atrakcij, na območju 17 vej, ki štrlijo iz debla, pa so stanovanjske vile in hiše z zasebnimi plažami. Vse skupaj obdaja umetni otok s turističnimi objekti, ki ima obliko polkroga.

Preglednica 3: Urbanistični parametri posameznega konstrukta turizma

| Vzorec | T | A (v m ²) | B (v m ²) | B | | | | Največja višina (v fazah) | Zazidana površina (v m ²) | Gostota/ enoto |
|-------------------|---|--------------------------|--------------------------|------------------------|------------------------|------------------------|------------------------|---------------------------------|---|-------------------|
| | | | | B1 (v m ²) | B2 (v m ²) | B3 (v m ²) | B4 (v m ²) | | | |
| Moneghetti | 1 | 38.695 | 61.305 | 38.690 | 22.615 | 0 | 0 | 14 | 245.730 | 2,46 |
| Playa de Levante | 2 | 26.186 | 73.814 | 29.045 | 41.844 | 2.925 | 0 | 29 | 134.252 | 1,34 |
| La Carihuela | 2 | 18.203 | 81.797 | 26.069 | 43.670 | 2.058 | 0 | 13 | 113.152 | 1,13 |
| Playa de San Juan | 3 | 9.258 | 90.742 | 15.967 | 58.498 | 16.277 | 0 | 6 | 77.637 | 0,78 |
| Palm Jumeirah | 4 | 3.718 | 96.282 | 5.128 | 21.894 | 65.441 | 3.819 | 21 | 27.027 | 0,27 |

Opomba: T = tip, A = površina cest, B = površina zasebne parcele, B1 = bruto tlorisna površina pritličja, B2 = površina zasebnega prostora, B3 = površina zasebnih vodnih površin, B4 = površina zasebne plaže.

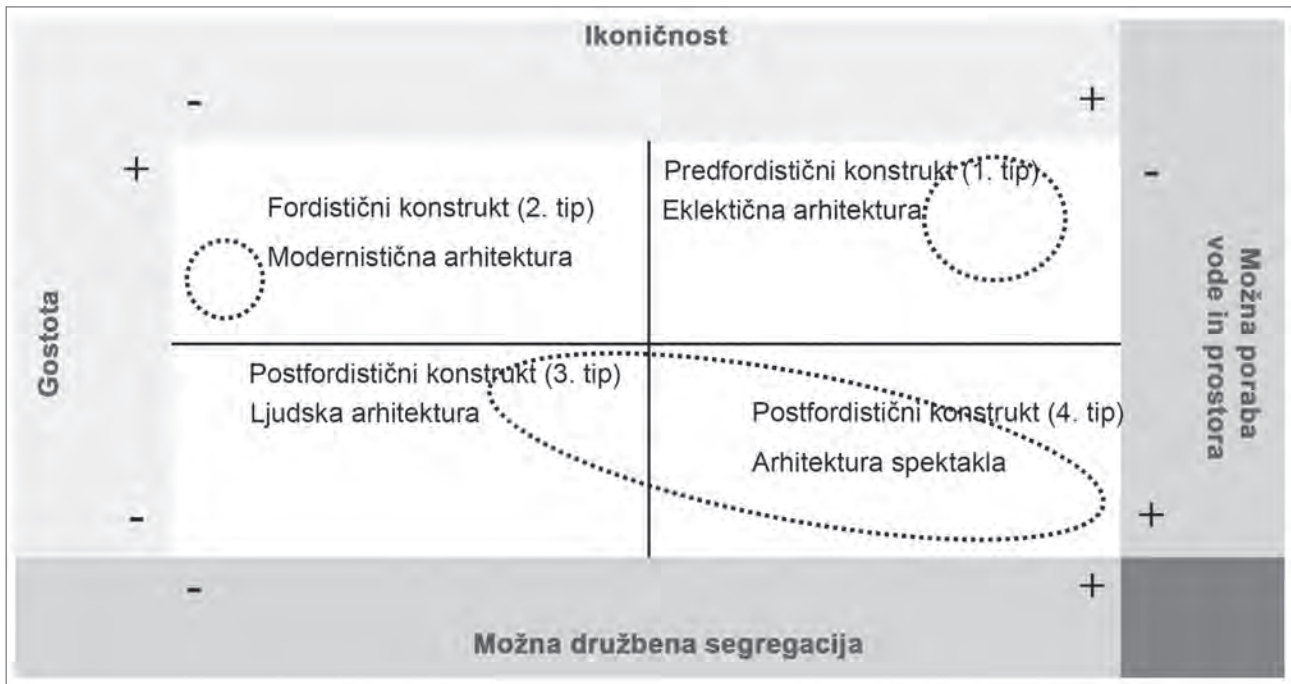
**Slika 4:** Urbana gostota (levo) in deleži rabe zemljišč (desno) za vsak konstrukt turizma (ilustracija: avtorji)

4.2 Urbana gostota in fizično izkoriščanje prostora

Iz preglednice 3 je razvidno, da z razvojem konstruktov turizma gostota zazidave mestnega tkiva pada, in sicer od strnjenege mesta v Monaku ($U_g > 2$) do nizke gostote zazidave stanovanjskih kompleksov z igrišči za golf. Povprečna gostota fordističnega mestnega tkiva, ki je blizu 1 (2. tip konstrukta), omogoča ureditev kompleksnega programa prostih površin in bazenov. Nižja gostota pri 3. tipu (povprečna gostota okrog 0,5) in 4. tipu (nizka gostota v vrednosti 0,25) konstrukta turizma vodi v postopno zmanjševanje cestnih površin in površin, ki jih zasedajo stavbe, v korist večjih zasebnih prostih površin, vodnih površin in zasebnih plaž; navedeno je razvidno zlasti v primeru otoka Palm Jumeirah (preglednica 3 in slika 4). Gradnja umetnega otoka Palm Jumeirah je bil zahteven gradbeni projekt in je vplival na ekosistem Perzijskega zaliva (Sale idr., 2011). Porast zasebnih odprtih površin pri postfordističnem konstrukturu spremlja družbena segregacija, ki je posledica privatizacije zemljišč (varovana naselja), porast zelenih površin in bazenov pa je povezana z višjimi okoljskimi stroški, ki so posledica večje porabe vode (Gössling idr., 2012; Hof in Blázquez-Salom, 2015).

4.3 Ikoničnost kot družbeno izkoriščanje prostora

Kot navaja Sklair (2010), je razvoj ikoničnosti v arhitekturi spodbudil segregacijo in družbeno izkoriščanje prostora. Na začetni stopnji so bila v okviru fordističnega konstrukta (2. tip), namenjenega ljudem srednjega in nizkega srednjega razreda, uporabljena načela modernistične arhitekture. Poudarek je bil na soncu in plaži kot glavni turistični izkušnji, pri čemer je imela arhitektura manjšo ikonično vrednost in se je uporabljala kot podporna infrastruktura nastanitvenim objektom. Na drugi stopnji (arhitektura konstrukta 3. tipa) je arhitektura zlasti po sedemdesetih letih 20. stoletja vključevala ljudski slog, s katerim so arhitekti eksperimentirali (Chang, 2010) na elitnih destinacijah, ki jih je družbena smetana že uporabljala (npr. v španski Marbelli ali marini Port Grimaud v Franciji). Na tretji stopnji pa je za konstrukta 1. in 4. tipa, povezana z ikonografijo in arhitekturnim slogom, značilna mednarodna arhitektura, namenjena kapitalistični eliti, ki spodbuja prostorsko segregacijo in ekskluzivnost moči v svojih vrstah. Dubaj je tako preurejeno mesto, ki radikalizira mestno in arhitekturno ikonografijo, namenjeno pretoku kapitala in pretočnosti bleščavih mest (Simpson, 2016), Monako pa



Slika 5: Povezava med proučevanimi konstrukti turizma ter njihovimi morebitnimi družbenimi in okoljskimi posledicami (ilustracija: avtorji)

ima v smislu urbane gostote trdno naravo in arhitekturo, ki spodbuja družabnost.

4.4 Urbani vzorci in nova tkiva ikon

Arhitekturna ikonografija se je preselila tudi na področje mestnega tkiva ali tkiva ikon oziroma ikoničnih kompleksov. Izjemen primer navedenega je umetni otok Palm Jumeirah. Tkivo ikone se nanaša na urbano zasnovo kot ikonografski objekt, pri kateri nastane razkol med arhitekturo in urbanističnim razvojem, značilen za pojem megaobjekta. Za konstrukte 1., 2. in 3. tipa je značilno tradicionalno odprto mestno tkivo, ki se lahko širi na območju, ne da bi spremenilo svoje značilnosti, tkivo ikone pri konstruktu 4. tipa pa je zaprto in se lahko širi samo na podlagi sprememb v obliki in/ali velikosti. Sklada se z idejo turističnega mehurčka, ki jo je razvila Susan Fainstein (2005).

5 Razprava

Na sliki 4 so predstavljeni izsledki primerjave arhitekture, morfologije in prostorske metrike štirih primerov kapitalističnih konstruktov obalnega turizma ter analize njihovih družbenih in okoljskih posledic (družbene segregacije ter gostote in deležev vodnih in prostih površin). Raziskava je jasno pokazala, da se lahko kapitalistični turizem prilagodi vsem vrstam mestnega tkiva, z gradnjo turističnih megaobjektov pa lahko celo prese-

že tradicionalne urbanistične modele. Vsak konstrukt turizma ima zelo različne družbene in okoljske posledice.

Postfordistični turistični konstrukt umetnega otoka Palm Jumeirah je najboljši primer mestne arhitekturne ikonografije ter družbenega in fizičnega izkoriščanja prostora. Megaobjekt predstavlja nov standard in bi ga bilo treba vključiti med štiri prostorske vzorce rasti mest, ki so jih opredelili Reis idr. (2016): širjenje, suburbanizacija, policentrizem in zgoščevanje/zlitje. Postfordistični model turističnih megaobjektov v Dubaju je torej prelomna točka, saj se ustvarjajo ikonografski vzorci, ki se ne skladajo z urbani vzorci, poleg tega imajo tamkajšnji projekti ogromne družbene in okoljske posledice. Model otoka Palm Jumeirah so posnemali v drugih državah na globalnem jugu, npr. v projektih Melaka Gateway v Maleziji (predmet javnih protestov) (Arnez, 2022) ali Peal Island v Katarju, zaradi česar so bila navedene lokacije v literaturi opisane kot plenilske, tj. sebične in megalomanske utopije, ki omogočajo izkoriščanje arhitekturnih modelov in delovne sile (Rizzo, 2019). Navedeno plenilsko logiko podpirajo tudi naftni tajkuni na sredozemski obali, zlasti pri novi ureditvi ali širitvi marin ali gradnji novih hotelov, podobnih hotelu Burdž Al Arab v Dubaju, na Costi del Sol (Navarro-Jurado idr., 2019).

Z višjo gostoto stavb za enako število turistov naj bi se zmanjšali zasedenost in izkoriščenost prostora, zlasti če je tudi razporeditev zelenih in vodnih površin v njem v ravnovesju. Kot navajajo Gaffron idr. (2005), imajo trajnostna mesta stavbe srednje vi-

šine, s srednjo gostoto pozidave (med 0,8 in 3,0). Konstrukti 1. in 2. tipa se ujemajo z navedeno gostoto, še zlasti konstrukti 2. tipa, katerih povprečna gostota omogoča ureditev optimalnega mestnega tkiva z dovolj zasebnimi prostimi površinami (tako vodnimi kot zelenimi). Nizka urbana gostota, značilna za konstrukte 3. tipa, zlasti za igrišča za golf, poveča porabo vode, privatizacijo prostora in tveganja za prihodnjo celovitost lokalnih družbeno-ekoloških ekosistemov (Briassoulis, 2007), hkrati pa se zdi, da so tovrstni konstrukti bolj usmerjeni k nepremičninskemu proizvodom kot pa aktivnim in dinamičnim turističnim destinacijam (Del Campo Gomis idr., 2006).

Konstrukti, za katere je značilna visoka urbana gostota, lahko preprečujejo družbeno segregacijo. Gostota je poleg tega pokazatelj kakovosti mesta ali možnosti njegove preobrazbe, kar je razvidno v Monaku, kjer je preobrazba iz modela zdraviliškega mesta (podobno kot pri konstruktu 3. tipa) v model visoke urbane gostote omogočila trajnostni razvoj, ki temelji na sodelovanju javnosti. Kot ugotavlja D’Hauteserre (2005: 308), prakse Monaka kažejo njegovo pragmatično prilagoditev na globalne okoljske, gospodarske in kulturne sisteme ter realistično uporabo trajnostnih načel. Če je le mogoče, uprava Monaka uporablja načela trajnostnega razvoja, osredotočenega na človeka. Primer Monaka kaže, da je visoka urbana gostota tudi simbol visoke kupne moči. V nasprotju z opisanim lahko model Dubaja in zlasti njegovih umetnih otokov omogoči socialno kohezijo samo z osredotočanjem na dele mesta, ki imajo živahen utrip in ne spadajo v okvir arhitekture spektakla (Elsheshtawy, 2010).

Predfordistični konstrukt turizma z urbano gostoto, večjo od 1 (konstrukt 1. tipa), in fordistični konstrukt turizma z urbano gostoto enako 1 (konstrukt 2. tipa) sta z vidika morfologije in prostorskih vzorcev primerna rešitev za množični turizem. Pri obeh ima arhitektura zaradi ikonične sposobnosti stavbe kot prvine, ki ustvarja turizem, ključno vlogo pri oblikovanju turističnega dogodka (Scerri idr., 2019). Pri prvem je zaradi majhne količine zelenih in vodnih površin potrebna ikonična arhitektura, v ta namen je bila v številnih starih mestnih jedrih kulturna dediščina obnovljena (Richards, 2011) in spremenjena v kulturne ikone. Pri drugem konstruktu pa velika sposobnost preoblikovanja, značilna za fordistični turistični megalopolis (Gausa, 1996), omogoča prenavo na podlagi ikonografskih urbanističnih projektov, kot na primer v Benidormu, kjer so urbanistični projekti ustvarili privlačno in učinkovito turistično mesto (Nolasco-Cirugeda idr., 2020).

6 Sklep

Čeprav Charley (2010) navaja, da kapitalistični gospodarski razvoj ni trajnosten, je primerjalna raziskava kapitalističnih konstruktov po obdobjih pokazala, da je treba pri načrtovanju upoštevati gostoto zazidave, uravnoteženo razporeditev vodnih in zelenih površin in uravnoteženo razvrstitev ikonične arhitekture. Izogibati pa se je treba preobrazbam nabrežij z ikonično morfološko ureditvijo.

Poleg predfordističnih konstruktov je tudi fordistični konstrukt z urbano gostoto blizu 1 uravnotežen model, primeren za množični turizem, saj omogoča dovolj zelenih površin in bazenov, ki so ustrezno razporejeni. Fordistični konstrukti so bili oblikovani na podlagi načel standardizacije in ekonomije, pri čemer so bili obravnavani bolj v smislu nastanitvene infrastrukture kot pa ikonografske vrednosti arhitekture ali oblikovanja krajine. Njihova glavna slabost je slaba kakovost krajine, saj so bili objekti, zasnovani v skladu z njimi, družbeni proizvodi, dostopni večini prebivalstva, ki so povzročali tudi manj družbene segregacije. Potrebna preobrazba destinacije bi morala potekati nekje vmes med dvema trendoma revitalizacije: po eni strani bi jo lahko razvili v skladu s postfordističnimi konstrukti turizma, pri čemer so glavni pomislek okoljski in družbeni vplivi, po drugi strani pa bi z okrepitevijo arhitekture spektakla lahko oblikovali živahno in vitalno destinacijo.

Raziskava ima nekatere omejitve, zlasti z vidika reprezentativnosti izbranih primerov. Proučevani modeli so samo vzorec širšega spektra urbanih morfologij in arhitekture. Čeprav so reprezentativni primeri posameznih faz v razvoju kapitalizma, izsledkov raziskave ne moremo posplošiti na druga geografska območja. Nadaljnje raziskave bi se morale osredotočiti na primerjalne študije posameznih obdobij kapitalizma, ki bi vključevale več proučevanih primerov. S tega vidika bi bilo zanimivo analizirati tudi konstrukte turizma v obmorskih letoviščih po svetu in proučiti posledice, ki so jih utrpela pri razvoju.

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Zahvala

V članku je predstavljen del izsledkov raziskovalnega projekta z naslovom Stanovanja in stanovanjski turizem: procesi in konflikti (št. projekta: CSO2013-48155-P), ki ga je financiralo špansko ministrstvo za gospodarstvo, industrijo in konkurenčnost. Avtorji se zahvaljujejo anonimnim recenzentom, katerih koristne opombe so pomembno prispevale h končni različici članka.

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UDK: 72:7.035.93(477Poltava)
doi:10.5379/urbani-izziv-2023-34-01-03

Prejeto: 1. 3. 2023
Sprejeto: 26. 4. 2023

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Izvirnost ukrajinske narodne arhitekture v Poltavi na začetku 20. stoletja

Avtorici v članku proučujeta ukrajinski art nouveau v okviru njegovega vseevropskega razvoja v arhitekturi poznega 19. in zgodnjega 20. stoletja. Z navedenim slogom so posamezni narodi izražali identiteto. Avtorici sta postavili hipotezo, da razvoj tega sloga v arhitekturi Poltave na začetku 20. stoletja izraža identiteto mesta in narodno identiteto prebivalcev ter ponazarja način izražanja narodne zavesti z arhitekturo. Opredelili sta in ponazorili posebnosti tega sloga kot izraza narodnih prvin v arhitekturi Poltave na začetku 20. stoletja. Njuna raziskava

je temeljila na metodah kulturološkega pristopa v okviru splošnega kulturnega razvoja mesta. Avtorici sta predstavili tudi splošne značilnosti razvoja arhitekturnega sloga v Poltavi na začetku 20. stoletja in položaj ukrajinskega art nouveauja v polistilizmu proučevanega obdobja. Na koncu sta analizirali vpliv ukrajinskega art nouveauja zgodnjega 20. stoletja na nadaljnji razvoj arhitekture v Poltavi.

Ključne besede: ukrajinski art nouveau, identiteta kraja, polistilizem, narodna tradicija, ljudska arhitektura

1 Uvod

Art nouveau poznega 19. in zgodnjega 20. stoletja je imel v vsaki državi, kjer se je razvil, specifične značilnosti, povsod pa je izražal narodne arhitekturne prvine. Te so bile vidne v tradicionalnih oblikah, materialih, kompoziciji in okraskih, značilnih za ljudsko arhitekturo. Po ideološki vsebini je art nouveau nasprotoval simbolnim in racionalističnim smerem v arhitekturi poznega 19. in zgodnjega 20. stoletja, katerih cilj je bil ustvariti globalni slog. Želja po izražanju lastne identitete je bila v različnih evropskih državah posledica različnih družbeno-političnih dejavnikov. V severni Nemčiji se je z art nouveaujem izražala želja po narodni združitvi, na Švedskem in Norveškem se je v tem slogu utrjevala narodna tradicija, na Finskem in v baltičkih državah pa so s tem slogom poudarjali izvirnost in željo po neodvisnosti od ruskega carstva (Antošček, 2018).

Pri razvoju ukrajinskega art nouveauja se je narodna zavest izražala z obujanjem ljudskih prvin v ukrajinski arhitekturi. Podobni procesi so na začetku 20. stoletja potekali tudi pri drugih narodih (npr. v baltičkih državah, Kataloniji, na Poljskem, Finskem, v Sloveniji in Srbiji). Iskanje narodne identitete je v arhitekturi in umetnosti teh držav potekalo v kontekstu iskanja svobode (Ovsec, 2006). Najpomembnejši dejavnik, ki je vplival na kulturni razvoj omenjenih držav, je bil boj za politično in kulturno neodvisnost od Avstro-Ogrske oziroma Rusije. Glavna središča so bili Budimpešta, Praga, Varšava in Krakov. Ideje zahodne nacionalne romantike so bile v Ukrajino prenesene z aktivnostmi poljskih in nemških kulturnih središč. Ukrajinski romantiki so krepili zavest Ukrajincev kot naroda z lastno zgodovino, jezikom, estetskimi in etičnimi načeli, kulturo in zgodovinskim ciljem.

V Ukrajini se za art nouveau najpogosteje uporablja izraz ukrajinski arhitekturni modernizem (Čepelik, 2000), ki izraža njegov vzporedni kronološki razvoj s slogom, drugje v Evropi poimenovanim kot secesija, liberty ali jugendstil. Ima namreč podobno kompozicijo in umetniške značilnosti kot navedene evropske različice art nouveauja. Te značilnosti vključujejo enotnost zunanjega in notranjega prostora, celosten pristop k obravnavi delov in celote, prosto načrtovanje in možnost preoblikovanja prostorov (metoda, ki se je običajno uporabljala pri šolah pod upravo zemstev), združevanje umetniških tehnik v notranjosti in na pročeljih zgradb, okrasje v obliki majolične keramike, poslikav, grbov na pročeljih ter lesenih in kamnitih rezbarij. Ukrajinski art nouveau je poleg tega povezan z evropskimi neoromantičnimi smermi, ki so temeljile na ideologiji gibanja arts and crafts Williama Morrisa. Povezava je razvidna iz uporabe prvin ljudske arhitekture in obrtniških izdelkov v okrasju stavb. Ideološko podlago narodnega prebujenja in

identitete, izraženo v slogu, lahko pripišemo art nouveauju. Ukrajinski art nouveau je izvorno tesno povezan z miselnostjo prebivalcev. Na začetku 20. stoletja so ga z ustvarjalnostjo namensko oblikovali ukrajinski izobraženci, katerih glavni cilj je bil izraziti identiteto in ljudsko izročilo ukrajinskega naroda v arhitekturi.

Na začetku 20. stoletja so se ideje art nouveauja razširile na številna področja ukrajinske umetnosti, kar se je po ukrajinskih regijah zgodilo skoraj sočasno. Umetniška izvirnost in posebnosti delov Ukrajine so se kazale v aktivnostih regionalnih središč tega sloga. Ta središča so bila Poltava (od leta 1903), Lvov (ode leta 1904), Harkov (od leta 1909), Kijev (od leta 1907) in Sankt Peterburg (od leta 1912) (Čepelik, 2000). Vsako je uporabljalo drugačne arhitekturne in kompozicijske rešitve ter umetniške in okrasne tehnike.

Narodni slog ima v arhitekturi sodobnega mesta pomembno mesto. Ukrajinski art nouveau skupaj z drugimi slogi ohranja lokalno izvirnost ter značilne estetske in morfološke prvine, ki preprečujejo izgubo identitete kraja (Apostolova-Sossa in Mamedov, 2017). Trenutne politične razmere v Ukrajini so okrepile narodno zavest ljudi in narod še bolj povezale. Mnogi predstavniki raznih področij ukrajinske kulture svetu predstavljajo ukrajinsko umetnost ter njeni izvirnost in edinstvenost. Poudarjanje narodne identitete je namreč ob trenutnih pritiskih in nevarnosti, da država izgubi svojo neodvisnost, nujno in ključno.

2 Metode in faze raziskave

Avtorici sta v članku opredelili posebnosti nastanka in razvoja ukrajinskega art nouveauja v okviru splošnega slogovnega razvoja arhitekture v Poltavi v 20. stoletju kot načina izražanja identitete kraja in naroda. Glavni predmet raziskave so zato stavbe s slogovnimi posebnostmi lokalne arhitekture ter značilnosti razvoja tega sloga in njegov družbeni pomen. Raziskava je temeljila na kulturološkem pristopu. Posebne metode arhitekturne raziskave so vključevale primerjalne, morfološke, kompozicijske in grafične analize. Avtorici sta uporabili še splošne znanstvene metode (empirične, splošne logične in teoretične), pri čemer sta empirične metode uporabili za merjenje in fotografiranje arhitekturnih objektov.

Z vidika kulturološkega pristopa je ukrajinski art nouveau izraz kulturološke ideologije in miselnosti prebivalcev. Temelji na družbenih in političnih dejavnikih. Avtorici sta zato posebno pozornost namenili temeljnemu pogojem in dejavnikom oblikovanja sloga. Raziskavo sta osnovali na trditvi, da je arhitektura sinteza nesnovne, umetniške in snovne kulture posameznega zgodovinskega obdobja, kot jo je predstavil Kagan (1996).

Ukrajinski art nouveau je bil ena od smeri v razvoju poltavske arhitekture v zgodnjem 20. stoletju v splošnem okviru takratnega polistilizma. Avtorici sta postavili hipotezo, da razvoj ukrajinskega art nouveauja v arhitekturi Poltave na začetku 20. stoletja izraža identiteto mesta in narodno identiteto prebivalcev ter ponazarja izražanje narodne zavesti z arhitekturo.

Avtorici sta narodno izvirnost arhitekture v Poltavi proučevali po korakih. Raziskavo sta morali stalno prilagajati glede na pridobljene rezultate in njihovo ujemanje z zastavljenimi nalogami. Izvedli sta jo v petih korakih v okviru treh raziskovalnih faz: strukturne in napovedne faze, tehnološke faze in faze preverjanja.

Koraki strukturne in napovedne faze so imeli pripravljalo funkcijo. Njihov glavni cilj je bil ugotoviti, katera vprašanja so premalo raziskana, in na tej podlagi določiti predmete raziskave. Poleg tega sta avtorici v tej fazi opredelili cilje raziskave, zbrali in posplošili teoretično in empirično gradivo ter analizirali dosedanje raziskave. V okviru te faze sta torej zbrali začetne podatke za raziskavo.

Tehnološka faza je bila povezana z neposredno izvedbo raziskave in je vsebovala več podfaz. Avtorici sta se najprej posvetili analizi, sintezi in sistematizaciji zbranih podatkov, na podlagi česar sta določili temeljne pogoje in dejavnike oblikovanja art nouveauja v arhitekturi Poltave v smislu njegovega vseevropskega razvoja. Nato sta analizirali lokacijo proučevanih objektov v zgradbi mesta. Objekte sta si ogledali na terenu, ob tem pa izvedli ustrezne meritve ter izdelali skice in risbe objektov. Faza je tvorila materialno podlago raziskave.

Avtorici sta v naslednji fazi podatke sistematizirali in oblikovali hipotezo. Opravili sta morfološko in kompozicijsko analizo posebnosti art nouveauja v arhitekturi mesta, na podlagi katere sta opredelili in razvrstili značilnosti proučevanega arhitekturnega sloga. V tej fazi sta torej določili izvirne narodne značilnosti proučevanih objektov.

V fazi preverjanja sta avtorici potrdili ustreznost opravljenih raziskav in njihovo ujemanje z začetnimi cilji, kar sta storili v dveh korakih. Najprej sta preverili resničnost domnev glede izvirnosti art nouveauja in njegovega družbenega pomena. Dobljeni rezultati so dali teoretično podlago za zaščito in obnovo arhitekturnih objektov, zasnovanih v slogu ukrajinskega art nouveauja.

Preglednica 1: Kratak pregled preteklih raziskav

| Predmet raziskave | Avtorji | Glavne teme | Namen |
|--|---|--|--|
| Art nouveau severne in vzhodne Evrope ter skandinavskih in baltičkih držav | Anteniške (2006), Grosa (2008, 2012), Hroch (2022), Miller Lane (2000), Omilanowska (1993), Ovsec (2006), Plummer (2012), Sokol (2008), Veress (2013) | Dejavniki nastanka, razvoj in glavne značilnosti art nouveauja v proučevanih državah | Primerjava art nouveauja in njegovih glavnih značilnosti med državami. |
| Razvoj ukrajinske arhitekture na začetku 20. stoletja | Asejev idr. (1989, 2003), Večerski (2005), Timofijenko (1989, 2006), Jasijevič (1988) | Razvoj ukrajinskega arhitekturnega sloga na začetku 20. stoletja, dejavniki nastanka in razvoja slogovnih smeri | Opredelitev položaja art nouveauja v splošnem razvoju ukrajinskega arhitekturnega sloga v proučevanem obdobju. |
| Arhitektura Poltave v proučevanem obdobju | Vadimov (1991, 2019), Gladiš in Cirulnik (1995), Kondel-Perminova (2007), Lebedinski (2012), Novoselčuk (2006), Novoselchuk (2022), Osičenko (2006), Tregubov (2012), Ševčenko (2009 in 2010), Skibicka in Šuleško (2016) | Temeljni pogoji in dejavniki nastanka arhitekture v Poltavi na začetku 20. stoletja, značilnosti urbanističnega načrtovanja, tipološki, slogovni in kompozicijski razvoj | Analiza slogovnega in kompozicijskega razvoja, določitev vzorcev pojava in razvoja slogovnih smeri, značilnosti oblikovanja mestnega okolja, opredelitev odvisnosti slogovnih rešitev od funkcije stavb. |
| Ukrajinski art nouveau | Antoščuk (2017, 2018), Božinski (2007), Vitčenko (2018) Vitčenko (2019), Mojsejenko (1995), Ivaško (2013), Dyomin in Ivaško (2020), Čepelik (2000), Šumicki (1914), Jasijevič (1988) | Pojav in razvoj art nouveauja v ukrajinski arhitekturi, njegove glavne značilnosti in regionalne posebnosti | Analiza slogovnih značilnosti ukrajinskega art nouveauja in načinov poudarjanja njegove izvirnosti. |
| Posebnosti art nouveauja v arhitekturi Poltave in primeri objektov | Legenki (2004), Hanko (2002), Čepelik (2000) | Regionalne posebnosti art nouveauja v arhitekturi Poltave | Posplošitev izsledkov prejšnjih raziskav, opredelitev premalo raziskanih vprašanj. |

Vir: Tetjana Savčenko (2023)

skega art nouveauja. S primerjavo rezultatov ter na podlagi postavljenih domnev in hipoteze sta avtorici proučili, kako arhitekturne značilnosti ukrajinskega art nouveauja določajo identiteto kraja. Nazadnje sta analizirali trenutno stanje proučevanih objektov, pri čemer sta ugotavljali njihovo vlogo v sodobnem mestnem okolju in njihov vpliv na nadaljnji razvoj mestne arhitekture. Na koncu sta predstavili še možne smeri uporabe izsledkov raziskave pri oblikovanju regionalnih značilnosti sodobne arhitekture v Poltavi.

3 Pregled literature

Avtorici sta pregledali raziskave in druga dela o arhitekturi Ukrajine in Poltave, ki so jih objavili znanstveniki, zgodovinarji in umetniški kritiki (preglednica 1).

4 Raziskava

4.1 Splošne značilnosti arhitekture v Poltavi na začetku 20. stoletja

Razvoj arhitekture v Poltavi na začetku 20. stoletja je sledil smerem razvoja arhitekturnih slogov drugje po Ukrajini. Ker je bila Ukrajina del Avstro-Ogrske in Rusije, se je tudi njena arhitektura začela zgledovati po arhitekturi zahodnoevropskih mest, in sicer zlasti po secesijskem in eklektičnem arhitekturnem slogu (Ivaško, 2013). Poltava je poleg Dnepra (nekdanjega Katerinoslava), Sumija in Mirgoroda spadala med vzhodna ukrajinska secesijska mesta, pri čemer je bil središče secesijskega

sloga na vzhodu države Harkov. V primerjavi s Harkovom je bila precej manjše mesto, s slabše razvitim gospodarstvom in industrijo, zato so bile slogovne novosti v njem uvedene pozneje in pod močnim vplivom lokalne tradicije.

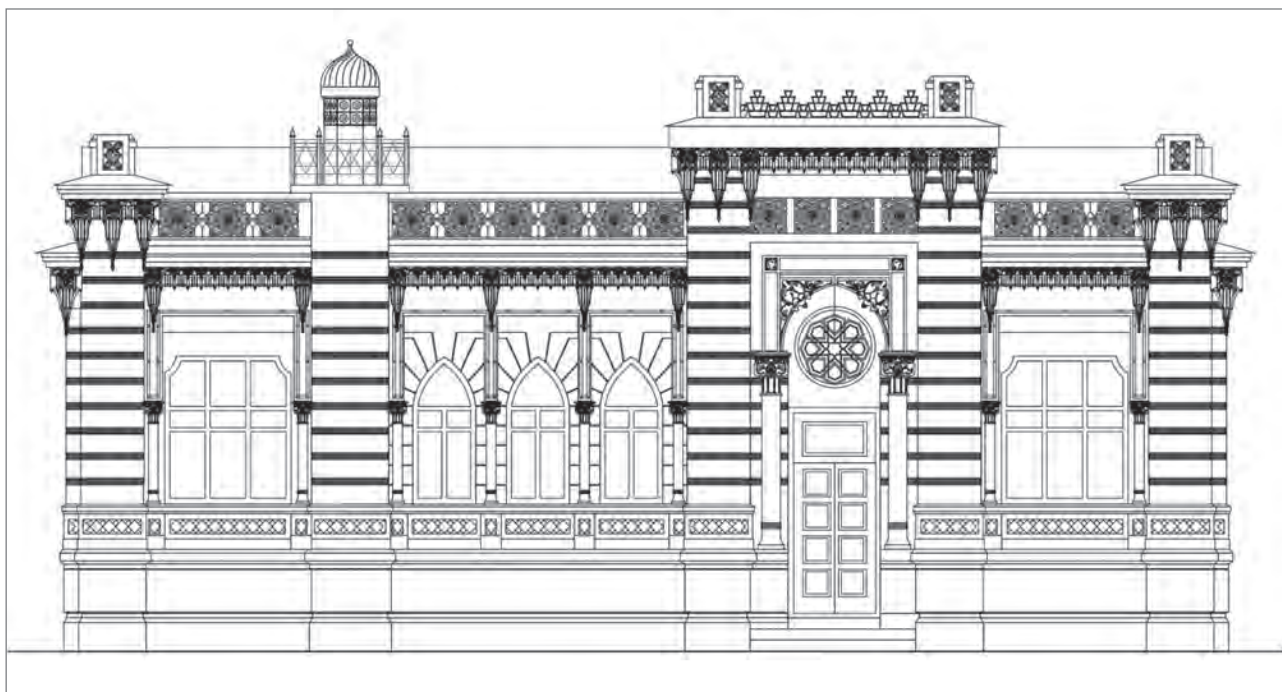
V proučevanem obdobju je v arhitekturi mesta prevladovala uporaba opeke, značilna za takratna ruska podeželska mesta. Na območju Poltave, ki je bogato z glino, so se začele pojavljati opekarnice, ki so izdelovale opeko različnih oblik, s katero so okraševali pročelja zgradb.

Na raznovrsten arhitekturni slog v Poltavi je vplivalo tudi čedalje več podjetnikov v mestu, ki so zahtevali nov (secesijski) slog. Arhitekti so se zgledovali po sočasnih evropskih različicah sloga, ki so ga na Dunaju imenovali secesija, v Nemčiji jugendstil in v Belgiji art nouveau. Skupaj s tradicionalnimi lokalnimi slogi so začeli nastajati hibridni secesijski slogi (Korovkina, 2020) (slika 2). Zaradi želje meščanstva, da arhitektura sledi evropskim smerem, so se začeli uporabljati zgodovinski modeli srednjeveške in orientalske arhitekture, ki za Poltavo niso bili značilni. Tovrstna arhitektura je vključevala zlasti dvorce in večstanovanjske najemne meščanske stavbe, katerih umetniška podoba je odsevala okus in družbeni položaj lastnikov (slika 3). Arhitektura javnih upravnih zgradb v mestu pa se je zgledovala zlasti po renesansi in klasicizmu.

Nastanek zemstev in kulturni razvoj sta spodbudila obujanje ljudske arhitekture, za razvoj ukrajinskega art nouveauja pa je bilo pomembno zlasti ukrajinsko narodnoosvobodilno gibanje. Avtorici sta analizirali slogovne značilnosti ohranjenih stavb v Poltavi z začetka 20. stoletja (zgrajenih pred



Slika 1: Laščeva večstanovanjska najemna meščanska stavba na Gogoljevi ulici 19 (ukr. *vulicja Gogolja*), zgrajena leta 1905; primer dekorativnega romantičnega sloga s primesmi racionalizma (ilustracija: Tetjana Savčenko).



Slika 2: Bahmuckijev dvorec na Ulici Pilipa Orlika 15 (ukr. *vulicija Pilipa Orlika*), zgrajen leta 1906; primer stilizacije mavrske arhitekture (ilustracija: Tetjana Savčenko).

letom 1917). Ugotovili sta, da je bilo 11 % proučenih stavb zgrajenih v zgodovinskem (tj. neoklasicističnem, neomavrskem ali eklektičnem) slogu, 38 % jih je bilo zgrajenih v opečnatem slogu, 10 % v slogu art nouveauja (pet stavb v ukrajinskem romantičnem slogu in po ena stavba v ruskem in severnjaškem romantičnem slogu) in 41 % v secesijskem slogu (Savčenko, 2020a, 2020b; Savčenko, 2021). Različni slogi v arhitekturi mesta kažejo heterogenost razredne strukturiranosti družbe. Stavbe, zgrajene na začetku 20. stoletja, so vplivale na urbanistično kompozicijo, saj so imele več nadstropij kot običajno, z njimi pa se je povečala tudi gostota zazidave (slika 4).

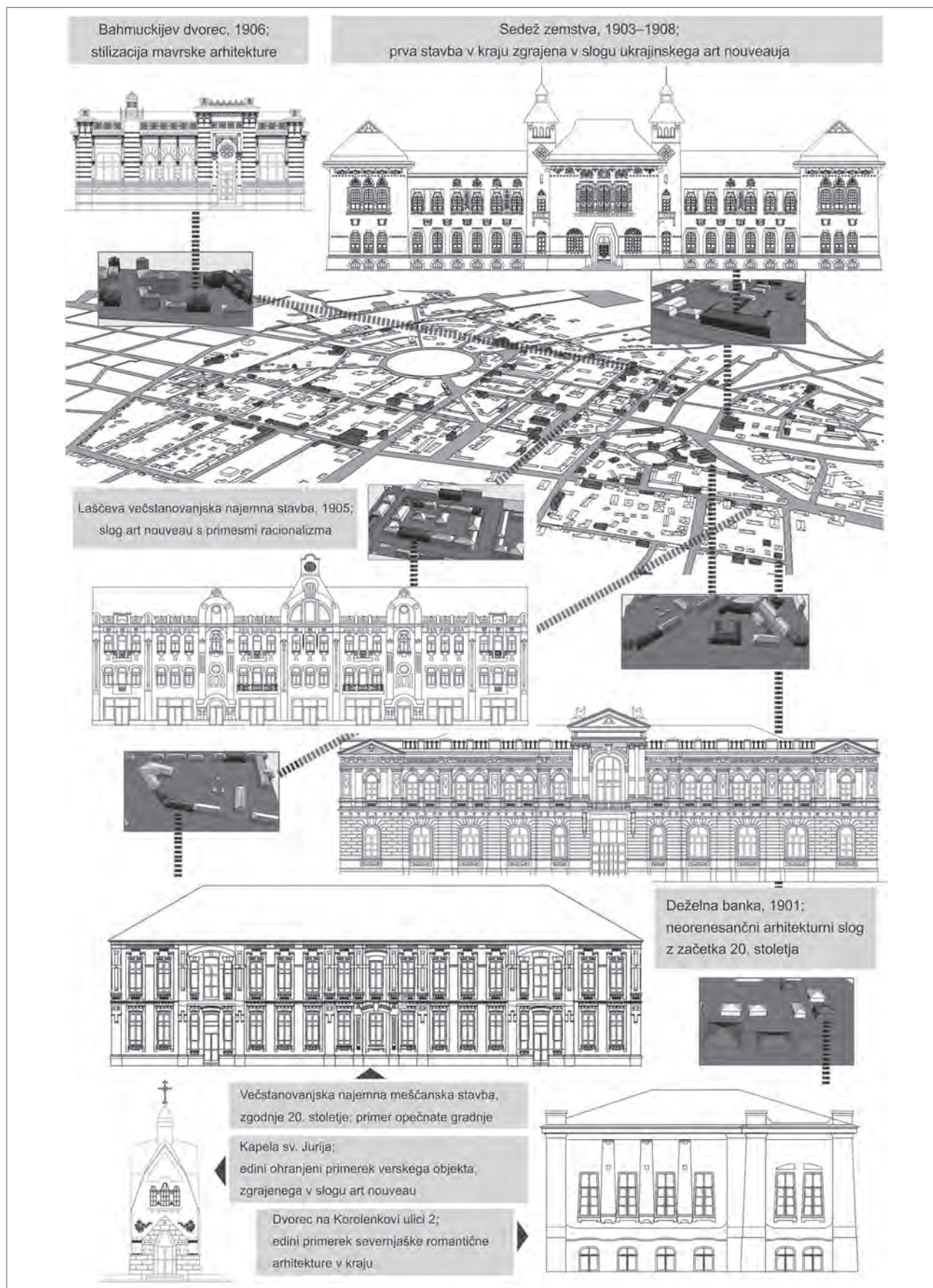
4.2 Razvoj ukrajinskega art nouveauja in njegove glavne značilnosti

Začetki ukrajinskega art nouveauja segajo na konec 19. in začetek 20. stoletja, ideološko pa je bila navedena smer zasnovana v Harkovu. Takrat je bil Harkov središče prizadevanj za obuditev narodne identitete. V njem sta delovala folkloristično gibanje in harkovska šola romantike, v okviru katerih se je ohranjala ukrajinska ljudska kultura. Ideje ukrajinskega art nouveauja so se arhitekturno najprej pokazale na stavbi, v kateri je bil sedež organa krajevne samouprave ali zemstva (zgrajena je bila med letoma 1903 in 1908) ter jo je zasnoval harkovski umetnik in arhitekt Vasil Kričevski. Poltavsko zemstvo je bilo znano po močni narodni zavesti, zaradi česar je dalo pobudo za gradnjo stavbe, ki bi izražala ljudsko ideologijo. Arhitektura njegovega sedeža je zato izražala duh takratne Poltave in narodno zavest

njenih prebivalcev, na katero so vplivale politične, kulturne in izobraževalne aktivnosti. Slovesno odkritje spomenika Ivanu Kotljarevskemu je pomembno vplivalo na izbiro arhitekturnega sloga za navedeno stavbo. Na prireditvi so se zbrale vodilne kulturne osebnosti v mestu: Mihajlo Kocjubinski, Lesva Ukrajinka, Mikola Lisenko, Boris Grinčenko, Vasil Stefanik in drugi.

Stavbe v središču Poltave imajo veliko okrasnih elementov, značilnih za ukrajinski art nouveau, zaradi česar se razlikujejo od tistih v središču Harkova, kjer prevladuje racionalistični slog. Uporabljeni so dinamične plastične kompozicije in bogato okrasje, poleg tega je značilno združevanje več umetniških tehnik (poslikav in majolike). Sedež zemstva je imel velik simbolni pomen, saj je ponazarjal novo fazo v razvoju ukrajinske kulture.

Zaradi podobe omenjene stavbe se je središče javnega življenja z Okroglega trga (ukr. *Krugla ploščā*), zasnovanega v ruskem slogu, preselilo na Petrov trg (ukr. *Petrovska ploščā*), kjer je stala stavba (Vadimov, 1991, 2019). Ta je bila na začetku 20. stoletja najpomembnejši objekt v mestu, zgrajen na območju nekdanje mestne trdnjave, ki je bila do 19. stoletja (preden je Poltava dobila status podeželskega mesta ruskega carstva) upravno in duhovno središče mesta (Kovalenko, 2015). Lokacija sedeža zemstva v zgodovinskem jedru mesta kaže na željo po vrnitvi h koreninam in obnovi identitete kraja. Stavba je simbolizirala suverenost, jamstvo za preživetje in neodvisen razvoj naroda ter narodno identifikacijo prebivalcev takratne Poltave.



Slika 3: Vpliv proučevanih stavb na mestno okolje (ilustracija: Tetjana Savčenko)



Slika 4: Morfološka analiza stavb, zgrajenih v slogu ukrajinskega art nouveauja (ilustracija: Tetjana Savčenko)

Druga pomembna stavba, zgrajena v slogu ukrajinskega art nouveauja, je bila cerkev Pokrova v vasi Pliševci (v okrožju Gadjač v Poltavski oblasti), ki jo je arhitekt Ivan Kuznecov zasnoval na podlagi slavnega primerka ukrajinske lesene arhitekture: katedrale Svete trojice v Novoselivki (1773–1778). Šlo je za stavbo z devetimi stolpi in piramidasto silhueto. Podobne kompozicijske rešitve so bile v baroku značilne za sakralno arhitekturo vzhodne Ukrajine. Cerkev v Pliševcih je postala simbol ponovne oživitve ukrajinske duhovnosti. Skoraj sočasno s sedežem zemstva (1903–1905) je bila v Poltavi zgrajena tudi šola, imenovana po Ivanu Kotljarevskem, ki sta jo zasnovala harkovska arhitekta Jevgen Serdjuk in Mihajl Stasjukov (porušena je bila leta 1943). Njena gradnja je imela tudi simbolni pomen, saj je bila prva javna šola, namenjena otrokom delavcev in kmetov. Stavba je bila kompaktna, z dvema nadstropjema in asimetrično kompozicijo. Navedene tri stavbe so ponazarjale naslednje tri glavne smeri razvoja ukrajinskega art nouveauja (Čepelik, 2000): dekorativno in romantično smer (sedež zemstva), neobaročno smer (cerkev v Pliševcih) in racionalistično smer (šola, imenovana po Kotljarevskem).

Navedene stavbe so simbolizirale tri pomembne družbene vrednote, ključne za uspešen in usklajen razvoj naroda (Čepelik, 2000): suverenost, duhovnost in splošno dostopno javno šolstvo. Pozneje so bile v Poltavi v slogu ukrajinskega art nouveauja zgrajene še naslednje stavbe: kapela sv. Jurija (1911–1914, arhitekt: Igor Kalbus) na Zinkivski ulici 16 a (ukr. *vulicja Zinkivska*), mestni dvorec na Stritenski ulici 37 a (ukr. *vulicja Stritenska*, 1912), obrtna šola za deklice, imenovana po Sergeju Kruljovu (1912, arhitekta: Oleksandr Varjanin in Sergij Timošenko, v drugi svetovni vojni je bila porušena, na njenem mestu je bila nato zgrajena sodobna telekomunikacijska stavba) in ljudska umetniška šola (1913, arhitekt: Sergij Timošenko).

Harkovski arhitekti so se pri oblikovanju objektov v Poltavi zgledovali po ljudski arhitekturi. Med projektiranjem stavbe, v kateri je bil sedež zemstva, je arhitekt Vasil Kričevski proučil ljudsko arhitekturo Poltave, Sumija, Černigova in harkovskih predmestij (Vitčenko, 2019). Uporaba oblik, detajlov in okraskov, značilnih za ljudsko arhitekturo stavb poltavske oblasti, na stavbah, zgrajenih v slogu ukrajinskega art nouveauja, poudarja identiteto kraja in kaže, da so se takratni prebivalci Poltave jasno dojemali kot pripadnike ukrajinskega naroda.

Posledično je Poltava postala eno izmed regionalnih središč ukrajinskega art nouveauja, pri čemer so arhitekti uporabljali naslednje regionalne kompozicijske in umetniške izrazne prvine: dinamične plastične kompozicije stavb, enoten notranji in zunanji slog stavb, mešanico umetniških tehnik v notranjosti in na zunanji strani zgradb (majolika, poslikave ter lesene in kamnite rezbarije), bogato okrasje in tople barvne odtenke.

4.3 Volumetrična in prostorska kompozicija stavb, zgrajenih v slogu ukrajinskega art nouveauja

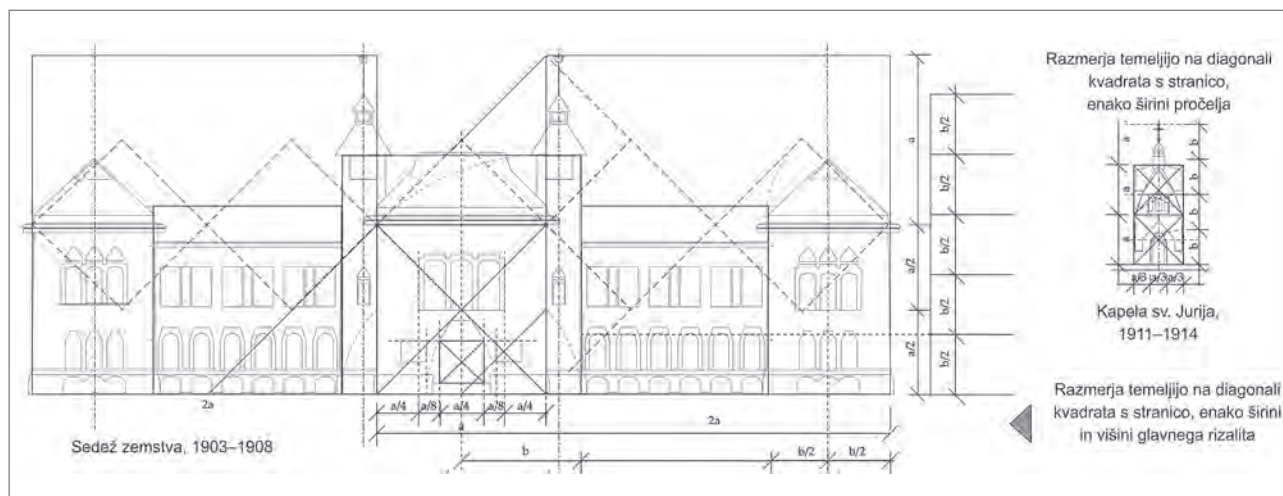
Volumetrična in prostorska kompozicija stavb, zgrajenih v slogu ukrajinskega art nouveauja, temelji na ljudski arhitekturi, značilni za posamezno regijo. Na tej podlagi so arhitekti zasnovali popolnoma novo podobo stavb, ki je ustrezala zahtevam in potrebam takratnega časa. Stavbe v Poltavi so bile zgrajene z (delnim ali popolnim) reproduciranjem, združevanjem in prevzemanjem drugih oblik na ravni celotne prostornine stavbe ali, kot to imenuje Vitčenko (2019), morfogenetskih vzorcev. Arhitekturo stavb so določali oblikovni vzorci, ki so bili izbrani glede na funkcionalni namen stavbe in njeno velikost. Sedež zemstva je arhitekt na primer oblikoval kot mešanico tradicionalne ukrajinske hiše, zvonika in cerkve (Vitčenko, 2019). Kapela sv. Jurija na Zinkivski ulici je bila zasnovana na modelu tradicionalnega zvonika, ljudska umetniška šola na Ulici ustave 2 a (ukr. *vulicja Konstituciji*) pa na modelu tradicionalne ukrajinske hiše (slika 3).

Za stavbe v Poltavi, zgrajene v slogu ukrajinskega art nouveauja, je značilna uporaba elementov različnih velikosti v njihovi kompoziciji. Sedež zemstva na primer vključuje velike rizalite, ogromen portal, sklope velikih oken in dva stolpa. Hkrati je pročelje z lizenami razdeljeno v manjše dele z večplastnimi drobnimi okraski in poslikavami.

Iz primerov stavb v slogu ukrajinskega art nouveauja v Poltavi so razvidna razmerja v njihovi arhitekturni kompoziciji, pri kateri je bila uporabljena metoda kvadratov in njihovih diagonal. Pri sedežu zemstva je osnova kvadrat s stranico, ki je enaka širini glavnega rizalita. Pri kapeli sv. Jurija, ki se v višino deli na tri dele, pa kompozicija temelji na širini spodnjega dela njenega pročelja (slika 5; Savčenko, 2020a).

4.4 Arhitekturni elementi ukrajinskega art nouveauja

Arhitekturni elementi imajo poleg kompozicije ključno vlogo pri razpoznavnosti ukrajinskega art nouveauja. So nosilci pomenskih značilnosti sloga (Antoshchuk, 2017; Antoščuk 2018). Arhitekturni elementi tega sloga temeljijo na strokovni in posodobljeni stilizaciji elementov tradicionalnih hiš in cerkva. Ikonični elementi tega sloga so stolpi in strehe, oblikovani v slogu ukrajinske sakralne arhitekture. Pogosta je aktivna uporaba stolpičev in stolpov v kompoziciji stavb, s katerimi so arhitekti želeli poudariti višino stavb, ki naj bi simbolizirala pogum Ukrajincev ter vzpon in zmago slavje narodne zavesti. Pri izražanju umetniške podobe stavb, zgrajenih v tem slogu,



Slika 5: Razmerja v arhitekturni kompoziciji pročelij stavb, zgrajenih v slogu ukrajinskega art nouveauja (ilustracija: Tetjana Savčenko)

imajo pomembno vlogo tudi strehe, ki poudarjajo edinstvenost sloga. Streha sedeža zemstva je tradicionalne oblike: čopasta s podstrešnim oknom v slemenu. Stolpa imata dvodelno štirikapno streho z navpično konico na vrhu. Ta oblika strehe je posebnost ukrajinskega art nouveauja. Tovrstno streho s strmejšimi strešinami na vogalih ima tudi kapela sv. Jurija na Zinkivski ulici, ki skupaj s pročeljem tvori značilno petkotno škarjasto obliko.

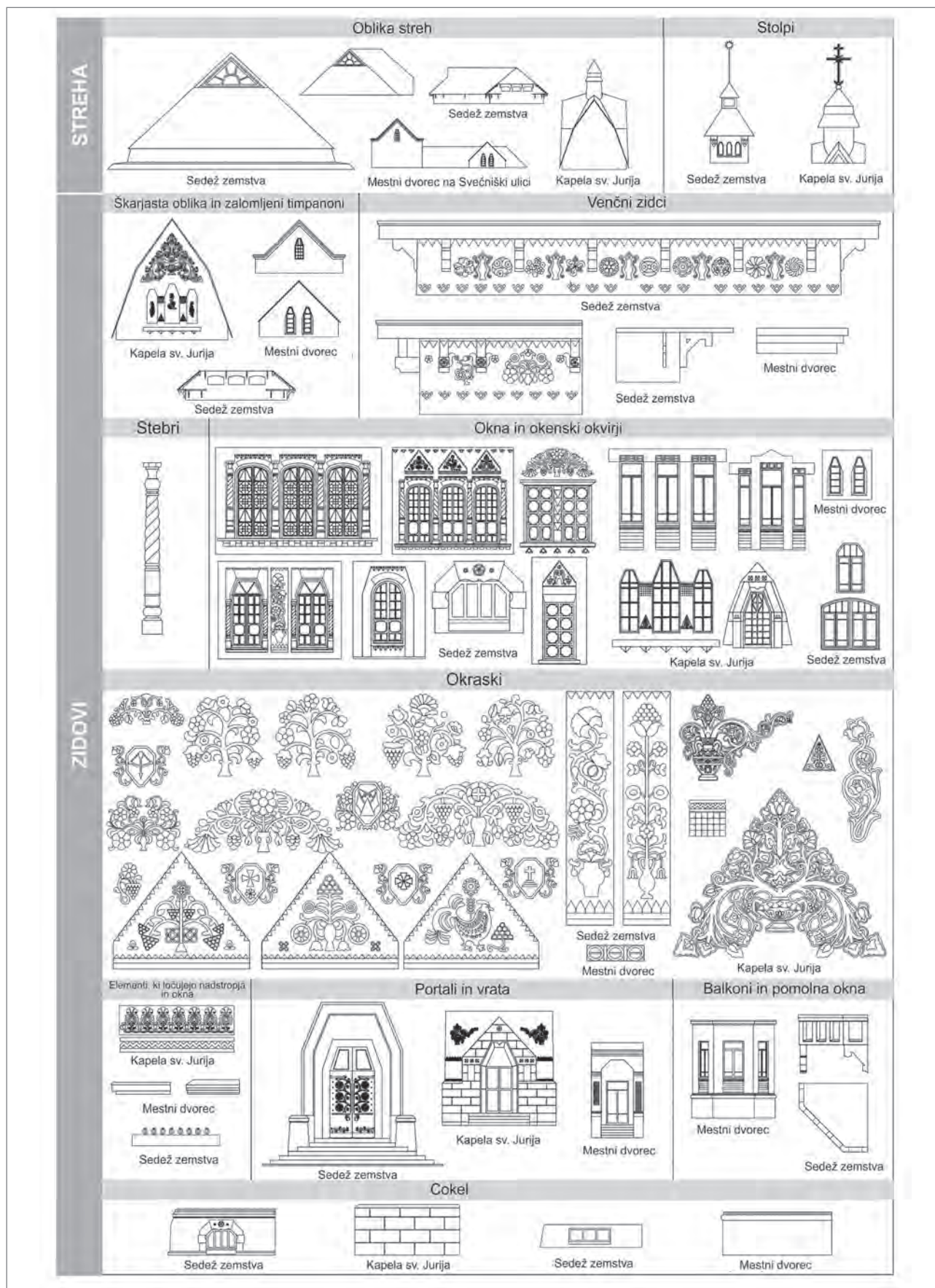
Pročelja stavb, zgrajenih v proučevanem slogu, razen talnih zidcev in zidnih vencev nimajo veliko vodoravnih elementov. Zidni venci imajo masivne police, ki so pri sedežu zemstva in ljudski umetni šoli podprte z nosilci. Najnovejše načelo, uporabljeno v arhitekturi ukrajinskega art nouveauja, je bila navpična členitev pročelij. Zidne ploskve so razdeljene s preprostimi lizenami, ki prehajajo v trapezoidne oboke, ki uokvirjajo okenske odprtine (Čepelik, 2000). Zidovi so obdelani s keramiko (glavno pročelje sedeža zemstva in kapela sv. Jurija), apnenim beležem (ljudska umetniška šola in mestni dvorec na Stritenski ulici 37 a) ali opeko (dvoriščno pročelje sedeža zemstva; Savchenko, 2020a), pročelja pa so okrašena tudi s poslikavami in majoliko (slika 6).

Pojav proučevanega arhitekturnega sloga in gradnja stavb, ki so ga najizraziteje ponazarjale, sta spodbudila proizvodnjo keramike, potrebne za gradnjo. To so bile predvsem keramične ploščice s posodobljenimi tradicionalnimi ukrajinskimi okrasnimi motivi. Med gradnjo sedeža zemstva so znova odprli keramične delavnice v Opišni. V projekt je bil vključen znani ukrajinski keramik Peter Vaulin, ki je takrat (leta 1904) poučeval na obrtni in umetniški šoli v Mirgorodu (Hanko, 2002). V delavnicah so izdelovali opeko in okrasne ploščice za pročelja. Ploščice za pročelje sedeža zemstva je v Opišni izdelal lončar Ivan Gladirevski (Ščerban, 2010). Majolično keramiko, grbe in ploščice za notranjost stavbe so izdelali v Mirohorodu, strešnike pa v tovarni v Malobudiščansku. Drugo fazo obnovl-

jene proizvodnje keramike na območju Poltave je spodbudila gradnja kapele na mestu, kjer so imeli kmetje v bitki pri Poltavi vojaški tabor. Kapela je bila postavljena v spomin na srečanje med predstavniki poltavske pokrajine in carjem Nikolajem II. med praznovanjem 200. obletnice omenjene bitke. Zaradi pomanjkanja izkušenih lončarjev v Poltavi so v Opišno povabili Jurija Lebiščaka, ki je prej delal v keramičnih delavnicah na Dunaju in Lvovu, vodil pa je tudi delavnico fasadne keramike v ukrajinskem Haliču. Obnovil je delovanje lokalnih keramičnih delavnic in jih uredil v prostorih zemstva Zinkiva. Z njim je v Opišno prišel tudi Mihal Ivaškevič, tja pa so povabili tudi lončarja Andrija Sidorenka in Petra Šumejka iz Mirgoroda. V Lebiščakovem delu v Poltavi se čuti vpliv zahodne ukrajinske tradicije, kar je prispevalo k delnemu poenotenju sloga v središčih ukrajinskega art nouveauja.

Za navedeni umetniški slog v Ukrajini so značilne posebne oblike oken in okenskih odprtin. Na mestnih stavbah so prevladovala trapezoidna šesterokotna okna, pri čemer so bile njihove stranice v različnih razmerjih: 1 : 2, 2 : 3 ali blizu kvadrata (npr. pri sedežu zemstva, kapeli sv. Jurija in ljudski umetniški šoli). Stavba, v kateri je sedež zemstva, ima več edinstvenih okenskih kompozicij, na primer trapezoidna šesterokotna okna, ki so ob straneh obdana s stebri, ki podpirajo pet trapezoidov, ter elipsasta okna v triforijih v kombinaciji s stebri in pravokotnimi nišami (okno nad glavnim portalom) ali trikotnimi nišami (okna v stranskih rizalilih). Portali krepijo izrazno moč pročelij. Njihova zasnova izhaja iz arhitekture lesenih cerkev, hiš in skednjev ter kamnite arhitekture 17. in 18. stoletja (Hanko, 1991). Čepelik (2000) v arhitekturi Poltave s konca 19. in začetka 20. stoletja loči te vrste portalov:

- portal v obliki vhodne lože (sedež zemstva); trapezoidna loža z vhodnim stopniščem in notranjo vratno odprtino v obliki trapezoida, v sredini so lesena vrata, na katerih je izrezljano drevo življenja, notranje stranske stene lože so okrašene s keramiko;



Slika 6: Arhitekturni elementi ukrajinskega art nouveauja v Poltavi na koncu 19. in začetku 20. stoletja (ilustracija: Tetjana Savčenko)

- portal v obliki naprej potisnjene veže (vestibula) s čopasto streho (dvoriščni vhodi sedeža zemstva) in trapezoidnimi vrati;
- portal v obliki portika s kvadratnima stebroma (mestni dvorec na 37 a);
- preprost portal s trapezoidno vratno odprtino in kamnitim okrasnim okvirjem (kapela sv. Jurija).

Značilnost ukrajinskega art nouveauja je tudi združevanje umetniških tehnik pri okraševanju pročelij in notranjosti stavb, pri čemer je viden vpliv prevladujočih umetniških slogov v takratni Evropi: secesije, libertyja in jugendstila. V ljudski arhitekturi ukrajinskih regij je bila razširjena uporaba glazirane keramike pri okraševanju stavb. Keramika je narejena iz naravnih materialov (tj. gline), uporaba katerih izraža estetske ideale ljudi in ustreza lokalnim podnebnim razmeram (Seliščeva, 2007). Umestitev grbov kozaških polkov poltavske pokrajine na pročelje sedeža zemstva je imela velik simbolni pomen. Vsak grb je predstavljal eno izmed mest v pokrajini, pri čemer je bilo ime mesta pod posameznim grbom navedeno v ukrajiniščini, kar je bilo v ruskem carstvu takrat prepovedano.

4.5 Nadaljnji razvoj ukrajinskega art nouveauja

Druga faza razvoja ukrajinskega art nouveauja je potekala v dvajsetih in tridesetih letih 20. stoletja. Glavne predstavnice navedene faze v Poltavi so stanovanjske stavbe na Stolni ulici 15 (ukr. *vulicja Sobornosti*), Lisenkovi ulici 16 in 18 (ukr. *vulicja Lisenka*) in Ulici stotih nebeških junakov 36 (ukr. *vulicja Nebesnoji Sotni*) ter javne stavbe, kot je na primer železničarski klub na Trgu slave 3 (ukr. *plošča Slavi*). Večina stavb, zgrajenih v tem slogu, je zunaj starega mestnega jedra. Njihova tridimenzionalna zasnova in okrasje sta veliko bolj omejena in racionalna v primerjavi s stavbami, ki so bile zgrajene med razcvetom ukrajinskega art nouveauja na začetku 20. stoletja. Slog se zaradi neskladnosti z državno ideologijo in prepovedi izražanja narodne tradicije ni vidno razširil (Beljavka, 2013). Pazljivi poskusi dodajanja narodnih prvin so opazni v arhitekturnih elementih večnadstropnih stanovanjskih zgradb na Ulici Anatolija Kukobe 47 (ukr. *vulicja Anatolija Kukobi*, 1938) in Evropski ulici 27/24 (ukr. *Jevropejska vulicja*, 1940), zgrajenih konec tridesetih let 20. stoletja, ter vrtca na Samostanski ulici 7 a (ukr. *vulicja Monastirska*, 1937). Značilnosti ukrajinskega art nouveauja so poleg tega delno vidne še v okrasnih elementih na pročeljnih stanovanjskih zgradb, zgrajenih med letoma 1950 in 1960, kompoziciji nekaterih zgradb iz osemdesetih let 20. stoletja (npr. regionalnega lutkarskega gledališča, 1983; Asejev, 1989) in slogovnih interpretacijah sodobne arhitekture (slika 7).

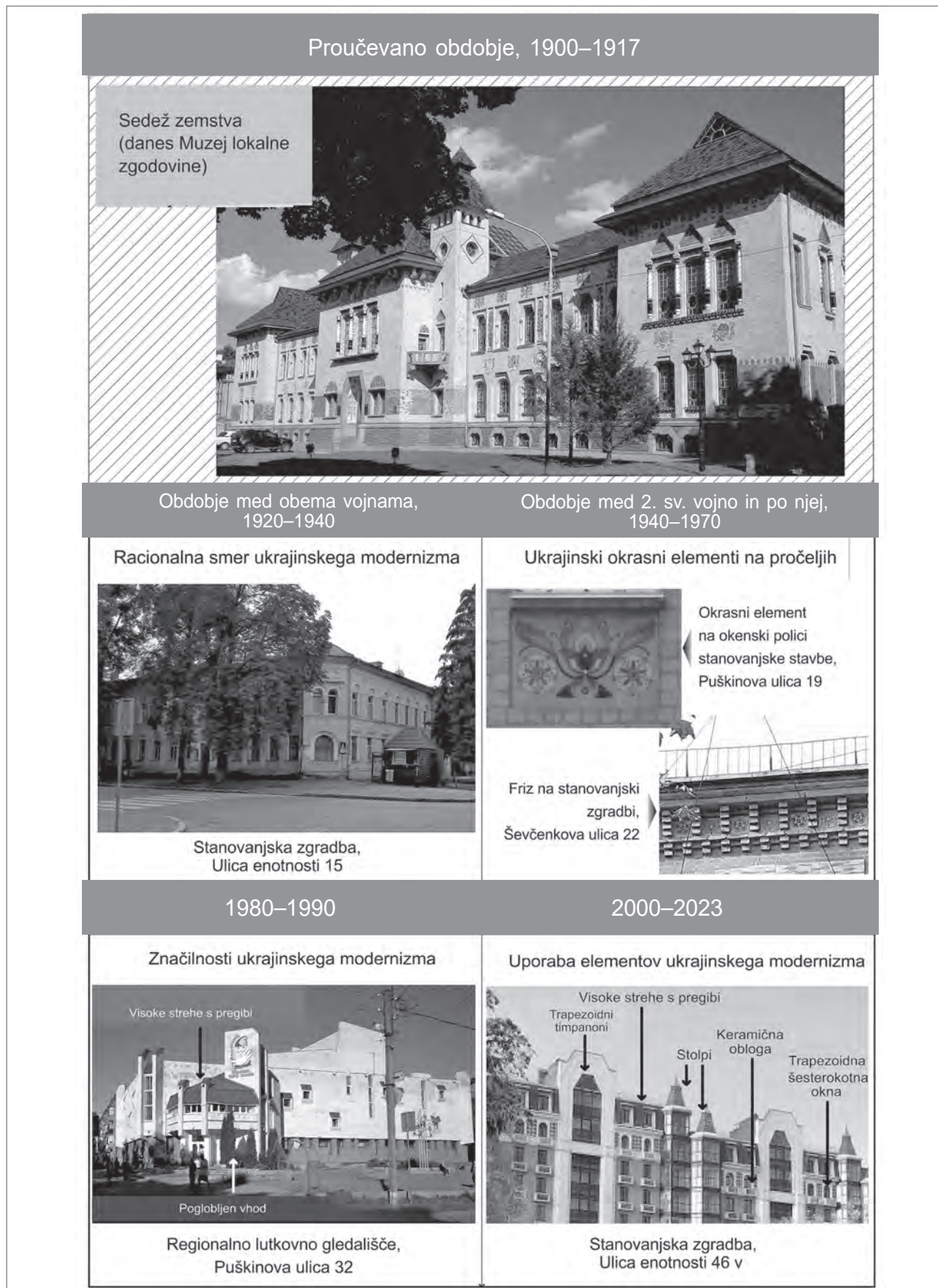
5 Razprava

Sodobna ukrajinska arhitektura je še v razvojni fazi. Od razglasitve neodvisnosti države leta 1991 se ukrajinskim arhitektom odpirajo nove ustvarjalne priložnosti, pod vplivom globalizacije in dojemanja arhitekture kot proizvoda masovne potrošnje in masovne kulture pa se v arhitekturi ruši ravnovesje med mednarodnim slogom in nacionalno izvirnostjo (Vadimov, 2019). Zaradi izgube regionalnih in nacionalnih posebnosti v arhitekturi je prepoznavanje identitete kraja in njegovih posebnosti ali *geniusa loci* še posebej pomembno. Pojem *geniusa loci* poleg materialnega obsega tudi nematerialni ali duhovni vidik. Ustvarja posebno vzdušje v mestnem okolju (njegovo edinstveno naravo), ki se ujema z miselnostjo prebivalcev in identiteto kraja. Na mednarodni ravni se čedalje bolj poudarja nesnovni vidik kulturne dediščine, kar potrjuje tudi Quebeška deklaracija o ohranjanju *geniusa loci*, sprejeta leta 2008.

Zgodovinska in kulturna dediščina je osnova morfologije sodobnega mestnega okolja. Njeno ohranjanje je pomemben dejavnik pri oblikovanju mestne kulture. Raziskovalci ugotavljajo, da je v času globalizacije ohranjanje edinstvenosti okolja glavni vir trajnostnega razvoja mest (Blinova, 2016). Pri reševanju vprašanja identitete mesta in vključevanju regionalnih prvin v sodobno arhitekturo bi se lahko uporabili arhitekturna in kompozicijska sredstva in tehnike ukrajinskega art nouveauja z začetka 20. stoletja, kar bi pomagalo ohraniti značilnosti ukrajinske kulture v arhitekturi, s čimer bi se dedni zapis naroda prenašal na poznejše generacije.

Trenutno je ohranjanje zgodovinske in kulturne dediščine v Poltavi, vključno s stavbami, zgrajenimi v slogu ukrajinskega art nouveauja, problematično. Samo en objekt je vpisan v *državni register kulturne dediščine nacionalnega pomena* (tj. stavba, v kateri je bil nekdanji sedež zemstva; evidenčna št.: 160034-H), dva pa sta vpisana v register kulturne dediščine lokalnega pomena (ljudska umetniška šola pod evidenčna št.: 20-PL in kapela sv. Jurija pod evidenčno št. 11-PL). *Čprav so navedene stavbe* spomeniško zaščitene, jih to ne more obvarovati pred propadanjem. Kapela sv. Jurija na Zinkivski ulici 16 a je trenutno v slabem stanju. Okrasna keramika na pročelju, iz katere so razvidne kulturne značilnosti poltavske regije, hitro propada. Tudi drugi objekti, zgrajeni v slogu ukrajinskega art nouveauja, so v skrb vzbujajočem stanju. Da bi ohranili nacionalne značilnosti arhitekture v Poltavi, bi bilo treba ob hkratnem upoštevanju težav pri ohranjanju arhitekturnih spomenikov ukrajinskega art nouveauja izvesti naslednje ukrepe:

- vse ohranjene arhitekturne spomenike ukrajinskega art nouveauja z začetka 20. stoletja bi bilo treba vnesti v državni register kulturne dediščine;
- treba bi bilo oblikovati seznam objektov, ki imajo značilnosti art nouveauja in so bili zgrajeni pozneje (do konca



Slika 7: Značilnosti ukrajinskega art nouveauja od dvajsetih let 20. stoletja do dvajsetih let 21. stoletja (ilustracija: Tetjana Savčenko)

- 20. stoletja), da se lahko dodajo v državni register;
- priporočljivo bi bilo organizirati javne prireditve, v okviru katerih bi širili znanje o posebnostih zgodovinske gradnje v mestu, vključno z objekti, zgrajenimi v slogu ukrajinskega art nouveauja kot izraza narodne izvirnosti;
- v sodobnem arhitekturnem oblikovanju bi bilo treba uporabljati kompozicijska sredstva ukrajinskega art nouveauja, kar bi pomagalo ohranjati identiteto kraja.

Priporočila za uvajanje prvin ukrajinskega art nouveauja v sodobno arhitekturo sta predstavila tudi Antoščuk (2018) in Vitčenko (2019). Kot ugotavlja Antoščuk (2018: 15), je dediščinski pristop k uporabi tradicionalnih narodnih prvin v sodobni arhitekturi eden izmed najobetavnejših, saj temelji na kreativnem razmisleku o dosežkih preteklih obdobij in njihovi vključitvi v arhitekturo z uporabo sodobnih oblikovalskih rešitev in gradbenih materialov. Podoben pristop k ljudski arhitekturi je bil uporabljen tudi med razvojem in razcvetom ukrajinskega art nouveauja na začetku 20. stoletja.

Vitčenko (2019: 19) pa predlaga uporabo tradicionalnih oblikovnih vzorcev pri snovanju novih objektov (npr. cerkev, zvonikov, kapel, koč, samostanov, shramb, vrat in večstanovanjskih stavb). Na podlagi morfogenetskih vzorcev (reprodukcije, preobrazbe, združevanja, vključevanja in prevzemanja) na vseh ravneh strukturne hierarhije je mogoče ustvariti nekaj novega (prostornino, elemente in detajle). Navedene vzorce bi bilo treba uporabljati v sodobni oblikovalski praksi in analizirati rezultate. Raziskave nacionalnih prvin arhitekture v Poltavi se izvajajo tudi v 21. stoletju. Glavni prispevek raziskave, predstavljene v tem članku, pa bi bil lahko predlog za vpis objektov v državni register kulturne dediščine in njihovo posledično spomeniško zaščito.

6 Sklep

Ukrajinski art nouveau se je razvijal sočasno z art nouveaujem drugje po Evropi. Tako kot v skandinavskih in baltičkih državah je v obdobju odvisnosti od večjih držav tudi v Ukrajini odražal narodni prepoved. Z vidika ideologije in umetniških rešitev se je v celoti ujemal z mednarodnimi umetniškimi smermi, ki so se konec 19. in začetek 20. stoletja širile po Evropi, hkrati pa je zaradi krepitve narodne zavesti postal najbolj izviren narodni slog. Tako kot v severni Evropi in v drugih vzhodnoevropskih državah sta bila za ukrajinski art nouveau značilna obujanje ljudskih prvin in krepitev narodne identitete. V arhitekturi Poltave se je navedeni slog oblikoval pod vplivom podobnih mednarodnih slogov, kot so secesija, neoklasicizem in opečnata gradnja. Odražal je takratno raven družbenega razvoja, hkrati pa je utelešal poglede ustvarjalnih izobražencev.

Z ukrajinskim art nouveaujem sta se izražali identiteta kraja in naroda. Tudi v Poltavi je pomemben del zgodovinske in kulturne dediščine. Njegovo ohranjanje je ena izmed glavnih nalog sodobnega razvoja mesta. Avtorici upata, da se bodo pomenske značilnosti in metode razvoja tega sloga kazale tudi v razvoju sodobne arhitekture, ki bo vključevala narodne prvine, in bodo pomagale krepiti ukrajinske kulturne vrednote. Ohranjanje nacionalne izvirnosti je eden izmed glavnih težav sodobne arhitekture, saj mora zadovoljevati tako materialne kot nematerialne potrebe posameznega naroda.

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UDK: 711.4:330.34(292.6)

doi:10.5379/urbani-izziv-2023-34-01-04

Prejeto: 23. 4. 2023

Sprejeto: 24. 5. 2023

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Urbana ekonomija na globalnem jugu: raziskava člankov, objavljenih v reviji *The Economist*

Analizam s področja urbane ekonomije se na globalnem jugu namenja le malo pozornosti. Zaradi pandemije COVID-19 in njenih posledic, vidnih zlasti na mestnih območjih, je postala urbana ekonomija spet pomembnejša, pri čemer bi bilo treba raziskati, kako so se njena načela dejansko uporabljala. Med drugim bi bilo treba proučiti, kako so o afriškem gospodarstvu, ki je med vrhuncem pandemije pritegnilo veliko pozornosti, razpravljali ekonomisti. Ali so pozornost namenili tudi mestnim gospodarstvom v Afriki? Kako podrobno so jih analizirali? Ali predlagane politike gospodarskega okrevanja izražajo realnost mestnih gospodarstev v Afriki? Ker odgovorov na navedena vprašanja v ekonomski literaturi ni mogoče najti, je avtor v članku proučil in analiziral vsebino več kot

500 člankov o pandemiji COVID-19, objavljenih v reviji *The Economist*. Izsledki raziskave so pokazali, da se je večina ekonomskih analiz osredotočala na države ali regije, le malo pa se jih je nanašalo na afriška mestna gospodarstva. Tudi če so članki obravnavali afriška mesta, so bili pod vplivom prevladujoče urbane ekonomije precej zavajajoči. Navedeni izsledki odpirajo nekatera pomembna vprašanja glede politik gospodarskega okrevanja (mest), predlaganih v *The Economistu*. Raziskava je pokazala, da nekateri vidiki prevladujoče urbane ekonomije omejujejo njen potencial.

Ključne besede: mesta, urbana ekonomija, *The Economist*, globalni jug

1 Izziv mest: odločanje med življenjem, smrtjo in gospodarstvom

Večina ljudi živi v mestih, v naslednjih treh desetletjih pa bo delež mestnih območij po svetu še naprej naraščal (s 56 % leta 2021 na 68 % leta 2050). Posledično se bo tudi število mestnih prebivalcev, večina katerih živi v Afriki in Aziji, povečalo za 2,2 milijarde (UN-Habitat, 2022: XV). Ukrepi na področju urbanističnega načrtovanja so velik izziv za mesta na globalnem jugu, pri čemer je najbolj pereče vprašanje, kako analizirati in upravljati mestna gospodarstva na tem območju (Zhang, 2015: xvi–xvii; UN-Habitat, 2022: 103–138). Afriška mestna gospodarstva odsevajo in poganjajo državna gospodarstva (Njoh, 2003; Obeng-Odoom, 2010; Ahimah-Agyakwah idr., 2022). Podobno kot mestna gospodarstva drugje po svetu (UN-Habitat, 2022: 103–138) tudi tista na globalnem jugu niso samo preprosto del večjih gospodarstev. Ta so povezana z gospodarsko organizacijo in obliko mest, vendar je treba mestna gospodarstva proučevati tudi posebej.

Kljub vsemu je v urbani ekonomiji analizam mestnih gospodarstev na globalnem jugu namenjene razmeroma malo pozornosti (Glaeser in Henderson, 2017). Mnenja raziskovalcev o tem, ali se lahko navedena gospodarstva proučujejo z enakimi orodji, kot se uporabljajo v prevladujoči urbani ekonomiji, se razlikujejo (glej npr. Zhang, 2015, xvi–xxii; Obeng-Odoom, 2013a, 2013b, 2016). V zadnjem času ekonomski geografi in vodilni urbani ekonomisti (Glaeser in Henderson, 2017; Randolph in Storper, 2022) zagovarjajo tezo, da se lahko ti izzivi osvetlijo in premagajo z uporabo splošno sprejetih in ustaljenih orodij urbane ekonomije. Vprašanje torej ni več, ali bi bilo treba urbane ekonomske analize uporabiti tudi za globalni jug, ampak to, kako so mesta na globalnem jugu obravnavana v prevladujoči urbani ekonomiji.

Pandemija COVID-19, ki je svet prizadela med letoma 2020 in 2023, omogoča primeren okvir za proučevanje navedenega vprašanja. Med pandemijo so številni ekonomisti analizirali težke odločitve med življenjem, smrtjo in gospodarskimi koristmi po svetu (*The Economist*, 2020r). Njihove analize pa so se skoraj vedno osredotočale na gospodarstva posameznih držav ali na svetovno gospodarstvo (glej npr. Murray, 2020) in na to, kako ekonomisti razlagajo in poskušajo spremeniti svet (Mackenzie idr., 2007). Dosedanje raziskave mest in pandemije COVID-19 (npr. Asante in Mills, 2020; Finn in Kobayashi, 2020; Ojong, 2020; Onyishi idr., 2020) se niso ukvarjale z vprašanji, povezanimi z urbano ekonomijo.

Poleg analiz v okviru akademske ekonomije so v medijih objavljene številne ekonomske analize, vključno s članki o afriških

gospodarstvih med vrhuncem pandemije. Ni pa jasno, koliko in kako so te analize izražale realnost afriških mestnih gospodarstev. Nujno bi bilo treba odgovoriti na tri vprašanja: Ali so ekonomisti pozornost namenili tudi mestnim gospodarstvom v Afriki (1. raziskovalno vprašanje)? Kako podrobno so jih analizirali (2. raziskovalno vprašanje)? Ali predlagane ekonomske politike izražajo splošne značilnosti in posebnosti mestnih gospodarstev v Afriki (3. raziskovalno vprašanje) (glej npr. *The Economist*, 2020r, 2020t)? V medijih je bilo objavljenih ogromno raziskav s področja urbanih in regionalnih študij (npr. Molotch, 1970; Molotch in Lester, 1999; Sa, 2009; Mirrlees, 2017; Grisold in Theine, 2020; Harjuniemi, 2020; Shin in Bonjumbun, 2021), ki pa se z navedenimi vprašanji ne ukvarjajo.

Odgovore lahko ponudi raziskava člankov v *The Economistu*. Samo v letih 2020 in 2021 je bilo v reviji objavljenih več kot 500 (504) člankov o pandemiji COVID-19, ki jih je prebralo okoli 1,2 milijona ljudi po svetu (*The Economist Group*, 2021: 18–19). Bralci so bili še posebej pozorni na novice o pandemiji, tem so namenili kar 25 % časa, ki so ga porabili za branje celotne revije (*The Economist*, 2021). S tolikšnim vplivom se ne more pohvaliti noben akademski ekonomist.

Vizija revije *The Economist* (2020y: 48) je liberalizem – filozofija razsvetljenstva, ne ameriške levice. Revija se nikoli ni odmaknila od te desničarske ideologije razsvetljenstva (Starr, 2004; Zevin, 2019), zaradi česar se teme, ki jih obravnava, niso zožile, ampak ravno nasprotno: taktika in obseg revije sta se razširila. Nobena druga revija ali časopis ne poroča o ekonomskih vprašanjih toliko kot *The Economist*, ki ima tudi sicer velik vpliv na ekonomijo in politiko (Harjuniemi, 2020). Njene urednike o aktualnih zadevah redno obvešča britansko ministrstvo za finance, revija pa je hkrati ključna platforma, na kateri voditelji nagovarjajo svet (Zevin, 2019; Obeng-Odoom, 2022a, 2022b). Ena izmed njenih rubrik je namenjena Bližnjemu vzhodu in Afriki, zato je analiza člankov, objavljenih med pandemijo COVID-19, primerna za raziskavo navedene problematike.

Vsebinska analiza več kot 500 člankov, objavljenih v reviji med letoma 2020 in 2021, je pokazala, da se je večina ekonomskih analiz osredotočala na države ali regije, pri čemer je bilo le malo pozornosti namenjene afriškim mestnim gospodarstvom. Redki članki, ki so obravnavali navedena gospodarstva, so pod vplivom prevladujoče urbane ekonomije ponujali zavajajoče izsledke. Posledično so tudi glavni predlogi za gospodarsko okrevanje afriških mest sporni. Članek je razdeljen na tri poglavja: metode, rezultate in razpravo. V prvem je avtor pojasnil, kako je podatke zbral in analiziral. Drugo poglavje je razdeljeno v dve podpoglavji, v katerih je avtor opisal posledice pandemije COVID-19 v Afriki na različnih ravneh (1. in 2. raziskovalno vprašanje) in predstavil ekonomske strategije reševanja zaznane

krize v gospodarskem razvoju mest (3. raziskovalno vprašanje). V razpravi se je avtor osredotočil na glavne omejitve prevladujočega pristopa v urbani ekonomiji.

2 Metode

Članki v medijih pogosto veljajo za neznanstvene, zato naj ne bi spadali v znanstvene raziskave. Kljub temu so novice in analiza njihove vsebine ključne pri raziskavah s področja urbane ekonomije. Iz novic lahko na primer izvemo, koliko stanejo nepremičnine v mestih (Munro, 2018), mnogi raziskovalci, ki analizirajo mesta (glej npr. Molotch, 1970; Munro, 2018; Shin in Boonjubun, 2021), zato čedalje pogosteje proučujejo tudi vsebino novic. Tovrstne vsebinske analize (Starr, 2004; Lammensalo, 2021; Atria idr., 2022; Obeng-Odoom, 2022b; Tarvainen, 2022) se običajno osredotočajo na to, kaj je nekdo povedal ali zapisal, pomembne pa so predvsem zato, ker razkrijejo tisto, kar obstaja, a avtor ne želi povedati (Munro, 2018). Kar je skrito, razkrije tudi avtorjevo ideološko usmeritev, zanimanja in cilje. Zbiranje podatkov na podlagi tistega, kar je v časopisu očitno, in tistega, kar je v njem skrito (Holsti, 1961: 12–14), je zato lahko eden izmen načinov proučevanja mestnih pojavov.

Kljub navedenemu je uporaba časopisnih vsebin še vedno deležna številnih kritik. Kot povzema Munrojeva (2018), za tovrstne metode velja, da zgolj reciklirajo stare članke, nimajo nič skupnega s prakso in niso sistematične. Hkrati lahko nanje pogledamo iz drugega zornega kota. Že res, da se novice reciklirajo, namen analize novic, tudi starejših, pa je spoznati realnost. Če je vsebinska analiza dobro izvedena, je lahko sistematična in pregledna, tako da je za vsak citirani članek mogoče najti vir. Vsekakor obstaja dovolj razlogov, da se metoda lahko uporablja v nadaljnjih raziskavah (Munro, 2018: 1101).

Pri vsebinskih analizah prevladujeta dve metodi: deduktivna (zlasti pri bibliografskih raziskavah) in induktivna (pri analizah diskurza). Prva temelji na štetju besed in teoriji, druga na štetju besed in izkušnjah. Obe sta nezadovoljivi, saj sta samo delni (Lainé, 2019, 776–779). Abduktivna vsebinska analiza, uporabljena v tem članku, je bolj celostna metoda (Lainé, 2019: 776–779) in je primernejša za raziskavo obravnavane problematike. Avtor je podatke zbral iz *The Economist*, ki v svojem žanru velja za najvplivnejšo revijo na svetu, in jih analiziral. V času zbiranja podatkov je bil avtor na revijo naročen. Bral je tiskane izvode revije. Med pregledom skupno 140 številke je postalo jasno, da so bili lahko članki o pandemiji COVID-19 vključeni v katero koli rubriko revije. Osredotočil se je na članke, objavljene med letoma 2020 in 2021, saj je bila v tem obdobju objavljena večina člankov o pandemiji. Kot je bilo navedeno v reviji (*The Economist*, 2021c), je bila leta

2020 pandemija omenjena v skoraj polovici njenih člankov, kar je največji delež, evidentiran za katero koli temo po drugi svetovni vojni (glej tudi *The Economist*, 2020x).

Leta 2021 je število novic o pandemiji COVID-19 močno upadlo (glej sliko 1), nedavna raziskava uradnih govorov med pandemijo COVID-19 (Atria idr., 2022: 445) pa je pokazala, da se je razprava o pandemiji razplamtela v samo treh mesecih. Munrojeva navaja, da za vsebinsko analizo zadostuje 222 člankov (2018: 1094), kar pomeni, da je več kot 500 novic, objavljenih v več kot dveh letih, ki jih je avtor pregledal, za raziskavo več kot dovolj.

Za analizo digitalnih novic (tako besedilnih podatkov kot videov in drugih digitalnih vsebin) se lahko uporablja program *Atlas.ti* (Hwang, 2008: 525), kar pa pri analizi tiskanih izvodov revije *The Economist* ni prišlo v poštev. Izsledki raziskav (npr. Holsti: 1969, 150–194; Lainé, 2019: 776–779), v katerih so avtorji uporabili ali zagovarjali analize kvalitativnih podatkov, so pokazali, da se lahko v takih primerih učinkovito uporabijo tudi druge strategije analize kvalitativnih podatkov. Z izločitvijo programov za štetje besed se dejansko izognemo tudi tveganju, da besede štejemo, ne da bi jih prebrali, in da besede beremo brez konteksta.

Avtor je zato članke bral zelo natančno. Najprej je opredelil dve glavni vsebinski kategoriji analize: COVID-19, mesta in gospodarski razvoj (mest) ter gospodarsko okrevanje (mest). Kategoriji sta vsebovali opredelitev problematike in rešitve, navedene v reviji, hkrati pa namen raziskave, kar je eden izmed meril kritične vsebinske analize (Holsti, 1969: 95). Avtor je nekatere članke sprva težko razvrstil v izbrani pomenski družini (Atria idr., 2022: 446) ali kategoriji (Holsti, 1969: 94–126), vendar sta mu pri tem pomagala večkratno ponovno branje in refleksija, kar se ujema tudi z izsledki nedavne raziskave Moire Munro (2018, 1094). Kot ugotavljajo Kahneman idr. (2021: 223, 257–258, 300–311), morajo biti kompleksne presoje pri analizi podatkov razdeljene na vmesne dokumentirane korake, pri čemer je treba presoditi vsak korak posebej, na koncu pa na tej podlagi oblikovati končno presojo. Avtorju je pri analizi pomagalo tudi označevanje citatov, ki so bili še posebej lucidni in reprezentativni. Kot je razvidno s slike 1, je leta 2021 število novic v vseh proučevanih delih revije – tj. na naslovnici in v rubrikah *Leaders*, *Briefing*, *Middle East & Africa*, *Business*, *Finance & Economics*, *Science & Technology* in *Specials* – močno upadlo, zato je bilo treba za to leto analizirati tudi manj podatkov.

Avtor je v analizo vključil samo tiste članke v zvezi s pandemijo, ki so imeli v naslovu besede in besedne zveze, ko so COVID-19, kužna bolezen, pandemija in postpandemično obdobje (glej preglednico 1). Najprej je vse številke revije

Preglednica 1: Analiza člankov o pandemiji COVID-19 v reviji *The Economist*, ki so se nanašali na Afriko in preostali svet, 2020–2021

| | Leto | Jan.–feb. | Mar.–apr. | Maj–jun. | Jul.–avg. | Sep.–okt. | Nov.–dec. | Skupaj |
|-------------------------------------|------|-----------|-----------|----------|-----------|-----------|-----------|--------|
| Število pregledanih številke revije | 2020 | 9 | 8 | 9 | 9 | 9 | 9* | 53 |
| | 2021 | 9 | 8 | 9 | 9 | 9 | 7 | 51 |
| Naslovnica | 2020 | 6 | 7 | 16 | 9 | 3 | 6 | 47 |
| | 2021 | 6 | 4 | 8 | 8 | 5 | 3 | 34 |
| Leaders | 2020 | 4 | 19 | 23 | 8 | 7 | 6 | 67 |
| | 2021 | 6 | 5 | 4 | 4 | 3 | 2 | 24 |
| Briefingt | 2020 | 1 | 12 | 9 | 2 | 2 | 2 | 28 |
| | 2021 | 3 | 1 | 3 | 1 | 1 | 1 | 10 |
| Middle East & Africa | 2020 | 0 | 4 | 10 | 6 | 1 | 1 | 22 |
| | 2021 | 1 | 2 | 1 | 2 | 0 | 2 | 8 |
| International | 2020 | 6 | 11 | 10 | 6 | 4 | 4 | 41 |
| | 2021 | 1 | 1 | 5 | 3 | 1 | 1 | 12 |
| Business | 2020 | 1 | 10 | 28 | 14 | 6 | 4 | 63 |
| | 2021 | 3 | 1 | 2 | 1 | 0 | 1 | 8 |
| Finance & Economics | 2020 | 2 | 23 | 22 | 10 | 8 | 3 | 68 |
| | 2021 | 1 | 2 | 3 | 4 | 2 | 1 | 13 |
| Science & Technology | 2020 | 1 | 12 | 14 | 4 | 2 | 5 | 38 |
| | 2021 | 6 | 3 | 3 | 0 | 1 | 2 | 15 |
| Specials‡ | 2020 | 0 | 1 | 2 | 1 | 1 | 0 | 5 |
| | 2021 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |

Vir: avtor

Opombe: * Zadnja številka je bila dvojna številka in je vsebovala analizo deleža novic v reviji, ki so se nanašale na COVID-19 (*The Economist*, 2020x); † redna poročila (ne občasna ali ekonomska poročila); ‡ ta kategorija obsega rubrike *Special Reports, By Invitation* in *Technology Quarterly*.

iz let 2020 in 2021 razvrstil po mesecih, nato pa je združil številke, objavljene januarja in februarja, marca in aprila ter tako naprej vse do novembra in decembra. Zanesljivost zbranih podatkov je izboljšal tako, da je številke najprej razdelil v manjše skupine in jih pregledal, da je našel vse primerne članke, ki jih je nato seštel in vnesel v Excelove preglednice. Podobno metodo je uporabil tudi Lainé (2019) v raziskavi francoskih časopisov.

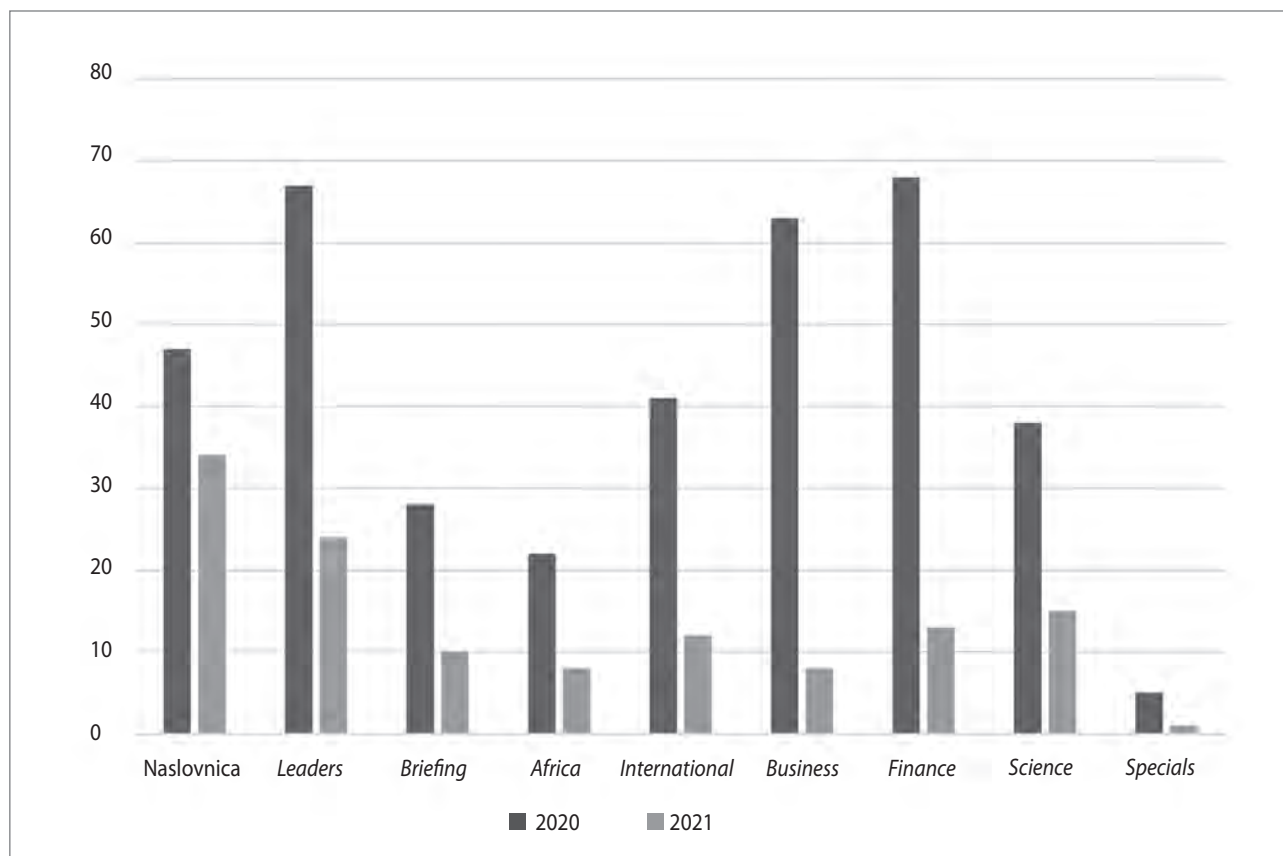
Zanesljivost dobljenih podatkov je poleg tega izboljšal tako, da je iste številke v več kot dveh letih (2020–2023) prebral večkrat in ob različnih časih, da je podatke zbiral iz več rubrik revije in o njih razpravljal na forumih. Z navedenimi koraki je zmanjšal tudi šume pri analizi podatkov, ki so lahko posledica nešteti dejavnikov, tudi raziskovalčevega razpoloženja. Če je le mogoče, je treba pri tovrstnih raziskavah presoje znova preveriti ob različnih časih, ko so tudi dejavniki omenjenih šumov različni (Kahneman idr., 2021: 257–258). Z večkratnim prebiranjem iste številke je lahko bolje razumel revijo in zgodbe, ki jih objavlja. Med analizo, ki je vključevala razvrščanje člankov po temah in pomenskih sklopih ter kodiranje te vsebine, je poskušal odgovoriti na tri raziskovalna vprašanja, ki si jih je zastavil na začetku.

3 Rezultati

3.1 COVID-19, mesta in gospodarski razvoj (mest) (1. raziskovalno vprašanje)

14. marca 2020 je revija poročala o širjenju mest duhov (*The Economist*, 2020o). To so bila mesta, v katerih je umrlo veliko ljudi in so se gospodarske dejavnosti ustavile (*The Economist*, 2020k, 2020l), vse skupaj pa je povzročalo krizo v duševnem zdravju, žalost, depresijo in travme (*The Economist*, 2020f). Afriška mesta so se spopadala s še posebej velikimi izzivi (Asante in Mills, 2020; *The Economist*, 2020d). Po podatkih afriškega centra za preprečevanje in nadzor bolezni (Africa CDC, 2020c: 1) je do 9. ure 27. oktobra 2020 za posledicami okužbe s koronavirusom umrlo skupno 41.623 ljudi. Smrtnost je bila samo 2,4-odstotna, ta stopnja je bila nižja od svetovne smrtnosti, ki je znašala 2,7 %, pri čemer so nekatere afriške države v tem času poročale o precej višji smrtnosti (Čad: 6,7 %, Sudan: 6,1 %, Liberija: 5,8 % in Egipt: 5,8 %).

Čeprav so navedeni podatki šele nakazovali resnost razmer, je bil vpliv pandemije na gospodarstvo neizpodbiten. V večini



Slika 1: Upad poročanja o pandemiji COVID-19 v reviji, 2020–2021 (ilustracija: avtor)

afriških držav je rast realnega bruto domačega proizvoda v proučevanem obdobju strmo upadla, ob tem je izstopala močna rast cen življenjskih potrebščin in primanjkljaja v proračunu. Finančni primanjkljaj je leta 2020 za celotno Afriko znašal 100 milijard USD (*The Economist*, 2020c). V nekaterih državah, npr. Južni Afriki, se je proračunski primanjkljaj v tem času celo več kot podvojil (*The Economist*, 2020g).

Poročanje o pandemiji v Afriki se je v reviji prepletalo s širšo analizo razmer po vsem svetu. Kot je razvidno iz preglednice 1, je bilo v reviji veliko novic o pandemiji COVID-19, ki so bile objavljene v vseh rubrikah. Število člankov o pandemiji COVID-19 je nato leta 2021 močno upadlo (slika 1).

Kljub vsemu so bili v reviji med januarjem in decembrom 2021 objavljeni članki o pandemiji, vključno s posebnimi poročili o Afriki (glej sliko 1). Čeprav je delež tovrstnih novic leta 2021 znašal samo dobro tretjino novic na to temo, objavljenih v letu 2020, so v reviji še vedno precej obsežno poročali o pandemiji COVID-19. Tudi v širšem medijskem prostoru je revija *The Economist* še posebej primerna za analizo, saj je po poročanju o navedeni temi močno preseгла druge vodilne časopise in revije. To je bilo analizirano tudi v reviji (*The Economist*, 2021c), in sicer v članku z naslovom *The biggest story ever?*

(Največja zgodba vseh časov?), v katerem je bilo navedeno, da je delež člankov o vojni v letih 1915 in 1941 v reviji znašal 53 % oziroma 54 %, v časopisu *New York Times* pa sta deleža v letih 1918 in 1942 znašala 39 % oziroma 37 %. Če so se torej drugi časopisi po svetu po deležu člankov o obeh svetovnih vojnah prej približevali 35 % kot pa 55 %, je poročanje o pandemiji COVID-19 v reviji *The Economist* zagotovo postavilo nov svetovni rekord.

Članki, ki so se osredotočali na Afriko, so bili objavljeni v rubriki *Middle East & Africa*. Med letoma 2020 in 2021 je bilo o pandemiji COVID-19 v Afriki objavljenih okoli 30 člankov, Afrika pa je bila omenjena tudi v drugih rubrikah. V preglednici 2 je navedenih nekaj naslovov člankov o pandemiji, ki so se nanašali neposredno na Afriko. V primerjavi s skupnim številom več kot 500 člankov o pandemiji, objavljenih v reviji, se število člankov o Afriki mora zdi majhno, še vedno pa več kot zadošča za analizo tega, kako so bila v reviji obravnavana afriška mestna gospodarstva.

Na splošno so bile obravnave afriških mestnih gospodarstev v reviji pomanjkljive in zavajajoče. Večinoma so se osredotočale na analizo gospodarstev, ki temeljijo na naravnih virih, neformalno ekonomijo in slume, pri čemer so izpostavljale troje.

Prvič, pandemijo je spremljal padec cen nafte, kar je številne ljudi potisnilo v skrajno revščino. V članku z naslovom *Africa and covid-19: At the end of the line* (Afrika in COVID-19: na repu vrste) (preglednica 2) je bilo izpostavljeno, da surovine v večini afriških držav zajemajo vsaj 80 % izvoza, zato so nižje cene velik udarec. Poleg tega naj bi v mestih prevladovala neformalna ekonomija. V članku z naslovom *Poverty: Rich slum, poor slum* (Revščina: bogati slum, revni slum) (*The Economist*, 2021a) je bilo navedeno, da večina najrevnejših prebivalcev slumov živi v revnih državah, kjer se običajno ukvarja z delom na črno (npr. prodajo prigrizkov na ulicah). V revnih državah je kakršna koli pomoč zanje zelo omejena. V Nairobiju so zaradi preprečevanja širjenja koronavirusa uvedli policijsko uro, tiste, ki so jo prekršili, da so z delom lahko preživeli, pa je policija pretepla. Podobno je bilo izpostavljeno tudi v članku *States of emergency: stay home or be whipped* (Izredne razmere: ostanite doma ali pa vas prebičajo) (*The Economist*, 2020r). V reviji je dosledno poudarjena razlika med formalno in neformalno ekonomijo. V enem izmed člankov je bilo na primer navedeno, da bodo omejitve gibanja in prodaje še zlasti prizadele delavce v neformalni ekonomiji, tj. večino afriške delovne sile. V Afriki naj približno 85 % delavcev ne bi prejelo redne plače (*The Economist*, 2020j).

Kot je razvidno iz preglednice 2, so bile analize mestnih gospodarstev pomanjkljive. Poudarek je bil na državnih ali regionalnih razmerah, kakršni koli poskusi analize mestnih gospodarstev pa so temeljili predvsem na ekonomskih načelih pomanjkanja in mehanizma, dveh ključnih značilnostih prevladujoče usmeritve v urbani ekonomiji (Commons, 1924: 1–10; Darity, 2023). Kot je bilo poudarjeno v članku *Covid-19 in Africa: Third time unlucky* (COVID-19 v Afriki: že tretjič brez sreče) (*The Economist* 2021c), je bil glavni razlog za hude razmere med pandemijo preprost: pomanjkanje ponudbe cepiv, analiza v članku pa se je osredotočala na število ljudi in zdravstvenih ustanov ter starost Afričanov. Tudi članka z naslovom *Health care in Africa* (Zdravstvena oskrba v Afriki) in *Covid-19 in Africa: The long game* (COVID-19 v Afriki: dolga igra) (preglednica 2) sta se ukvarjala s podobnim vprašanjem. Načelo pomanjkanja se je po drugi strani obravnavalo tudi z vidika povpraševanja. Članka z naslovom *Covid-19 in Africa in Doses of scepticism* (Odmerki skepticizma) sta presenetljivo izpostavila, da ponudba ni bila edina težava. Številne afriške države so se zaradi operativnih pomanjkljivosti in majhnega povpraševanja trudile porabiti odmerke cepiva (*The Economist*, 2021b). Zadnji članek se je nanašal na zavračanje cepljenja, vendar je temeljil na obravnavi načela pomanjkanja, ki se je v reviji uporabljalo za analize glede tako ponudbe kot povpraševanja.

Dve izmed posebnih številki revije sta bili namenjeni Afriki (tj. izdaja z naslovom *Africa's long Covid: The toll on growth*, 2021)

Preglednica 2: Primeri člankov o pandemiji COVID-19 v reviji *The Economist*, ki so se nanašali neposredno na Afriko, 2020–2021

| Naslov članka | Datum objave |
|---|--------------|
| <i>Covid-19 in Africa: Doses of scepticism</i> | 24. 4. 2021 |
| <i>Poaching: Unhappy hunting grounds</i> | 3. 4. 2021 |
| <i>Vaccine manufacturing in Africa: Home brewing</i> | 8. 5. 2021 |
| <i>Democratic Immunity: Of coups and covid jabs</i> | 14. 8. 2021 |
| <i>Covid-19 in Africa: Third time unlucky</i> | 3. 7. 2021 |
| <i>Health care in Africa: Picking their slots</i> | 27. 11. 2021 |
| <i>The Omicron variant: Omicron-aggressions</i> | 4. 12. 2021 |
| <i>Poverty: Rich slum, poor slum</i> | 19. 6. 2021 |
| <i>States of emergency: Stay home or be whipped</i> | 4. 4. 2021 |
| <i>Covid-19 in Africa: The long game</i> | 16. 5. 2020 |
| <i>Egypt's economy: Riders wanted</i> | 23. 5. 2020 |
| <i>Food distribution: The race to feed Africa</i> | 2. 5. 2020 |
| <i>Debt relief: Thanks, but no</i> | 6. 6. 2020 |
| <i>Covid-19 in Africa: Testing times</i> | 20. 4. 2020 |
| <i>South Africa: Measuring the poverty pandemic</i> | 18. 7. 2020 |
| <i>Coronavirus in Africa: Not immune</i> | 28. 3. 2020 |
| <i>Africa and covid-19: At the end of the line</i> | 6. 2. 2021 |
| <i>The pandemic in Africa: One million and not counting</i> | 8. 8. 2020 |
| <i>South Africa and the IMF: Fund facts</i> | 1. 8. 2020 |
| <i>Africa: Leaders and misleaders</i> | 2. 5. 2020 |
| <i>Benin: Voodoo v virus</i> | 9. 5. 2020 |
| <i>Fiscal ill-health: Debt and disease</i> | 11. 4. 2020 |

Vir: avtor

in državam v razvoju (tj. izdaja z naslovom *COVID-19 in the emerging world*, 2020), ki pa nista vsebovali veliko analiz s področja urbane ekonomije. V prvi je bil v enem izmed člankov z naslovom *Economic analysis* (Ekonomska analiza) poudarek na celinah, državah in svetu, Afrika pa je bila omenjena zlasti v povezavi z gospodarstvom, ki temelji na naravnih virih. V posebni številki iz leta 2020 pa so bila mesta samo bežno omenjena pri analizi slumov.

Raziskave afriških mestnih gospodarstev, ki temeljijo na naravnih virih (npr. Obeng-Odoom, 2014), pa kažejo, da se v večini primerov nepričakovani dobički, povezani s prodajo naravnih virov, kopičijo v rokah peščice ljudi. Največ prihodkov od prodaje nafte imajo pogosto mednarodne naftne korporacije in t. i. odsotni lastniki. Nenaden padec teh dobičkov, opisan v reviji *The Economist*, torej boli, prav tako lahko boli tudi njihova nenadna rast. V nasprotju z navedbami v reviji, da ob »oseki nasedejo vse ladje«, je padec cen nepremičnin kot posledica upada prihodkov od prodaje naravnih virov za marginalizirane prebivalce mest, katerih gospodarstvo je odvisno od te prodaje, lahko ugodno. V reviji je poleg tega mogoče prebrati

napačno sklepanje, da je treba neformalno ekonomijo ločevati od slumov in da ljudje ne delajo tam, kjer živijo. Za nekatere to res velja, za večino pa ne. Na splošno velja, da so slumi in neformalna ekonomija v Afriki med seboj prepleteni (npr. Hart, 1971; Obeng-Odoom, 2011). Veliko ljudi v slumih dela od doma, neformalni delavci v mestih pa pogosto prejemajo tudi plačo v okviru formalne zaposlitve.

To pomanjkanje pomenskih odtenkov in kompleksnosti je opazno v več člankih v reviji. Velik poudarek je na trditvi, da se v slumih širijo bolezni. V članku *Poverty: Rich slum, poor slum* je na primer večkrat omenjen slum Kibera v Nairobiju, v članku z naslovom *Coronavirus in Africa: Not Immune* (Koronavirus v Afriki: ni imunosti) (*The Economist*, 2020j; preglednica 2) pa so omenjeni Soweto in Alexandra (sluma v Johannesburgu) ter Makoko (slum v Lagosu). Ni res, da večina stanovanjskih zgradb v Afriki propada in da so prenatrpane, saj je v mestih precej ograjenih stanovanjskih naselij, število katerih stalno narašča. To je značilno zlasti za Lagos (Uduku, 2010), raziskave (Grant, 2009; Obeng-Odoom, 2014, 2018; Ehwi in Morrison, 2022) pa kažejo, da je čedalje več tovrstnih naselij tudi v Akri in Sekondi-Takoradiju v Gani. Poleg tega so značilne različne oblike družinskih hiš ali domačij in stanovanj, ki se oddajajo v najem (glej npr. Tipple idr., 1997; UN-HABITAT, 2009). Dejstvo, da se v reviji večinoma osredotočajo samo na slume, kaže na pristranskost.

V člankih so bolj objektivni glede poročanja o upadu izvoza nafte. Cena surove nafte brent, ki običajno dobro kaže razmere na trgu, je znašala 40 USD na sod, kar je precej manj od 100 USD, ki po navadi nakazuje bolj optimističen trg. Cene naj bi ostale enake v letu 2021 in tudi če bi se zvišale, najverjetneje vse do leta 2050 ne bi presegle vrednosti 55 USD na sod. Podobno je bilo s cenami zemeljskega plina: povprečna referenčna cena Henry Hub je s 4 USD padla na 2,90 USD na milijon britanskih termalnih enot (*The Economist*, 2020g). Nigerijsko gospodarstvo, ki je močno odvisno od nafte, naj bi se leta 2020 skrčilo za 3,2 % (*The Economist*, 2020a). Poznal se je tudi vpliv na dohodek na prebivalca: v Alžiriji, kjer je leta 2012 znašal 5.600 USD, je leta 2020 padel pod 4.000 USD (*The Economist*, 2020g). Raziskave, predstavljene v reviji *The Economist* (npr. 2020i), so pokazale, da se je okrog 80 % prebivalcem Kenije dohodek znižal že aprila 2020).

V preteklosti so gospodarsko recesijo blažila denarna nakazila iz tujine, v proučevanem obdobju pa so skoraj usahnila (*The Economist*, 2020b). Britansko podjetje, ki se ukvarja s tovrstnimi nakazili, je na primer zaznalo 80-odstotni upad nakazil v Vzhodno Afriko, podobno italijansko podjetje pa 90-odstotni upad nakazil v Afriko. Po podatkih Nigerijske centralne banke so se denarna nakazila, ki so prej zajemala 6 % nigerijskega BDP, že februarja 2020 skrčila na 3 % (*The Economist*, 2020h).

V Kampali je bil na primer opazen upad mednarodnih in notranjih nakazil, saj so jih težko pošiljali tako ljudje, ki so se izselili v tujino, kot tisti, ki so se preselili s podeželja v mesto (*The Economist*, 2020h).

Družbenoekonomska in zdravstvena kriza je imela neenakomerne družbeno-prostorske posledice, kar je bilo navedeno tudi v reviji. Na splošno so bile najbolj prizadete ekonomsko najranljivejše skupine. Z zdravstvenimi težavami so se spopadali tudi nekateri premožni politiki, največje težave na zdravstvenem, gospodarskem in socialnem področju pa so imeli zlasti migranti, mestni prebivalci, ki živijo iz rok v usta, pripadniki rasnih in etničnih manjšin, ženske, berači in invalidi. V Južni Afriki je bilo med tistimi, ki so med februarjem in aprilom 2020 izgubili službo, 66,7 % žensk (zlasti temnopoltih). V istem obdobju je bila za fizične delavce v Južni Afriki verjetnost, da bodo izgubili službo, trikrat večja kot za pisarniške delavce (*The Economist*, 2020g). Navedene težave imajo širše prostorske, družbene in ekološke posledice. Nekateri posamezniki, ki so med veljavnostjo ukrepov omejevanja gibanja izgubili službo v Akri na jugu Gane, so se vrnil v severno Gano, drugi so se iz mest preselili na podeželje. V Južni Afriki se je med februarjem in aprilom 2020 na podeželje preselilo vsaj 5 do 6 milijonov ljudi, kar je dodatno obremenilo gospodarstvo podeželskih območij (*The Economist*, 2020g).

Mnoge zgodbe, predstavljene v reviji, so bile poučne, a so se nanašale predvsem na posamezne države ali regije, ne mesta. Za boljše razumevanje afriškega gospodarstva pa je poleg nacionalnih, celinskih, regionalnih in svetovnih ključno upoštevati tudi mestne vidike. Dober primer so denarna nakazila. Raziskave mest (Obeng-Odoom, 2022a: 212–249) kažejo, da denarna nakazila, ki jih migranti pošiljajo domov za gradnjo hiše, upadajo in rastejo. Afriški migranti na primer nakazila povečajo ali zmanjšajo glede na nihanje menjalnih tečajev. Ker se taka denarna nakazila zgoščajo v nekaterih mestih, so precejšnje razlike v porazdelitvi nakazil na ravni mest in regij (Obeng-Odoom, 2022a: 212–249). Druge raziskave (npr. Ampah, 2023) po drugi strani kažejo, da denarna nakazila iz afriških mest podpirajo tudi mestno življenje na globalnem severu, kar pomeni, da članki v reviji *The Economist* (spet) napačno razumejo afriška mestna gospodarstva.

3.2 Gospodarsko okrevanje (mest) (2. in 3. raziskovalno vprašanje)

Pristop k obravnavi gospodarskega okrevanja (mest) v *The Economistu* se ujema s splošno metodologijo revije, ki nameinja malo pozornosti afriškim mestom in podpira spodbujanje gospodarske rasti za vsako ceno (ang. *growthism*) (glej npr. *The Economist*, 2020h, 2020m, 2020r). Priporočila v reviji so

se tako nanašala predvsem na denarno, davčno in socialno politiko, dobrodelnost (pomoč v obliki gotovine, cepiv, testov itd.) in poceni posojila Mednarodnega denarnega sklada in Svetovne banke.

Ta pristop je v reviji razumljen kot sinteza najboljših znanstvenih izsledkov o tem, kako bi bilo treba reševati krizo, povezano s pandemijo COVID-19 v mestih (*The Economist*, 2020s). Kot ugotavlja Harjuniemi (2019: 494), je v reviji navedeno, da je pristop postpolitičen, naraven in sodoben. Navedeno trditev moramo vsaj z vidika vsebinske širine jemati resno in ker se v reviji obravnavajo zelo raznovrstne gospodarske in zdravstvene teme (za analizo drugih področij glej *The Economist*, 2020i, 2020m), je pomembno, kako se je o njih poročalo. V nekaterih člankih se je na primer omenjal pojem gospodarskega zdravila (*The Economist*, 2020n, 2020o), ki se osredotoča na rast, izvozno usmerjeno rast in formalno gospodarstvo kot eden izmed polov rasti (*The Economist*, 2020c), upoštevati pa ga je treba skupaj z denarnimi in davčnimi ukrepi.

Med priporočili je bilo v *The Economistu* omenjeno tudi tiskanje denarja za nakup obveznic, kar bi ohranjalo zaupanje vlagateljev in cene na borzah (*The Economist*, 2020j). Poleg tega bi bilo treba manj obdavčiti uradno registrirana podjetja, saj bi to znižalo njihove transakcijske stroške. Vlade bi morale več sredstev porabljati na primeren način (*The Economist*, 2020o; Curr, 2020, 14), ki bi zagotavljal, da »pandemična vlada« (*The Economist*, 2020j) ali »koronoptikum« (*The Economist*, 2020j) obstajata samo začasno in zato, da spodbudita vrnitev h gospodarstvu, ki temelji na izvozu. Vseeno bi bilo treba kmalu znova uvesti varčevalne ukrepe (*The Economist*, 2020c, 2020q) in s tem preusmeriti pozornost ekonomske politike od Keynesove politične ekonomije k ekonomiji Milтона Friedmana (*The Economist*, 2020q). Eden izmed avtorjev v rubriki *Leaders* meni, da bi bila prava rešitev ponovna uvedba kapitalizma prostega trga (Curr, 2020, 14).

Tudi v povezavi z zdravstveno politiko so v *The Economistu* pravzaprav zagovarjali predvsem obnovo gospodarske rasti. Glavna domneva v reviji je bila, da celotno zdravstveno oskrbo zagotavlja zdravstveni sistem, katerega glavna vloga je podpirati gospodarsko rast, ki temelji na prostem trgu. Kot je bilo navedeno v enem izmed člankov (*The Economist*, 2020d), po navadi afriški zdravstveni sistemi postanejo preobremenjeni prej kot tisti v Aziji in Evropi, saj imajo velik kadrovski in finančni primanjkljaj.

Predlogi za reševanje zdravstvene krize v mestih so bili precej preprosti in jasni (*The Economist*, 2020n). Cilj je bil vzpostaviti samozadostno gospodarstvo, v katerem bi bili med podjetniki znanstveniki, strokovnjaki s področja medicine in človekoljubi (*The Economist*, 2020j, 2020p; Curr, 2020; za primere v zvezi

s cepivi glej tudi *The Economist*, 2020h, 2020j, 2020o, 2020v, 2020w).

Na povabilo odgovornih pri reviji je prispevek o pandemiji napisal tudi poslovnež Bill Gates, ki je nakazal, da imata v prevladujočih analizah s področja urbane ekonomije mesto tudi že omenjeno ekonomsko načelo pomanjkanja in s tem človekoljubje. Po njegovem mnenju bo človeštvo pandemijo premagalo šele, ko bo večina prebivalcev precepljenih (Gates, 2020, 69). *The Economist* je pod drugi strani izpostavil pomen ekonomskih načel pomanjkanja in zasebne lastnine pri upravljanju mest (*The Economist*, 2020m). Ta lahko skromne vire na primer učinkoviteje upravljajo tako, da privatizirajo mestna zemljišča, saj to zagotavlja njihovo bolj trajnostno in preudarno rabo. Pandemija COVID-19 je izpostavila škodo, ki jo povzročajo negotove lastninske pravice, saj je čedalje več primerov prisilnih izselitev in prilasčanja zemlje. Afrika bi zato bolj kot kdaj koli potrebovala reforme, ki bi spodbujale gospodarsko rast (*The Economist*, 2020u).

V *The Economistu* je bilo ideološko sledenje ekonomskima načeloma pomanjkanja in zasebne lastnine dopolnjeno s subtilnim zagovarjanjem nekoliko močnejše socialne politike med pandemijo, pri čemer so bili predstavljeni primeri socialnih ukrepov. Kenijska vlada je na primer sprejela pobudo za začasno zaposlitev več kot 26.000 mladih med pandemijo (*The Economist*, 2020c), v Tuniziji in Kongu pa je vlada revnim nakazala manjšo denarno pomoč, da bi ohranila gospodarsko rast (*The Economist*, 2020c). Vlada v Kongu je tako med dva milijona ljudi v Kinšasi in drugje razdelila 50 milijonov USD. Vsak posameznik je prejel samo 25 USD, kar je bilo v primerjavi s povprečno denarno pomočjo v bogatejših državah, kot so Združeno kraljestvo, Francija in ZDA, kjer je znašala 695 USD, zelo malo (*The Economist*, 2020c). Vlada v Južni Afriki je izplačala socialno podporo okoli 600.000 posameznikom, pri čemer je bilo število upravičencev precej manjše od 15 milijonov ljudi, ki so dejansko potrebovali socialno pomoč (*The Economist*, 2020g). Južnoafriška vlada je poleg tega obljubila davčne olajšave zasebnim podjetjem, če obdržijo delavce in jih še naprej plačujejo. Južnoafriška centralna banka jim je ponudila tudi posojila (*The Economist*, 2020j), da bi jim olajšala poslovanje, ta ukrep bi lahko še razširili.

Sejšelska vlada je zaposlenim v zasebnem sektorju zajamčila izplačilo plač za naslednje tri mesece (*The Economist*, 2020j), za več pa ne. Programi s področja socialnega varstva so bili v Afriki uvedeni samo v Južni Afriki in Keniji (*The Economist*, 2020j). Egipčanska vlada je neformalno zaposlenim ponudila skromno denarno pomoč v višini tretjine njihovega povprečnega tedenskega dohodka pred pandemijo in še to samo za tri mesece (*Economist*, 2020i). Poleg tega je uvedla enoodstotni koronski davek, ki naj bi se stekal v program denarne pomoči,

ki pa je dosegel samo 10 % prebivalstva. Egipčanska centralna banka je namenila 3,2 milijarde USD za ugodna posojila turističnim agencijam, ki pa bi jih te morale odplačati v dveh letih (*Economist*, 2020i). Vsebina člankov, v katerih so avtorji poročali o vsem tem, je bila poučna, ni pa se nanašala na urbano ekonomijo niti avtorji niso obravnavali kompleksnosti afriških mestnih gospodarstev ali mest na splošno.

4 Razprava: napačna diagnoza, napačno zdravilo

Analize mestnih gospodarstev so nujne že same po sebi, hkrati pa so pomembne za boljše razumevanje gospodarstva podeželskih območij, posameznih regij, držav in celotnega sveta. Mestna gospodarstva niso samo odsev državnega gospodarstva, zato je tvegano o njih nekaj sklepati samo na podlagi analize državnega gospodarstva. Čeprav je mestno gospodarstvo v Afriki povezano z državnim (npr. Njoh, 2003; Obeng-Odoom, 2010; Ahimah-Agyakwah idr., 2022), ga je treba empirično proučevati (Obeng-Odoom, 2014), pri čemer raziskave ne smejo temeljiti na predvidevanjih ali domnevah, ki izhajajo iz izsledkov glede državnega ali regionalnega gospodarstva.

Ker so gospodarstva afriških držav urbanizirana, so ključna naslednja vprašanja: Koliko so ekonomske analize odsevale močno urbanizirana afriška gospodarstva? Ali so ekonomisti pozornost namenili tudi mestnim gospodarstvom v Afriki? Kako podrobno so jih analizirali? Ali predlagane ekonomske politike izražajo realnost mestnih gospodarstev v Afriki? Vsebinska analiza okoli 500 člankov v *The Economistu* je dala presenetljive rezultate. Obravnava te tematike v reviji je zelo obsežna, ni pa izčrpna. Ekonomske analize so večinoma omejene na državno raven, brez sistematičnega obravnavanja mestnih ali regionalnih vidikov. Močnejše poudarjanje težav, povezanih z gospodarsko rastjo, kot pa bolj perečih vprašanj, povezanih z mestnimi neenakostmi in družbeno razslojenostjo, je opazno tako z metodološkega kot ideološkega vidika, ne temelji pa na sistematičnih in empiričnih raziskavah.

Redki primeri analiz mest, objavljenih v reviji, imajo metodološke temelje v prevladujoči usmeritvi urbane ekonomije z nekaterimi dvojnimi pogledi o naravi afriških mestnih gospodarstev ter poudarkom na rasti in ekonomskem načelu pomanjkanja. Pristop, uporabljen v reviji, je pomanjkljiv zaradi prostorskega separatizma (Gore, 1984/2012), delno tudi zaradi časovne kratkovidnosti (Santos, 1979/2018: 12), ki je posledica omejene zgodovinske analize ekonomike naravnih virov, zlasti pa zaradi omejenega upoštevanja prostorsko-časovne dinamike gospodarskega razvoja v Afriki. Napačno razumevanje dejanskih razmer v reviji ni samo izraz nepoznavanja, ampak tudi

izraz ideoloških prostorskih interesov. Navedeno je posledica zahodne modernistične ideološke pristranskosti (Obeng-Odoom, 2022b), iz katere izhajajo tri strukturne omejitve. Prvič, poudarek na rasti na celini, kjer so večja težava množična družbena razslojenost in neenakosti v mestih (Obeng-Odoom, 2020a, 2020b), kaže na neujemanje med gospodarskim zdravilom in resnično boleznijo.

Drugič, čeprav so afriška mestna gospodarstva vključena v svetovno gospodarstvo, se razlikujejo med seboj in od drugih mestnih gospodarstev po svetu. Prevladujoča neformalna ekonomija je temelj mestnih gospodarstev, vendar lokalna organizirana delavska združenja slabo razumejo delovne razmere ranljivih delavcev. Podjetja so mešanica srednje velikih profitnih organizacij in socialnih podjetij, ki imajo omejen nadzor nad tehnologijo, ki jo uporabljajo (Grant, 2009; Murphy in Carmody, 2015, 2019; Yeboah idr., 2022). Ta neenotna družbeno-prostorska razmerja se kažejo tudi v razmerjih med glavnimi mesti in regionalnimi prestolnicami (Dickson, 1993). Z mednarodnega vidika se zdi, da afriška mestna gospodarstva zadovoljujejo potrebe t. i. globalnih mest, za katera je značilna bogatejša, a zgoščena formalna ekonomija, v kateri prevladujejo mednarodne korporacije. Po drugi strani so v Afriki tudi večja in bolj profesionalizirana podjetja, katerih glavni cilj je izveliči čim več prihodkov iz prevladujoče, a šibkejše neformalne ekonomije (Grant 2009). Bolj izvozno usmerjena gospodarska rast bi torej še povečala družbene neenakosti in s tem revščino (Fosu in Gafa, 2020).

Tretjič, osredotočanje na uradno registrirana podjetja kot enega izmed polov rasti celotnega gospodarstva kaže nerazumevanje narave odnosov med formalno in neformalno ekonomijo v Afriki. Sistematične raziskave (Peil, 1972: 23–40; Santos, 1979/2018; Bryceson in Potts, 2006; Songsore, 2011; Ablo, 2015, 2020) kažejo, da je večina zasebnih podjetij, ki delujejo v okviru formalne ekonomije, usmerjena v izvoz, pri čemer stroške dela znižujejo s prekarnimi delavci. Večina formalnih podjetij, ki se ukvarjajo s prodajo naravnih virov, je v tuji lasti, usmerjena so v ustvarjanje dobička in delujejo na območjih največjih urbanih aglomeracij. Ta podjetja obvladujejo mestno gospodarstvo, ohranjajo razlike med domačimi in tujimi podjetji v mestih, ustvarjajo delavsko aristokracijo (Grant, 2009; Murphy in Carmody, 2015; 2019; Yeboah idr., 2022) in v glavnem odgovarjajo razredu odsotnih lastnikov, kot jih je poimenoval Veblen (1923/1997). V mnogih izmed teh podjetij, ki imajo oligopolen položaj, delavci ne morejo skleniti rednega delovnega razmerja, po navadi se ne smejo združevati v sindikate, poleg tega morajo delati v zelo slabih razmerah. Obseg neformalne ekonomije se je z rastjo formalne ekonomije resda skrčil, a je večina novih malih lokalnih podjetij odvisna od formalne ekonomije, ki jo obvladujejo odsotni lastniki.

5 Sklep

Ali se lahko načela prevladujoče usmeritve v urbani ekonomiji uporabijo tudi v raziskavah globalnega juga, je pomembno vprašanje, ki pa ga je treba poleg obravnav v akademskih razpravah proučiti tudi empirično. Obširna obravnava pandemije COVID-19 v reviji *The Economist* je dobra podlaga za iskanje odgovorov na naslednja vprašanja: Ali so ekonomisti pozornosti namenjali tudi mestnim gospodarstvom v Afriki? Kako podrobno so jih analizirali? Ali predlagane ekonomske politike izražajo splošne značilnosti in posebnosti mestnih gospodarstev v Afriki? Vsebinska analiza novic v *The Economistu* je pokazala, da v reviji niso namenjali veliko pozornosti afriškim mestnim gospodarstvom in da je poročanje z vidika prevladujoče usmeritve urbane ekonomije, ki v njej prevladuje, zelo problematično. Navedeni izsledki so presenetljivi. Liberalizem še ne pomeni, da bi morale biti analize s področja urbane ekonomije pristranske, kar pa je glavna značilnost njene trenutno prevladujoče usmeritve. Omejitve prevladujoče urbane ekonomije so v literaturi dobro predstavljene (npr. Stilwell, 1995; Zhang, 2015; Munro, 2022), njihova razsežnost v *The Economistu* pa je presenetljiva.

Za mestna gospodarstva na globalnem jugu je potrebna nadaljnja analiza. Načeloma je za osvetlitev njihove narave potrebna uporaba metod urbane ekonomije. Pri tem je problem njena prevladujoča usmeritev, ki se preveč ukvarja s prostorskim ravnovesjem in optimizacijo gospodarstva (Zhang, 2015: xvii), kar se kaže v tem, da v ospredje postavlja rast, načelo pomanjkanja in kopičenje kapitala. Zato so potrebni novi pristopi k proučevanju mestnih gospodarstev in gospodarstva na globalnem jugu.

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UDK: 711.4-122(238.1)

doi:10.5379/urbani-izziv-2023-34-01-05

Prejeto: 23. 3. 2023

Sprejeto: 29. 5. 2023

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Soobstoj oblikovanja, regulativnega okvira in pogajanj na področju urbanističnega načrtovanja: primer Buenos Airesa, Ciudadada de México, in São Paula

V strokovni literaturi se pogosto poudarja, da urbanistična kompleksnost temelji na soobstoju naslednjih treh prvin: regulativnega okvira, ravni urbanističnega oblikovanja in pogajanj med akterji. Avtorji se v članku z navedenim strinjajo, hkrati pa zavračajo zamisel, da so lahko te prvine v idealnem ravnovesju, brez negativnih medsebojnih vplivov. Proučevali so, kje so meje njihovega soobstajanja, in postavili hipotezo, da idealen in uravnotežen soobstoj teh prvin ni mogoč. Njihova raziskava je temeljila na naslednjih štirih glavnih in zaporednih aktivnostih: 1. pregledu literature o temeljih sodobnega

urbanističnega načrtovanja, 2. kritični kvalitativni analizi glavnih dokumentov, ki vsebujejo urbanistične direktive in se uporabljajo v treh največjih mestih Latinske Amerike: Buenos Airesu, Ciudadu de México in São Paulu (s poudarkom na smernicah v teh dokumentih in kako obravnavajo vse tri omenjene prvine), 3. analizi součinkovanja navedenih treh prvin in 4. oblikovanju končnih ugotovitev.

Ključne besede: urbanistične teorije, urbanistični pojmi, urbanistični instrumenti, participativni urbanizem

1 Uvod

Urbanistično teorijo, ki bi bila utemeljena v praksi, je zelo težko oblikovati (Bolan, 2017). Glavni razlog so spremenljivi družbeni odnosi in nenehno nasprotujoči si interesi na mestnih območjih. Pot od načrtovanja do realizacije v praksi je nenehno postavljena pod vprašaj, hkrati pa se pogosto dvomi o uporabnosti urbanističnega načrtovanja. Alfasi in Portugali (2007: 175) na primer dvomita o smislu načrtovanja. Sprašujeta se, ali lahko ponudi rešitev ali pa je samo nekaj, kar morajo geografi kritično raziskati. Intelktualni čar načrtovanja je, da vključuje aktivno preobrazbo in nakazuje natančno izvedbo prvotno načrtovanega. Urbanistično načrtovanje, ki v idealnem primeru vključuje lokalne izvajalce, je od nekdaj izpostavljeno močnim silam zunaj svojih političnih in upravnih mej. V zadnjem času je to zlasti digitalna nadgradnja mest. Graham (2020) opisuje idejo urbanizma platforme, pri katerem digitalno orodje (tj. platforma) ne ustreza nikomur, je preveliko, da bi ga lahko nadzirali, preveč novo, da bi ga lahko urejali s predpisi, in preveč inovativno, da bi ga lahko odpravili.

Friedmann (1998: 250) po drugi strani navaja, da načrtovanje kot praktična dejavnost po svetu nenehno zahteva ponoven premislek. Namesto vključevanja teorije v načrtovanje je treba oblikovati teorijo načrtovanja (Los, 2018). Načrtovalska teorija in praksa nista omejeni na trenutne pojave, ampak se osredotočata na različne možnosti prihodnjih pojavov. Kljub lastnim omejitvam ali neizvedljivosti je samoopravičevanje načrtovalske teorije in prakse zelo mamljivo. Teorija in praksa izmenjujoče se vplivata na urbanistične predpise, urbanistično oblikovanje in pogajanja, zato bi bilo dobro, da sta bolj usklajena.

Avtorji v članku najprej obravnavajo glavne tri prvine urbanističnega načrtovanja in njihov medsebojni vpliv. Urbanistični regulativni okvir na primer obsega vse od splošnih pravil organizacije aktivnosti po vsem mestu ali samo na izbranih območjih do podrobne določitve rabe prostora (Bertaud, 2018). Nanj vplivajo družbeni, gospodarski in okoljski in dejavniki, zaradi česar je pri načrtovanju vedno potrebno ali neizogibno tudi pogajanje. Ko sta zakonsko urejanje in urbanistično oblikovanje izpostavljena širši razpravi v lokalni skupnosti, nanju neizogibno vplivajo tudi načela, zamisli in prevladujoči pogledi v teoretičnih delih. Čeprav se oblikovanje fizičnih prvin javnih prostorov pogosto dojema kot sopomenka za konkretne posege, je pravzaprav uresničitev dolgih predhodnih teoretičnih razmislekov, ki se bolj kot na produktni razvoj osredotočajo na načela, prednostne naloge, zgodovinske dejavnike, vsiljene kulturne prvine in podobno.

Skepticizem avtorjev o popolnem ravnovesju stališč v urbanizmu se med drugim sklada s ponavljajočimi se razpravami o pojmu trajnosti. Vogt in Weber (2019) poudarjata, da je zelo težko popolnoma uravnovesiti okoljske, družbene in gospodarske interese ali omejitve. Podobno Pengjun in Peilin (2017) v razpravi o zdravju v mestih kritizirata splošno sprejeto zamisel, da lahko gosta ali strnjena zazidava zmanjša emisije toplogrednih plinov. Čudežne rešitve ali idealne univerzalne formule, v katero bi lahko neomajno verjeli, torej ni. Za pragmatične namene, na primer za izdelavo načrtov in programov ter pogajanja med akterji v zvezi z upravljanjem mest, imajo univerzalni in uravnoteženi dejavniki pomembno vlogo in lahko usmerjajo delovanje. To, da brezpogojno verjamemo v regulativne okvire, oblikovanje in pogajanja, je konceptualno šibko, dejansko pa je nujno – v smislu utopičnih zamisli, ki nas ženejo naprej.

Avtorji v članku razpravljajo o glavnih prvinah urbanističnega načrtovanja (tj. regulativnem okviru, oblikovanju in pogajanjih), na podlagi česar oblikujejo teoretični okvir članka. Te prvine se nenehno predstavljajo kot nujna orodja, ki jih lahko uporabljamo hkrati in brez negativnih medsebojnih vplivov, avtorji pa analizirajo meje njihovega soobstoja. Njihova hipoteza je, da idealen in uravnotežen soobstoje teh prvin ni mogoč. Članek je razdeljen v tri glavna poglavja z naslovi Tri prvine urbanističnega načrtovanja, Trije primeri iz Latinske Amerike in Dileme soobstoja: pogajanje v središču načrtovanja; tem sledita še razprava in sklep.

Proučevane prvine imajo lahko same zase pomembno vlogo, ko pa jih združimo, so med seboj v nenehnem konfliktu. Avtorji so navedeno ponazorili na primeru treh mest: Buenos Airesa, Ciudad de México in São Paula. V razpravi povzamejo glavne izsledke analize, v sklepu pa se poskušajo izogniti kakršnim koli pristopom, ki bi onemogočili nadaljnje teoretične razprave o (tradicionalnih in inovativnih) orodjih, s katerimi poskušajo urbanisti pozitivno spremeniti mesta.

2 Tri prvine urbanističnega načrtovanja

Opredelevanje prvin, tj. oblikovanja, regulativnega okvira in pogajanj, kot bistvenih za urbanistično načrtovanje se morda zdi domišljavo in tvegano, saj tudi drugi dejavniki vplivajo na to, kako se izvaja, kako bi se lahko izvajalo in kako uspešno bo. Vseeno se te tri prvine v sodobni literaturi s področja urbanizma pogosto omenjajo v zvezi z analizami mest ali tehničnih in pravnih dokumentov o urbanističnih zadevah. To poglavje se osredotoča na medsebojno vplivanje omenjenih prvin. Kot je razvidno iz izsledkov, lahko ti vplivi vključujejo vse od zaželenega in idealiziranega ujemanja do tega, da jih nikakor ne moremo vrednotiti enakovredno.

Pomembna vloga navedenih treh prvin je bila na primer že potrjena pri Burnhamovem načrtu za Chicago (Smith, 2006), ki je bil plod načrtnega prizadevanja za spremembo predpisov, oblikovanja in pogajanja. Novost z vidika sodelovanja skupnosti je bila povezana z vladno prakso oblikovanja parametrov coniranja in sprejemanja zakonov o zasebni lastnini (Cheng in Chambliss, 2016). Poleg tega so bile navedene oblikovalske rešitve ključne za to, da se je javnost začela zanimati za zamisli, predstavljene v načrtu, in da se je z njimi strinjala tudi skupnost. Strategija doseganja javne sprejetosti na podlagi oblikovalskih rešitev je bila del načrta (Moody, 1912), kar sta kritično izpostavila tudi Cheng in Chambliss (2016).

Glavna kritika tradicionalnih načrtov rabe prostora ali strogo reguliranih območij, s katerimi se poskuša oblikovati mestno okolje z uvedbo prostorskih in časovnih omejitev, izhaja iz analize trenutnega stanja in uporabe regulativnih metod. Kot ugotavlja Portugali (2008), je glavna slabost načrtov rabe prostora ali preveč strogo reguliranih območij to, da ne upoštevajo mest kot odprtih, kompleksnih in samoorganizirajočih sistemov. V zvezi s tem se zastavlja vprašanje, ali bi načrtovanje lahko še vedno doseglo svoje cilje, če bi v celoti upoštevalo te lastnosti mest. Ali bi lahko načrtovanje še vedno sledilo svojemu glavnemu namenu, če bi upoštevalo vidike, ki postavljajo pod vprašaj njegovo osnovno nalogo, tj. urejanje ljudi in aktivnosti v mestnem prostoru?

Zavedanje nezanesljive narave urbanističnih načrtov in posledično zagovarjanje pasivnega, spontanega razvoja mestnih območij bi v skladu z načeli sistemske dinamike pripeljalo do kaotičnega stanja. Kot razlaga Mashinsky (1990: 93), se kakovost mesta kot kompleksnega sistema s spontanim, pasivnim razvojem neizogibno zmanjšuje. Kot vse regulativne smernice tudi urbanistični načrti vsebujejo mamljivo obljubo, da se bo s popravki pri njihovi izvedbi resničnost uklonila tehničnim nameram. Kot poudarja Portugali (2008), je treba kljub temu prepoznati potrebo po načrtovanju in urejanju urbanih naselij. Savini idr. (2014) opozarjajo, da je treba preseči paradoks med centraliziranim nadzorom in samoorganizacijo ter oblikovati kreativne načine, kako načrtovanje povezati s kompleksnim, interaktivnim, prilagodljivim in samoorganizirajočim sistemom mest. Ti razmisleki nas ne nagovarjajo k zagovarjanju idealne kombinacije glavnih prvin urbanističnega načrtovanja, ampak vsaj k upoštevanju pomena njihovega zapletenega soobstoja.

Trajalo je kar nekaj časa, da so načrtovalci začeli upoštevati politiko kot del načrtovalskega področja in ljudi kot del procesa odločanja. V poznih petdesetih letih 20. stoletja, po več desetletjih modernističnih predpisovalnih načrtov, so v načrtovalski stroki začeli postajati pomembnejši okoljska moralnost, soodvisnost človeka in narave, javno odločanje o obliki mest ter izbira in prilagodljivost posameznih rab (Crane,

1960: 284). Hkrati je Jane Jacobs v načrtovanje (ali upravljanje mesta) pritegnila nestrokovnjake in lokalno skupnost ter s tem uvedla spremembe v ustaljene razprave o oblikovanju politik. V zadnjih desetletjih se zdi, da je participativni pristop tesno povezan z načrtovalskim procesom: stare načrte kritizirajo zaradi neparticipativne narave, sodobni načrtovalci pa poudarjajo, da je v načrtovanje treba vedno vključiti tudi skupnost. Čeprav se zdi paradokсно, te težnje ob hkratnem zanemarjanju strukturne podlage načrtovanja presegajo njegov prvotni in tradicionalni namen, tj. urejanje prostora, ki temelji na tehničnih pristopih in jasni viziji prihodnosti, ki se sčasoma uresniči prek oblikovanja. Zdi se, da se sodobno participativno načrtovanje le redko ukvarja s scenariji za prihodnost in se raje odziva na trenutne potrebe.

Načrtovanje in oblikovanje politik sta tako postala tesno povezana. Povezava je bila vzpostavljena tiho in strateško, in sicer z zanemarjanjem dejstva, da ne glede na vrsto razprave ni samo ene najboljše rešitve ali celo splošne opredelitve družbene pravičnosti, ki bi jo sprejeli vsi deležniki na različnih ravneh. Še zamisel o odločitvah, sprejetih v korist večine, se zdi preveč šibka, če jo primerjamo z dobro namernimi reformami po svetu, ki pa se še vedno končajo z revščino, izkoriščevalskimi procesi, nenehnimi socialnimi krivicami in rabo prostora, ki zagotavlja čim večje dobičke. Politika je že po naravi konfliktna, zato je za to, da se med interesi najdejo skupne točke, ključno pogajanje. Navedeno je obvezno za vsakega akterja v načrtovalskem procesu, ni pa jasno, ali lahko načrtovanje nadomesti dialog in ali je lahko dialog najboljše načrtovalsko orodje. Če je lahko, ali spodkopava prvotne temelje načrtovanja? Čeprav so ti verjetno v nevarnosti, zanje ni lahko najti ustreznega nadomestka: ali ne moremo vzpostaviti novih načel in metod ali pa smo tako močno navezani na stare postopke, da nas kljub njihovim slabim rezultatom načrtovanje še vedno strokovno izpolnjuje. Ob tem ko so v 20. stoletju na oblikovanje, regulativni okvir in pogajanja vplivale tehnične domneve in univerzalne rešitve, je bilo obdobje, ki je sledilo, zaznamovano s precej bolj zapletenimi odnosi med tremi obravnavanimi prvimi, smernicami, ki so bile precej bolj prilagojene lokalnemu okolju, in precej bolj raznolikimi možnostmi povezave med omenjenimi prvimi.

Tretja splošna prvina načrtovalskega procesa je oblikovanje v smislu fizičnih značilnosti mestnih prostorov na različnih ravneh, od javnih površin do stavb in njihove notranjosti. Nekatere ključne značilnosti stavb, kot so odmik od roba ulice, število nadstropij in delež odprtih (netlakovanih) zunanjih površin, so lahko določene že v ureditvenih načrtih. To pomeni, da fizične značilnosti stavb narekujejo urbanistični, arhitekturni in tehnični predpisi. Namen načrtovalskih procesov, ki temeljijo na oblikovanju, je vplivati na odnose med ljudmi ter grajenimi in naravnimi okolji.

Kot odziv na preveč predpisovalne in regulativne načrtovalske procese se v zadnjih desetletjih oblikovanju in pogajanju pripisuje čedalje večji pomen, vseeno pa je jasen in močan regulativni okvir še vedno pomemben. Healeyjeva (2003: 104), ki zagovarja participativno načrtovanje, poudarja, da je regulativna moč še vedno pomembna za varovanje dragocenih okoljskih značilnosti, Innesova (2004) pa opozarja, da lahko regulativni okvir zagotavlja ravnovesje pri pogajanjih med deležniki. Participativno urbanistično oblikovanje so v praksi preizkusili v mnogih bogatih in revnih državah po svetu, tovrstne pobude pa v zadnjem času spodbujajo zlasti zamisli o kolektivnih izkušnjah. Dejstvo, da naj bi zdaj pri oblikovanju sodelovali številni strokovnjaki (ne samo arhitekti, oblikovalci in inženirji), je na prvi pogled odziv na manj centralizirano ali regulativno načrtovanje. Kerrigan (2018) ugotavlja, da kljub množičnemu zagovarjanju tovrstnega sodelovanja to še vedno ni zelo pogosto. To nima smisla glede na čedalje več ljudi, ki so v medsebojni interakciji, nova spletna orodja in nove družbene medije za izmenjavo (povratnih) informacij, širjenje segmentov potrošnikov in strokovnjakov, porast civilnih in neprofitnih partnerstev ter čedalje več lokalnih uprav, ki sodelujejo v načrtovalskih procesih. Na splošno je priznано, da so navedeni dejavniki pomembni, še vedno pa se upoštevajo splošnejše opredelitve, ki izhajajo iz načrtovalskih smernic, ustrezne zakonodaje in mestnih upravljaljskih praks. Te ostajajo nesporne, zaradi česar slabijo participativne in kolektivne aktivnosti. To zagotovo ne pomaga participativnemu procesu, s splošnejšega načrtovalskega vidika pa je to edini način obravnave stvari in ljudi v mestu. Primeri v nadaljevanju lahko to vprašanje bolje osvetlijo.

3 Trije primeri iz Latinske Amerike

Današnja urbanistična načrtovalska praksa v Buenos Airesu izvira iz sredine 19. stoletja in takratnih urbanističnih gibanj v večjih evropskih mestih, kot sta bila Pariz in Barcelona. Takrat so bile predstavljene prve urbanistične teorije (npr. v delih Ildefonsa Cerdàja, Reinharda Baumeisterja, Josepha Stubbena in Raymonda Unwina). Novick (2005) to obdobje obravnava kot izhodišče za proučevanje poznejših urbanističnih načrtov mesta: Novega načrta (1907–1911), pri katerem je oblikovanje mesta temeljilo na mešanici estetike, funkcionalnosti in hierarhije stavb, Organskega projekta komisije za gradbeno estetiko (1923–1925), pri katerem so se že pokazala trenja med urbano umetnostjo in prednostnimi nalogami, ki so temeljila na izsledkih raziskav, in Regulacijski načrt (1932), ki je bil bolj kot sistematičen načrt nekakšna mešanica med sabo nepovezanih projektov.

V poznih dvajsetih letih 20. stoletja je Le Corbusier (2015) v značilnem samozavestnem slogu izjavil, da je Buenos Aires

brezupen kraj, ki ga lahko rešijo samo temeljiti načrtovalski ukrepi. Urbanistični načrt mesta, ki sta ga pod njegovim mentorstvom izdelala argentinska arhitekta Hardoy in Kurchan (1937–1938), je predvideval prostorske posege, ki so temeljili na modernističnih načelih urbane racionalnosti in sektorizacije rabe prostora ter vključevali coniranje, hierarhični sistem javnega prevoza in gradnjo novega poslovnega središča.

Iz te smeri razvoja je razviden premik od pripisovanja prevelike vrednosti oblikovanju pri gradnji novega »evropskega« mesta k sprejemanju ostrejših regulativnih ukrepov in več zakonikov, ki so vzpostavili nadzor nad javnimi in zasebnimi deli. Vse skupaj je bilo torej še zelo daleč od sodelovanja javnosti v načrtovalskem procesu.

Za boljše ponazoritev glavne ideje, predstavljene v tem članku, je treba omeniti pomemben odmik od te smeri razvoja, ki postavlja pod vprašaj pomen velikih načrtov. Corti (2007) omenja zmago postmodernističnega, neoliberalnega in razdrobljenega načina upravljanja mest v devetdesetih letih 20. stoletja, pri čemer so tradicionalni načrti postali še šibkejša načrtovalsko orodje. Kot je bilo navedeno že na začetku članka, urbanistični načrti pogosto razočarajo upravljavce mest, raziskovalce in zlasti ljudi, ki živijo v mestih, kljub temu se še naprej izdelujejo na enak način in s podobno vsebino. V Buenos Airesu so bili tako eden za drugim oblikovani načrti na ravni občin in celotnega metropolitanskega območja, ki so ponujali podobo idealiziranega mesta in so jih dale izdelati skupine, ki so bile na oblasti. V času nastajanja tega članka je v Buenos Airesu potekala javna razprava o okoljsko-urbanističnem načrtu mesta (*Plan Urbano Ambiental*), sprejetem leta 2008. Načrt naj bi temeljil na sedmih glavnih ciljeh (Consejo, 2023), ki jih avtorji tukaj izpostavljajo zato, da bi ponazorili in potrdili pogosto prisotnost zgoraj omenjenih treh prvin v urbanističnih načrtih in težnjo po pripisovanju velike vrednosti vključevanju javnosti.

Iz preglednice 1 je razvidno, da se načrt jasno razlikuje od prejšnjih načrtov za Buenos Aires, iz nje pa je razvidna tudi smer, v katero se običajno razvijajo mesta, ali smer, značilna za sodobni urbanizem: pripisovanje čedalje večjega pomena pogajanjem in jasno zapostavljanje oblikovanja. Regulativno urejanje je zagotovo postalo bolj kompleksno, hkrati pa ga je lažje izvajati. Za natančnejše razlikovanje urbane realnosti v različnih družbenogospodarskih okoljih so potrebne nadaljnje razprave: v revnih državah je na primer v večjih mestih čedalje več predelov, ki niso v skladu z urbanističnimi predpisi in uradno oblikovani, ustvarjajo pa temelje za nove oblike pogajanj.

Ciudad de México, zgrajen na podlagi smernic kraljevih uredb kolonialne Španije, se nikoli ni mogel povsem otresti vpliva prvotne naselbine, na območju katere je nastal. Po preizkušanju delnih predlogov in urbanističnih rešitev, ki naj bi mestu dali

Preglednica 1: Okoljsko-urbanistični načrt Buenos Airesa in tri načrtovalske prvine

| Cilji načrta | Prepoznane načrtovalske prvine |
|---|---|
| Izboljšanje kakovosti življenja prebivalcev | Večinoma pogajanja, nekaj določanja regulativnega okvira in nekaj oblikovanja |
| Spodbujanje pravičnejšega razvoja mesta | Večinoma pogajanja, nekaj določanja regulativnega okvira in nekaj oblikovanja |
| Doseganje soglasja med deležniki in institucionalnimi mehanizmi | Pogajanja |
| Spodbujanje bolj socialno, okoljsko, ekonomsko in urbanistično učinkovitih javnih in zasebnih naložb | Večinoma določanje regulativnega okvira, nekaj pogajanj in mogoče nekaj oblikovanja |
| Oblikovanje pravnega in institucionalnega okvira za združitev občinske in metropolitanske pristojnosti | Pogajanja |
| Zagotavljanje ustreznega dostopa do čistega zraka, vode, hrane, varnega gibanja, življenja v okolju, ki ni onesnaženo in ima dovolj odprtih prostorov, za vse | Večinoma določanje regulativnega okvira, nekaj pogajanj in mogoče nekaj oblikovanja |
| Zaščita kulturne, arhitekturne in naravne dediščine v mestu | Večinoma določanje regulativnega okvira, nekaj oblikovanja |

Preglednica 2: Splošni urbanistični program Ciudadada de Méxicain tri načrtovalske prvine

| Cilji programa | Prepoznane načrtovalske prvine |
|---|--|
| Odprava korupcije tako, da se ljudem zagotovi več možnosti za izražanje mnenj | Nekaj pogajanj in določanja regulativnega okvira, nič oblikovanja |
| Zagotovitev več virov za razvoj infrastrukture in javnih storitev | Večinoma pogajanja, nekaj določanja regulativnega okvira in mogoče nekaj oblikovanja |
| Pri urejanju novih območij v mestu morajo investitorji zagotoviti ustrezno infrastrukturo | Večinoma določanje regulativnega okvira, nekaj pogajanj in nič oblikovanja |
| Uskladitev večjih urbanističnih projektov z lokalno skupnostjo | Pogajanja |
| Poenostavitev postopkov za pridobitev uporabnih dovoljenj | Nekaj določanja regulativnega okvira in pogajanj, nič oblikovanja |
| Spodbujanje dialoga med sosedi | Pogajanja |
| Spodbujanje mešane rabe prostora (vsaka novogradnja mora vključevati vsaj 30 % socialnih stanovanj) | Določanje regulativnega okvira |
| Ureditev enajst prometnih koridorjev za odpravo prometnih zamaškov | Oblikovanje |

svetovljansko (tj. francosko) podobo (glej Christlieb, 1998), kot na primer med predsedovanjem Porfiria Díaza, so bili prvi predlogi za sodobno urbanistično zasnovo mesta oblikovani ob razmahu industrije in razširitvi železniškega omrežja konec 19. stoletja. Sredi 20. stoletja je bil pod vodstvom arhitekta Carlosa Contrerasa zanj izdelan prvi regulacijski načrt (*Plan Regulador de México*), v katerem je bil poudarek na simetriji, redu, skladnosti s predpisi in javnem zdravju (McMichael, 2002). Čeprav Contrerasov načrt še danes velja za nekaj, kar je pozitivno vplivalo na mesto, je daleč od današnjih načrtovalskih idealov. V skladu z načeli obdobja, v katerem je živel, je bilo zanj sodelovanje javnosti (tj. pogajanje) smiselno samo, če je podrejeno tehnični racionalnosti, načrtovanju, ki temelji na raziskavah, in modernizaciji (Aguilera, 2017). Čeprav je načrt

temeljal na Le Corbusierovem pristopu, ga je usklajevala lokalna ekipa arhitektov in urbanistov, katerih predlogi so bili zato drugačni od tistih, ki so jih predstavili arhitekti, ki so urejali načrte za druga mesta v Latinski Ameriki (npr. Jean-Claude Nicolas Forestier za Buenos Aires, Karl Heinrich Brunner za Bogoto, Maurice Rotival za Caracas in Alfred Agache za Rio de Janeiro) (Aguilera, 2015).

V načrtih, ki so sledili, je postalo pomembnejše urejanje rabe prostora. Leta 1997 je mesto sprejelo splošni urbanistični program (*Programa General de Desarrollo Urbano*), ki je bil leta 2002 prenovljen in velja še danes. Leta 2022 je uprava Ciudadada de Méxicadala prebivalcem v pregled in potrditev nov splošni urbanistični program, pri čemer so se takoj usule

kritike prebivalcev, da je za potrditev tega rok prekratek. Kot navaja županja Ciudadada de México Claudia Sheinbaum (2019), načrt temelji na osem glavnih ciljih, ki jih avtorji tukaj izpostavljajo zato, da bi ponazorili in potrdili pogosto prisotnost zgoraj omenjenih treh prvin v urbanističnih načrtih in visoko vrednost, ki se pripisuje sodelovanju javnosti.

Trenutni načrt mesta predvideva ureditev, ki je zelo daleč od tiste v predhodnih načrtih, ki so stremeli ali k sodobnosti in evropeizaciji (zlasti k francoskemu modelu mest) ali k modernistični funkcionalnosti. Izmed treh prvin je oblikovanje komaj zaznavno, določanje regulativnega okvira je zaželeno, a nikoli dejansko izvedeno, poglobljena pa so pogajanja, zlasti ker je bil nadzor nad rabo prostora neuspešen, tehnicizem pa se je izkazal za nezmožnega odzivanja na družbene kompleksnosti.

V predlaganih in (delno) sprejetih urbanističnih načrtih São Paula se ponavljajo naslednji vidiki, značilni za večino brazilskih mest:

1. navezovanje na evropske modele, ki poudarjajo projekte opleševanja, širitev cestnega omrežja, odpravo revnih območij v središču mesta in gradnjo infrastrukture. Tako je bilo tudi v načrtu ureditve avenij v São Paulu (*Plano das Avenidas*), ki ga je predlagal župan Prestes Maia, v ospredju oblikovanje (skupaj z regulativnim okvirom). Maia (1930) je v njem opozoril na nujno potrebo po posodobitvi mesta, ki takrat ni moglo z ničemer pritegniti tujega turista. Pred tem so bili izdelani samo načrti za ureditev posameznih delov mesta, npr. predelov za bogate, imenovanih *Jardins*, za kar so najeli tuje podjetje The City;
2. sprejetje številnih celovitih načrtov, v katerih je bilo predlagano coniranje celotnega mesta, in ustanovitev posebnega odseka javne uprave, ki bi nadziral rabo prostora v mestu. V primeru São Paula sta bila v letih 1971 in 1988 sprejeta načrta, katerih glavni namen je bil zagotoviti regulativni okvir za urejanje mestnih zemljišč: V načrtu iz leta 1971 so jasno določena pravila za določanje rabe prostora in coniranja, ki še vedno temeljijo na modernističnih načelih racionalnega in funkcionalnega mesta, s katerimi naj bi se dosegel njegov glavni cilj: oblikovanje zaželenega mesta izključno na podlagi urbanističnih predpisov (zakon št. 7688 z dne 30. decembra 1971, port. *Lei nº 7688, de 30 de dezembro de 1971*). V načrtu iz leta 1988 so pravila in cone nekoliko spremenjeni, načrt pa še vedno vsebuje enaka orodja in splošne smernice (zakon št. 10.676 z dne 7. novembra 1988, port. *Lei nº 10.676 de 7 de novembro de 1988*);
3. na začetku 21. stoletja je bil v državi uveden nov način izdelave urbanističnih načrtov. V skladu s smernicami zveznega zakona št. 10.257, imenovanega statut mesta, se je na področju urbanističnega načrtovanja začelo obdobje pogajanj, ki so zasenčila vse druge cilje (Ultramari in Silva, 2017).

V veljavnem strateškem urbanističnem načrtu São Paula, sprejetem leta 2014, je jasen poudarek na sodelovanju javnosti (São Paulo, 2023). Tako kot okoljsko-urbanistični načrt Buenos Airesa (trenutno še v javni razpravi) urbanistični načrt São Paula temelji na nekaterih načelih, ki so navedena v uradnem besedilu načrta in jih javnosti predstavljajo predstavniki javne uprave. Avtorji jih tukaj izpostavljajo zato, da bi potrdili soobstoj glavnih urbanističnih prvin v tem načrtu.

Kot je razvidno iz preglednice 3, so pogajanja zagotovo najpomembnejša značilnost urbanističnega načrta São Paula. Ta temelji in v nekaterih primerih nadgrajuje načrt iz leta 2014, pri katerem je bil pomen pogajanj poudarjen že v osnutku, njegovi predstavitvi, ki jo je izvedla občina, in zlasti v postopku priprave načrta: vključenih je bilo več kot 25 ljudi, pregledanih je bilo 10.000 predlogov, ki so jih predstavili družbeni deležniki, opravljenih je bilo 60 javnih razprav, pri čemer je bila zagotovljena popolna preglednost vsakega dogodka (São Paulo, 2014).

Pri pregledu urbanističnih načrtov, ki so bili sčasoma oblikovani za vsako mesto, lahko med mesti opazimo mnoge podobnosti v načrtovalskem pristopu. Vsa tri so največja mesta Latinske Amerike, pri vseh pa je načrtovalski proces vključeval vse tri proučevane prvine urbanističnega načrtovanja. Vsak je imel v načrtovalskih obdobjih večji ali manjši pomen, kar je bilo značilno za vsa tri mesta, zato lahko te prvine kronološko primerjamo in analiziramo. Najzgodnejši načrti so se močno naslanjali na oblikovalski pristop, na katerega je vplival modernizem (npr. novi načrt Buenos Airesa, oblikovan med letoma 1907 in 1911, regulacijski načrt Ciudadada de México iz sredine 20. stoletja in načrt avenij v São Paulu, ki ga je leta 1930 predlagal župan Maia). V nadaljnjih načrtih je bilo oblikovanje postopno potisnjeno v ozadje, večji poudarek pa je bil namenjen regulativnemu okviru in v novejšem času sodelovanju (npr. okoljsko-urbanistični načrt Buenos Airesa, odobren leta 2008 in v javni razpravi od leta 2020, urbanistični načrt Ciudadada de México, sprejet leta 1997 in prenovljen leta 2002, in strateški urbanistični načrt São Paula, sprejet leta 2014, trenutno v postopku prenove).

Pomen regulativnega okvira in sodelovanja javnosti se je sčasoma povečal v vseh treh mestih, s tem pa tudi vloga pogajanj in interdisciplinarnе obravnave urbanističnih vprašanj. Urbanizem platforme je velik izziv, zaradi katerega je urbanistično načrtovanje postalo še bolj zapleteno. Ob novih pomembnih vidikih, kot so okoljska in socialna vprašanja, čedalje večja vloga participativnega procesa in združevanje načrtovanja in oblikovanja politike, je v načrtovalski proces čedalje težje vključevati vse tri temeljne načrtovalske prvine. Navedeno je na področju urbanističnega načrtovanja trenutno velik izziv.

Preglednica 3: Strateški urbanistični načrt São Paula (v pripravi) in tri glavne načrtovalske prvine

| Cilji načrta | Prepoznane načrtovalske prvine |
|--|--|
| Zagotavljanje družbene pravičnosti | Večinoma pogajanja, nekaj določanja regulativnega okvira in mogoče nekaj oblikovanja |
| Izboljšanje kakovosti življenja | Večinoma pogajanja, nekaj določanja regulativnega okvira in oblikovanja |
| Zagotovitev bolj gospodarne rabe naravnih virov | Večinoma pogajanja, nekaj določanja regulativnega okvira in mogoče nekaj oblikovanja |
| Zagotovitev sodelovanje javnosti pri odločanju o prihodnosti mesta | Pogajanja |

4 Dileme soobstoja: pogajanje v središču načrtovanja

Namen regulativnega okvira je zagotoviti temeljne pravice, ki so neposredno povezane z naravnim in grajenim okoljem, pri čemer je še vedno dovolj prostora za prilagoditve, ki so rezultat odprtih pogajanj med deležniki. Čeprav imajo predpisi o rabi prostora plemenit namen (kar lahko potrdijo tudi njihovi nasprotniki), lahko v praksi omejijo dostopnost mestnih zemljišč za skupine prebivalcev z nižjimi dohodki (White in Allmendinger, 2003) ali pripadnike etničnih manjšin (Whittemore, 2016) in podprejo zlasti interese finančnega sektorja. Kot navajata Alfasi in Portugali (2004), so pretirano regulirani načrti primer pristopa za vsak primer: zajeten niz predpisov, ki naj bi se uporabljali, če se v mestu morda zgodi neki pojav. Po drugi strani je za nepredvidljive dogodke primernejši pristop ravno ob pravem času, pri katerem se uporablja čim manj predpisov, ki se lahko hkrati tudi prilagodijo. Ta pristop vsi povečujejo, hkrati pa se v praksi redko pravilno izvaja – čeprav je težko ugotoviti, kdo ima sploh pravico soditi o njegovi pravilnosti. Regulativni okvirji običajno vzbujajo podobne odzive: ali jih zavračamo kot neučinkovito orodje za nadziranje družbe in družbenih prostorov ali pa nas premamijo njihove obljube, čeprav se zavedamo, da jih je treba prenoviti.

Strateška prenova bi se lahko začela z delno deregulacijo zemljišč, pri čemer se pojavi vprašanje, katere predpise bi bilo treba odpraviti in katere obdržati. Pregledni in prožni regulativni okvirji so namenjeni blaženju neravnovesij moči med deležniki na različnih ravneh, kar Alfasi in Portugali (2004: 34) poimenujeta parapolitika. Ta ni razvidna iz uradnih dokumentov, ampak se kopiči posredno kot posledica posameznih odločitev. Fainsteinova (2000: 458) navaja, da je pri pogajanjih moč besed pogosto odvisna od moči govorcev. Innesova (2004: 12) podobno ugotavlja, da vsi pri mizi vedo, kdo ima zunaj moč in kdo ne ter kolikšno moč ima vsak akter. Iz tega izhaja dilema, povezana s pogajanjem: pogajanja omejujejo določanje regulativnih okvirov, hkrati pa pogajanja omejuje oblikovanje. Posledično so pogajanja potrebna tako za regulacijo kot deregulacijo, vključujejo pa deležnike z različnih ravni (vse od

predstavnikov vladnih organizacij, civilnih gibanj in mednarodnih organizacij do zasebnih deležnikov) (Holsen, 2020).

Kljub različnim metodam ostaja bistvo načrtovanja povsod enako: doseganje idealnega scenarija na podlagi vnaprej določenih pravil. Glavna kritika današnjih načrtovalskih procesov je, da dejansko ne vključujejo oblikovanja (Bertaud, 2018), čeprav se predpisi v zvezi z gradnjo stavb posredno navezujejo tudi na oblikovanje (Talen, 2012). Kot navajata Barnett in Chafee (2008: 11), lokalni predpisi, ki urejajo prostorsko rabo, veljajo za skoraj vsako novogradnjo in vplivajo na podobo vsake skupnosti. Z regulativnim okvirom je povezana dilema, da omejuje oblikovanje, tega pa omejujejo pogajanja.

Zagovorniki participativnega načrtovanja čedalje bolj poudarjajo vlogo, ki jo lahko ima oblikovanje v načrtovalskih procesih (Carmona, 2013; Abd in Asaad, 2021). Podobno tudi Fainsteinova (2000) meni, da lahko novi urbanisti kljub formalističnemu pristopu k oblikovanju uspešno prenesejo urbanistična načela v regulativne okvire in posledično v načrtovalske procese vključijo lokalne skupnosti. Bondova in Thompson-Fawcettova (2007) sta kritični do neotradicionalnega urbanizma, češ da je bolj kot sodelovanju javnosti namenjen temu, da javnost pridobi na svojo stran, hkrati pa ugotavlja, da so novi urbanisti s pogostimi javnimi oblikovalskimi delavnicami okrepili vlogo oblikovanja pri urbanističnem načrtovanju.

Čeprav je trajalo zelo dolgo, da si je urbanistično oblikovanje v razvitih državah priborilo pomembno vlogo v načrtovalski praksi, je bilo v devetdesetih let 20. stoletja že dobro uveljavljeno področje (Punter, 2007: 168). Kljub vsemu se v oblikovalskih zasnovah le redko upošteva kompleksnost načrtovalskih procesov, ki vključujejo najrazličnejše akterje z različnimi in pogosto nasprotujočimi si interesi. Kot izpostavlja Punter (2007: 169), so si urbanistično oblikovanje prilastile javne oblasti, da bi estetizirale megaprojekte, bolj demokratične, egalitarne in trajnostne oblikovalske prakse pa so potisnjene v ozadje. Oblikovanje kot konkretna vizualizacija urbanistične idealizacije je dvojni proces: po eni strani olajša pogajanje, ker ponudi vnaprej izbrano in zaželeno rešitev, po drugi strani pa

omogoča prepričevanje, pri čemer so nekateri predlogi predstavljeni kot bolj privlačni. Zaradi edinstvene sposobnosti, da združuje razne mestne prvine in prepozna možnosti za mestno okolje, je lahko oblikovanje močan katalizator v načrtovalskem procesu, ki upošteva številne kombinacije časovnih in prostorskih ravni. Z njim je povezana dilema, da omejuje pogajanja, tega pa omejujejo regulativni okviri.

Ta dilema je razvidna iz večine primerov novih oblikovalskih rešitev, lahko v kombinaciji z načrtovanjem in pogajanjem ali kot samostojna praksa upravljanja prostora. O pristopu urbane akupunkture, ki ga je prvi razvil Manuel de Solà-Morales, je med svojini tremi županskimi mandati v brazilskem mestu Curitiba dalje teoretiziral in ga v praksi uporabljal Lerner (2014). Zaradi razmeroma nizkih stroškov, močnega učinka in spodbujanja razvoja skupnosti se je ta vrsta prostorskega posega začela širiti v državah v razvoju (Fabricius, 2011). Kot ugotavlja Burdett (2012: 94), sta med prednostmi urbane akupunkture prožnost in prilagodljivost urbane oblike in arhitekture, ki lahko okrepi občutek navezanosti na kraj in identiteto lokalne skupnosti.

Med tremi prepoznanimi dilemami je pri načrtovanju vedno samo tista, povezana s pogajanjem. Vsak načrt prostorske rabe vključuje nekaj pogajanja, kar pomeni, da ima pomembno ali poglavitno vlogo pri načrtovanju. Načrtovanje ni mogoče brez pogajanja, mogoče pa je brez regulativnega okvira ali oblikovanja. Zato je njegova najpomembnejša prvina. To postane jasno tudi pri analizi zgodovinskega razvoja treh največjih mest Latinske Amerike.

5 Razprava

Kritično analizo načrtovalskih procesov je spodbudilo dejstvo, da proučevani trije glavni vidiki načrtovanja vplivajo drug na drugega in na življenju v mestu na splošno. Z boljšim razumevanjem teh vidikov in povezanosti med njimi lahko ugotovimo, kako določajo današnja mesta. Podlaga za razpravo je bil kritični pregled vlog regulativnega okvira, oblikovanja in pogajanja v sodobnih načrtovalskih razpravah.

Pravilna kombinacija treh proučevanih prvin se morda zdi popoln recept za idealno mesto, uvedba načel, ki morda veljajo za pravilna v splošnejšem urbanem kontekstu, pa je lahko v konkretnjših primerih usodna. Ker so urbanistične zadeve pogosto vir morebitnih nasprotij, je treba usklajevati teorijo in prakso. Avtorji menijo, da izzivi, povezani z enakovredno razporeditvijo prednostnih nalog in potreb, ne smejo vplivati na odločitve o tem, kako je treba nekaj načrtovati in kakšno kombinacijo načrtovalskih prvin bi bilo treba pri tem uporabiti. Nasprotno: idealno mesto – ne glede na to, kaj to je ali kako uresničljivo

je – bi moralo biti edino vodilo v vseh prizadevanjih za spremembo mesta. Pomen treh prvin urbanističnega načrtovanja, obravnavanih v tem članku, je razviden iz dejstva, da lahko to, kako te prvine razumemo, razširi ali zoži meje zamišljenega idealnega mesta. Z obravnavo zapletenih odnosov med tremi glavnimi prvini urbanističnega načrtovanja lahko končno razumemo, kako se o urbanističnih idealizacijah razmišlja in kako se včasih te idealizacije izvedejo v praksi. Želje, načela in idealizem so nujna orodja za načrtovanje mest, čeprav se nato pri izvedbi konkretnih prizadevanj vedno spremenijo.

Tri največja mesta Latinske Amerike, izbrana za analizo, imajo zelo podobno preteklost (vsa so bila podvržena evropski kolonizaciji) in so sčasoma kljub lokalnim razlikam uporabljala podobne urbanistične pristope. V navedenih mestih je opazen čedalje večji pomen pogajanja pri urbanističnem načrtovanju, ki trenutno daje večji poudarek participativnim procesom kot pa oblikovalskim rešitvam. Obravnavane prvine urbanističnega načrtovanja so bile v vseh treh mestih v različnih obdobjih uporabljene v različnih (neenakovrednih) kombinacijah: sprva kot kombinacija oblikovanja in pogajanja, v zadnjem času pa kot kombinacija regulativnega okvira in pogajanja. Kljub različnim kombinacijam so se pogajanja v načrtovalskem procesu vedno izvajala, naj bo to pri pretirano oblikovanih ali pretirano reguliranih mestih.

6 Sklep

Čeprav so avtorji v članku potrdili hipotezo o tem, da uravnotežen soobstoje proučevanih prvin ni mogoče, je prizadevanje za doseganje ravnovesja med njimi vredno truda. Iskanje ravnovesja, čeprav neotipljivega, vključuje potreben skepticizem in napore, potrebne za doseganje novih in pomembnih delnih rezultatov. Namerno neravnovesje med tremi prvini lahko omejuje izgradnjo idealnega mesta, zato je mogoče sklepati, da tudi če nam ne uspe v celoti uravnovesiti pomena vseh treh načrtovalskih prvin, se je vredno za to truditi. Camus (1955) meni, da je po analogiji s Sizifovimi neskončnim kotaljenjem skale na vrh gore vsaka naloga vredna truda, čeprav se nam na prvi pogled zdi nesmiselna: predstavljati si moramo, kako je bil Siziif srečen kljub kazni, ki so mu jo naložili bogovi.

Zgodovinska podobnost treh proučevanih mest z vidika uradnega urbanističnega načrtovanja spodbuja tudi razmišljanje o nečem, kar ne spada v okvir tega članka, ampak je kljub temu zelo zanimivo: Zakaj so mesta v državah Latinske Amerike, ki imajo zelo različne lokalne in regionalne uprave ter nacionalne vlade, tako podobna z vidika zgodovinske smeri razvoja urbanističnih načrtov in tega, da skupine, ki so na oblasti, koncept idealnega mesta prilagodijo samim sebi (Delgadillo, 2014)? Odgovor vsekakor ni v načrtih ali lokalnih procesih,

ampak prej v večjem, globaliziranem kontekstu, v katerem se je predstavniška demokracija znašla v krizi.

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UDC: 711.4:364.4-053.9:551.588.7
doi:10.5379/urbani-izziv-en-2023-34-01-01

Received: 16 February 2023
Accepted: 16 March 2023

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Integrating climate change responses into age-friendly city domains: A theoretical review

This study focuses on older adults, who are disproportionately vulnerable to climate change due to their health, physical, and socioeconomic conditions. On the one hand, climate change has grown into the most challenging issue on the international agenda for the twenty-first century due to its adverse impacts. On the other hand, the global population has been ageing rapidly, especially in urban areas. The link between these two major concerns is unclear in theory and practice; hence, easy-to-use universal guidelines offering possible solutions for governments, institutions, and communities for irremediable impacts are an urgent necessity. Based on this imperative, this article presents climate change-responsive age-friendly city domains through a critical literature re-

view. Seven domains are prioritized at various scales to represent the core planning areas of age-friendliness and climate-change resilience in urban areas: environmental safety, information and participation, health and social services on the city scale, surroundings and transportation on the neighbourhood scale, outdoor spaces and thermal comfort, and housing on the housing cluster scale. The interaction between these two concerns in the framework provided by this study contributes to raising awareness, building actions, and directing policies from a global perspective.

Keywords: climate change, age-friendly city, population ageing, sustainability, urban policy

1 Introduction

The impacts of climate change on cities have already been observed globally. According to recent findings, human-induced greenhouse gas (GHG) emissions are leading to the loss of ice sheets and glaciers, rising sea levels, and increasing global temperatures. The increase in temperatures is causing changes in the climate system, such as more severe and frequent hot extremes, heavy precipitation, drought, and extreme weather events. Many of these changes are irreversible when past and potential future GHG emissions are considered (IPCC, 2021). Cities are the centres of dense and diverse populations, socio-economic activities, government institutions, and structural investments (Hunt & Watkiss, 2011). Therefore, adapting settlements to changing climate systems and mitigating negative impacts has been the focus of recent urban strategies. Increasing resilience by fostering adaptive capacities, diminishing vulnerabilities, and eliminating risks has been one of the greatest priorities of local, national, and global institutions (Bulkeley & Tuts, 2013).

Demographic changes constitute the other side of these concerns because the population has been ageing globally (Palacios, 2002). This change has created new perspectives and challenges for urban planning and policies. The notion of age-friendliness underlines how cities can adapt to demographic change through urban planning. The World Health Organization (WHO) presented the determinants of age-friendliness of cities (WHO, 2007) to promote active ageing and health for older adults. This is the first and only international and legitimate guide. Active aging means allowing older adults to maintain their life in a place where they can meet their needs for as long as possible (Beard & Petitot, 2010). However, changing climate brings about extraordinary conditions that may affect older adults' health and consequently their ability to sustain an active urban life. Their medical, physical, financial, and social conditions make them more vulnerable to climate change (Gamble et al., 2013; Carnes et al., 2014).

These inequitable vulnerabilities have been pointed out in climate justice scholarship, highlighting the significance of the local engagement of those groups in climate action plans (Hughes & Hoffmann, 2020). In the transition of cities to a greener, more sustainable, and more resilient structure, the position of vulnerable groups and climate justice in the transition to post-carbon and adaptive societies and cities need to be discussed to empower these communities in the decision-making process and to reduce inequalities (Yang et al., 2021). Most age-friendly city approaches are restricted by business-as-usual conditions without climate change parameters in the framework (Wang et al., 2021). This limited perspective is a barrier to eliminating disproportionate vulnerabilities and pursuing

climate justice. Therefore, this article provides new perspectives for transformation into climate-resilient age-friendly cities through a critical literature review. By linking climate change management actions and age-friendliness, this article provides a more inclusive and just framework for a specific social group that faces uneven impacts: older adults.

The study first presents the impacts of climate change on health with a focus on urban settlements to better understand the potential risks. It then discusses older adults' vulnerabilities and inequalities to highlight the need for climate justice, followed by an examination of urban adaptation and mitigation literature to describe strategies to mitigate the adverse impacts of climate change on older adults. The article criticizes age-friendly city determinants to define the gap between their current form and the desired climate resilience. Finally, it proposes new determinants for a more comprehensive approach that brings climate change and ageing concerns together and discusses the findings.

2 Health impacts of climate change in urban settlements

More than half of the world's population lives in urban areas that are considered highly susceptible to climate stressors. Furthermore, older adults, who are highly vulnerable to climate impacts, are expected to form 22% of the population by 2050 (United Nations, 2022). Climate-related diseases, malnutrition, and deaths have already been observed globally. Over the past decade, respiratory diseases due to exposure to heat, cold, air pollution, and waterborne diseases after flood disasters can be linked to climatic variables. The projections reveal that anthropogenic climate change will increase the severity of the effects (IPCC, 2022).

Heat-related risks in cities are the most reported climate change exposure in the literature (Leyva et al., 2017) due to the urban heat island (UHI) effect, which intensifies the impacts of heatwaves, causing an increase in the risk of mortality and air quality-related health problems (Carnes et al., 2014). The high density of cities, heat-absorbing buildings and surfaces, limited airflow, and less natural and green space increase serious health risks in urban areas in particular during long heatwaves (Haines & Patz, 2004; Carnes et al., 2014; Xie et al., 2015). The frequency of extreme heat exceeding health thresholds is expected to increase in higher global warming scenarios; consequently, heat-related problems in urban settlements are projected to increase (IPCC, 2022).

Air pollution in urban areas is another detrimental effect addressed by much research. The latest IPCC report (2021) states that even in shallow GHG scenarios (SSP1-1.9) the air quality is below WHO standards, particularly in very polluted regions. In urban areas, emissions caused by economic activities, transportation, land-use changes, waste disposal, and energy demand reduce air quality, and limited airflow causes concentration of pollutants. Exposure to pollutants exacerbates respiratory and cardiovascular disorders such as asthma, heart attack, and cancer (Baja et al., 2010; Chang et al., 2022).

Sea level rise is a major threat to populations in coastal zones due to the risk of more frequent and severe coastal flooding and storm surges. Extreme climate events such as floods, storms, and heavy rain jeopardize not only natural and built environments but also inhabitants' lives. Moreover, floods can be linked to acute consequences such as waterborne diseases and epidemics due to contamination of drinking water (Gamble et al., 2013). The major reason for augmented risk in urban areas is increased impermeable surfaces that cause street flooding in heavy rain and land-use changes (Iqbal et al., 2022).

Because the organisms that cause diseases and epidemics are strongly sensitive to climatic variables, climate change will affect the pattern of infections (Thomas, 2020). As lately experienced globally, the COVID-19 pandemic caused the death of millions of people (WHO, 2022), especially those that have chronic diseases and are older (Centers for Disease Control and Prevention, 2022a). During the pandemic period, governments took serious precautions to prevent mass transmissions, such as lockdowns, surveillance, and quarantine. The capacity of the healthcare systems was also questioned even in developed countries (Oğur et al., 2021). Climate change is expected to increase the severity and frequency of these kinds of negative experiences locally and globally (IPCC, 2022).

3 Vulnerability and climate justice for older adults

Some regions have already experienced distinctive climate change impacts based on their level of exposure to geographic variables, their sensitivity based on social, economic, and structural susceptibility, and their adaptive capacity to accommodate these alterations and adjust their systems (McDermott-Levy et al., 2019; IPCC, 2021). Communities' ability to assemble, and to overcome and recover from climate change, is associated with their economic conditions, education, living environment, access to healthcare services, technology, information, household size, and people's ethnic groups, ages, and sexes (Lynn et al., 2011; Rhoades et al., 2018). Some social groups are more vulnerable and susceptible to any sudden

shocks because of their health or economic conditions or social exclusion. They also have a lower adaptive capacity to changing conditions because they have limited access to information, financial resources, and technology. These socioeconomic inequalities and structural injustices are decisive in the severity of the consequences (Phelan et al., 2004).

Older adults are one of the most vulnerable sub-groups (Chang et al., 2022; IPCC, 2022), with physical, economic, and social disadvantages that require serious consideration (Gamble et al., 2013; Carnes et al., 2014). Cities need to provide specific services and support for their wellbeing as well as to protect them from future risks (WHO, 2007). The climate-related mortality rate is higher in the older age group due to higher morbidity and pre-existing health disorders (Balbus & Malina, 2009). Furthermore, they are unable to readily react in an emergency such as a severe climate-related disaster like flooding (van Hoof et al., 2021). In addition to health impacts, this limits their lifestyles, prevents their participation in public life, and decreases their quality of life.

To promote active ageing for older adults, they need to engage in urban public life and regular physical activities "safely, independently, comfortably, regardless of age, income or ability level," also known as "ageing in place," which is a crucial concept for age-friendliness (WHO, 2002; Centers for Disease Control and Prevention, 2022b). Low-quality built environments and housing are major barriers to the wellbeing of older adults that increase both indoor and outdoor risks. For instance, an urban space with low outdoor thermal comfort due to its structural character discourages older adults from spending time outdoors even for their daily needs (Wang et al., 2021). Climate-related disaster risks may force people to leave their living environment. Such displacement may cause mental, psychological, or social complications and trauma (Gifford & Gifford, 2016). Therefore, it is important to integrate environmental aspects into urban studies addressing age and to discuss this issue from the perspectives of climate and social justice.

Although the older generation has greater responsibility for GHG emissions than the younger one, they are the ones most affected by these emissions-triggered impacts (Haq, 2021). Climate justice derives from environmental justice and focuses on the uneven distribution of climate change impacts at an international level (Gardiner, 2011; Mitchell & Chakraborty, 2014; Schlosberg & Collins, 2014), but it is inseparable from social justice. To reduce the susceptibility of the disadvantaged social group, older adults, justice implications should address spatial, social, and economic vulnerabilities in adaptation, mitigation, and transition policies (Brisley et al., 2012).

4 Methodology

The purpose of this article is to integrate climate change–responsive city and age-friendly city planning perspectives. On this basis, the methodology is formed as a critical review to provide responses to the main research questions:

1. What are the planning approaches for a climate-responsive urban space that considers older adults' specific needs?
2. To what extent does the age-friendly city guide cover climate responsiveness?
3. What are the domains that bring climate change management actions and age-friendliness together?

The research was carried out in three methodological steps. First, the impacts of climate change on older adults in urban space and potential mitigation approaches in the literature are reviewed to extract approaches to achieving a climate-responsive city. Second, the age-friendly city guide by WHO (2007) is examined from the perspective of climate change action. The WHO guideline is taken as the basis because it is the first and only legitimate regulation in age-friendly literature and is widely used. Third, scales and new domains are defined by bringing the two concepts together. Scaling is important for organizing planning interventions and developing urban policies because the needs of urban spaces and their planning procedures differ based on their scale. It also addresses the administrative level of the implementing agency. On the other hand, although all scales may overlap, some interventions should be decided through a top-down approach, which means they need to be organized from the upper level but others need to be planned at the bottom level. The differences between the scales are explained below.

The city scale refers to the size and scope of the entire city or urban area. It encompasses all the buildings, infrastructure, and natural features within the city limits, and it often extends beyond this to include the surrounding suburbs or rural areas that are influenced by the city. City-scale planning considers issues such as transportation, housing, economic development, and public services that affect the entire city.

The neighbourhood scale refers to a smaller geographic area within a city or town. It typically encompasses several city blocks or a specific community within the city. Neighbourhood scale planning focuses on the unique characteristics of the neighbourhood, such as its physical layout, architecture, and demographics, and it seeks to address issues such as transportation, public spaces, and social services that affect the quality of life in that area.

The housing cluster refers to a grouping of residential buildings within a neighbourhood or city. It includes apartment buildings, townhouses, or single-family homes that are clustered together in a particular area. It refers to a living area and facilities within 15 minutes' walking distance. Housing cluster planning focuses on issues such as density, affordability, and the provision of necessary services such as schools, parks, and public transportation. The goal is to create liveable, sustainable communities that meet the housing needs of residents while enhancing the overall quality of life.

5 Mitigating adverse impacts of climate change for older adults

Urban areas are the foci of social, economic, and cultural activities. On the one hand, they produce certain activity patterns that contribute GHG emissions. On the other hand, urban areas are exposed to the highest climate-related risks. This combination places cities in a significant role in leading climate change actions through urban planning and design tools (Rosenzweig et al., 2010). In tackling the adverse impacts of climate change, urban settlements offer effective opportunities to decrease emissions through (renewable) energy, (sustainable) building, (public and green) transportation, and (reduce-reuse-recycle-dispose) waste management strategies, and to increase resilience through (green and grey) infrastructure, (public) service, and (inclusive) governance enhancements. The solutions vary among technological, social, and nature-based or all-integrated considerations (Lin et al., 2021).

Individual solutions such as air conditioning seem practical; however, they increase energy dependency and cost, which is not a proper remedy. For more equally distributed benefits among society and efficiency, multi-scaled urban planning measures are better (Milan & Creutzig, 2015). Building and surface materials, light, the geometry of settlements, and greenery are addressed in relation to the most frequently reported health threat: heatwaves intensified by the UHI effect. Materials with a higher albedo effect, light-coloured paint, or green roofs and facades reduce the heating of surfaces (Milan & Creutzig, 2015; Francis & Jensen, 2017). Streets aligned with the direction of the wind (wind corridors) also contribute to passive cooling and provide cleaner air (Ren et al., 2018). Accessible and continuing green axes are also effective solutions not only for cooling (by providing shade) but also for spreading nature-based solutions across the city by integrating ecology into spatial planning. Green and blue infrastructure as a nature-based solution also helps increase air quality by functioning as carbon sinks, eliminate flooding by providing more permeable surfaces that allow runoff water to be absorbed, and improve the urban ecosystem (Scott et al., 2016; Depietri & McPhearson, 2017; Frantzeskaki et al., 2019).

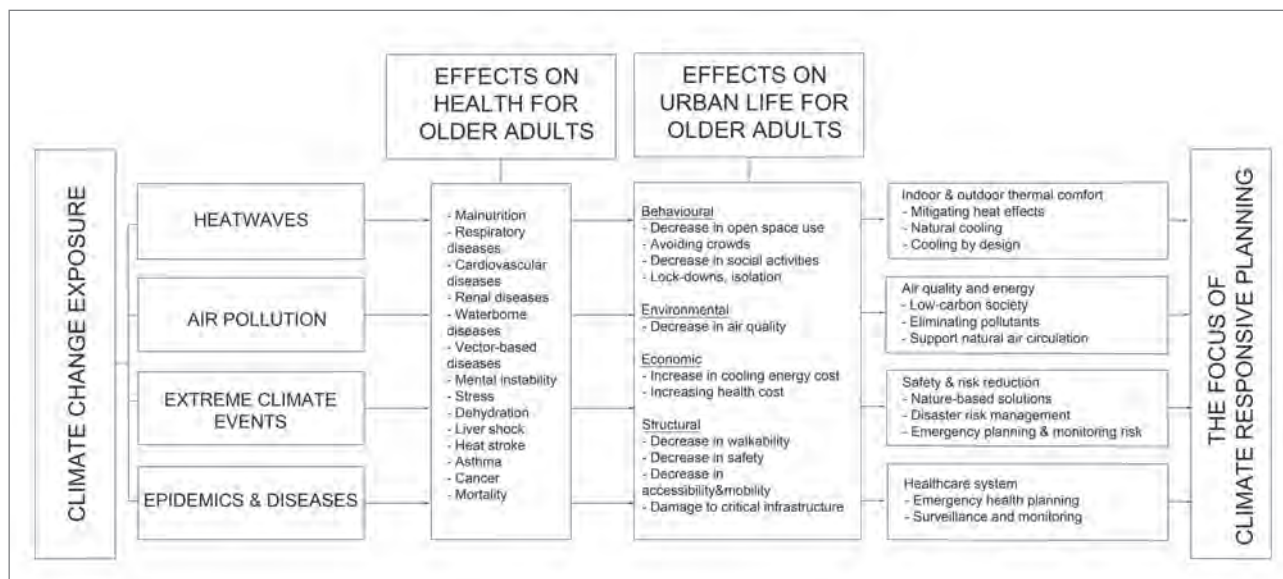


Figure 1: Climate change exposure and the focus of approaches in the built environment for older adults (illustration: authors, based on a literature review).

Social measures revolve around building communication and information channels to inform socially excluded populations. Using multiple media options to reach people that lack internet access maximizes the effect (Brisley et al., 2012). Early warning systems are possible practices that prevent deaths from heatwaves or flooding by allowing reliable communication and information. Another critical point is the effectiveness of the healthcare services in an emergency and sudden shock. In enhancing the healthcare system, surveillance and monitoring of climate change impacts on older adults' health make possible flexible, rapid, and efficient responses (Bambrick et al., 2011). Figure 1 presents the key solutions adopted from the literature for climate-change impact management in built environments for older adults.

Although age-friendly cities have addressed multi-level challenges for the wellbeing and health of ageing communities, climate change remains an environmental barrier that should be eliminated. Available age-friendly guidelines mostly overlook the effects of climate change (Krawchenko et al., 2016). Therefore, extending the age-friendly city framework by adopting climate change responses is a necessity to provide healthy, safe, and inclusive living spaces against the health threats brought about by the actual global crises.

6 The extended framework: climate-responsive age-friendly cities

The proposed framework examines and extends the WHO Age-Friendly City checklist, which is described under eight domains (WHO, 2007). The “outdoor spaces and buildings”

domain needs greater emphasis on thermal comfort, emission concerns, and climate-related disasters, and it should have a multi-scale perspective. Therefore, this domain is reconceptualized into three categories, each representing a different scale: environmental safety, surroundings, and outdoor spaces and thermal comfort. The “transportation” domain remained, but it is enhanced with greater emphasis on sustainable mobility. The “housing” domain requires more focus on energy and thermal comfort concerns. The “social participation”, “civic participation and employment”, and “communication and information” domains need to present climate-related awareness and actions. They are brought together and represented by a more comprehensive domain: “information and participation”. The “respect and social inclusion” and “community support and health services” domains lack emergency actions and preparation for any unforeseeable health event. Thus, they are merged and renamed “health and social services”, containing city-wide service preparation for uncertain climate events. Figure 2 shows a detailed understanding of a “climate-responsive age-friendly city”, developed in this study through a critical review of literature on multiple scales: city, neighbourhood, and housing cluster.

The city scale focuses on three dimensions: environmental safety, information and participation, and health and social services, which need to be addressed at the city level in policies and strategies. Environmental safety is a critical issue in terms of being prepared for unexpected weather events and sudden natural shocks due to the limited capacity of older adults to respond. Therefore, their access to early warning and information systems is highly critical for preparing and protecting themselves (van Hoof et al., 2021). For such a communication



Figure 2: Theoretical framework of the climate-responsive age-friendly city (illustration: authors, based on a literature review).

system, risk needs to be monitored. Stormwater management through nature-based solutions – green infrastructure and permeable pavements – provides a safe and sustainable living environment throughout the city (Jayasooriya & Ng, 2014). Rapid urbanization – especially in developing countries – escalates health problems associated with waste disposal. Hence, sustainability, preserving resources, reducing waste, increasing recycling, and maintaining hygiene are crucial points in waste management (Giusti, 2009).

Information and participation serve to inform older adults about policies, emergency actions, events, and the planning process. An age-friendly city is not possible without being represented by the older adults themselves and not being informed about planning practices and policies. Older adults need to receive information through multiple channels, such as the in-

ternet, TV, radio, and printed booklets (Bukov et al., 2002). They also need to find room to make their voices heard. The climate-responsive age-friendly city needs to start its policies by creating public awareness.

Health and social services are the most important features to be emphasized. In general, older adults visit and need health and social services more than other groups in society (Abbing, 2016). Therefore, accessibility, affordability, and availability of these services and a good surveillance system, especially in high-density cities, are fundamental requirements (Gutman, 2007; Quinn, 2008). Climate responsiveness needs emergency planning, which is critical for reaching older adults during sudden extreme events or other stresses. Identifying those requiring evacuation assistance before any extreme event will help build up an effective emergency plan (Balbus & Malina,

2009). Another problem older adults face is limited social networks due to retirement policies after age 65, which obligate people to leave their jobs and lose their social connections. Therefore, age-friendly environments must support and deliver social interactions and enhance engagement in the community of older adults (Khosravi et al., 2015) to reduce feelings of loneliness, isolation, and depression (Finlay & Kobayashi, 2018). The role of the living environment in this process is to deliver opportunities to engage the community through social urban environment design, community hubs and awareness, and events that create a social environment for all levels of society (Menec et al., 2011; Buffel, Phillipson & Scharf, 2012; Khosravi et al., 2015; Garner & Holland, 2020).

The neighbourhood scale has a supporting role for older adults through transportation facilities and a quality environment. Because people's mobility declines as they age, they tend to spend more time in their neighbourhood, meet their basic needs, and create a social environment (Bayar & Türkoğlu, 2021). Therefore, it addresses issues about "surroundings", which refers to the features of the settlement, and "transportation", which is about mobility within and beyond the neighbourhood.

Surroundings include a healthy ecosystem that provides fresh air and liveable settlements away from pollutants and makes it easy to meet daily basic needs and activities (Gitlin, 2003; Sugiyama & Thompson, 2007). Questioning how the neighbourhood is influenced by the facilities, structures, and infrastructure around it, this aspect highlights the location of settlements. Its closeness to pollution sources – for example, highways, industrial areas, construction areas, and waste disposal land – and higher exposure to pollutants such as NO₂, CO, SO₂, PM_{2.5}, and PM₁₀, is associated with a higher rate of respiratory diseases (Dong et al., 2012; Gong et al., 2012; Simoni et al., 2015). Moreover, the density of a settlement and streets' orientation regarding wind directions have a significant influence on the UHI effect, air quality, and solar radiation. Green infrastructure is an effective, affordable, and feasible strategy to enhance urban infrastructure, increase environmental and air quality, and integrate ecosystem (and ecosystem services) into settlements (Ren et al., 2018; Baldwin et al., 2020).

Transportation is key to older adults' mobility as well as social inclusion in the community (Grimaldi et al., 2016). It promotes sociability and accessibility to urban facilities, and it also enhances the mental wellbeing of older adults (Cvitkovich & Wister, 2001; Rosenbloom, 2009). Access to efficient public transport encourages older adults to retain their independence in daily life and commute to places where they can interact with the community; in doing so, they feel confident and ac-

tive, helping prevent mental illnesses such as depression and loneliness (Metz, 2000; Rosenbloom, 2009; Holley-Moore & Creighton, 2015; Wong et al., 2017). Moreover, the affordability, safety, and accessibility of public transportation are the key factors encouraging older adults to use it (Broome et al., 2013; Wong et al., 2017). The frequency, efficiency, and availability of multiple transport modes provide connections to the city, allow people to travel independently, and foster the social inclusion and wellbeing of older adults (Cvitkovich & Wister, 2001; Rosenbloom, 2009; Aguiar & Macário, 2017). Sustainable, energy-efficient, and adequate design are the main principles of transportation facilities for promoting a healthier environment.

The housing cluster is the immediate environment for older adults to spend daily time. It plays an important role in older adults' life as they spend more time at home due to loss of physical activeness and their social network (Howden-Chapman et al., 1999); therefore, the housing structure needs to deliver multiple choices in an affordable range for all levels of society (Mulder, 2006).

To promote active ageing, outdoor spaces and thermal comfort pay attention to the climate perspective while responding to ageing needs. Ageing limits people to a certain environment due to physical and mental changes; therefore, the living environment is required to meet the needs of older adults within walking distance (Sundquist et al., 2011; Jun & Hur, 2015; Bayar & Türkoğlu, 2021). Accessible, adequate, safe, well-maintained, green, and serving basic urban needs are the fundamental features of supportive and walkable outdoor spaces for older adults (Jackie, 2013; Garner & Holland, 2020). The efficiency of outdoor spaces determines the daily routine, spending time outside of the home, sociability, independence, and most significantly mental wellbeing (Kim, 2010; Kloos & Townley, 2011; Astell-Burt et al., 2013; Thompson, 2013). From the urban design perspective, pavements should be free of barriers; however, climate impacts require pavements to be permeable to avoid any danger in the case of heavy rain. Green areas, parks, and green streets are important components of a cluster that both increase the ratio of permeable surfaces and provide shade to decrease the UHI effect. In addition to cooling centres, passive cooling measures (green walls and roofs, high-albedo surfaces, urban geometry, and wind corridors) decrease energy demand and support higher comfort both indoors and outdoors (Milan & Creutzig, 2015; Aram et al., 2019). The must-haves of the living environment are public toilets, shade, safety, and less traffic (McGarry & Morris, 2011; Dikken et al., 2020; Garner & Holland, 2020; Bayar & Türkoğlu, 2021).

Housing considers the qualifications of the house where older adults spent most of their time in terms of affordability, accessibility, comfort, design, and compatibility. The design of houses should meet the spatial needs of older adults such as barrier-free entrances, easy access to apartments, and lifting options (Burby & Rohe, 1990; Tinker, 1997). Another important issue from the climate change mitigation perspective is the energy used within the house, especially for heating and cooling. For example, using coal for heating causes multiple problems such as air pollution and GHG emissions, and it has a high risk for older adults (Kerimray et al., 2017). Renewable energy systems and energy-efficient design such as using high-albedo materials for the facade and roof to prevent overheating and aid insulation are both environmentally and budget-friendly (Milan & Creutzig, 2015).

7 Discussion

This article is based on the idea of developing a climate-responsive age-friendly city. The importance of this issue arises from two major situations that have been faced globally: the ageing population and climate change. The uneven distribution of climate stressors creates disproportionate impacts on cities and populations. Although cities act against climate change, the question of who will suffer more from climate stressors remains unanswered, which creates climate injustice in society. The social vulnerability of certain groups in society is associated with income level, sex, ethnicity, age, and civil society (Lynn et al., 2011). On the other hand, the vulnerability of those groups and injustice is either exacerbated or calmed by climate change actions and plans regarding the specific needs of the populations (Fothergill & Peek, 2004). Therefore, claiming that climate change actions need to be specified according to certain vulnerable groups, this study focuses on older adults' disproportionate vulnerability to climate change effects in urban areas (Antal & Bhutani, 2022). Scaling is the supportive argument of the bottom-up approach of this study. Three main scales that gradually affect older adults, but also directly from every perspective (the neighbourhood scale, the city scale, and the housing cluster) are linked to related climate actions, urban policies, and age-friendly topics.

The housing cluster is the immediate living environment for older adults and it is important due to depending on facilities and social life in a close setting. Time spent in the urban environment, emotional attachment to a place, local social networks, and feeling safe and secure in a familiar environment are the greatest supports for older adults as well as ageing in place (Buffel et al., 2012b). To support this, the cluster should provide a safe, comfortable, and affordable living environment in the face of climate change. Buildings are responsible for 30%

of final energy consumption and 27% of total GHG emissions (IEA, 2022). Actions on promoting energy efficiency, using renewable energy, and increasing thermal comfort through material choice, housing design, and urban design contribute to the economy, the environment, and the wellbeing of older adults (Stephens & Allen, 2022; Wellecke et al., 2022)

It is well known that older adults spend most of their time in the neighbourhood they live in. Therefore, infrastructure, land use, and facilities have a significant impact on their wellbeing and independence. Efficient, affordable, accessible, and supportive public transportation increases their mobility and social interactivity while promoting their independent social activities (Booth et al., 2000; Khosravi et al., 2015). On the other hand, enhancing public transportation is a significant urban strategy in climate change mitigation and adaptation actions that also has positive impacts on older adults' health. Generating 33% of total urban GHG emissions, transportation is one of the major emission contributors and the fastest-growing sector in urban regions (OECD, 2020). Promoting reliable, comfortable, and accessible public transportation decreases the demand for automobiles, increases air quality, and eliminates traffic-induced air pollution (Sun et al., 2019). Industrial areas, highways, and waste-disposal areas are sources of both air pollution and emissions (Guttikunda et al., 2014) that should be located away from vulnerable groups' residential areas. Urban ventilation and integration of natural areas into urban settlements are other factors that affect not only air quality by hindering the accumulation of pollutants (Kurppa et al., 2018) but also by providing a natural cooling effect to eliminate the UHI effect (Gago et al., 2013).

The city scale revolves around factors that are concerns of society, systems, and government. Disseminating information and a well-functioning healthcare system are top priorities for coping with climate change and the ageing population due to older adults' dependency on healthcare services, which is expected to be increased by climate-related disasters and adverse health impacts. To develop a climate-responsive city, the increasing demand in an emergency should be considered to reduce the burden on the healthcare system. Because inequality in healthcare is associated with sociodemographic indicators such as poverty, education level, and lifestyle, enhancing the healthcare system should cover a more comprehensive perspective (Marmot & Bell, 2013). Local enhancements to support active ageing, a safe environment, and ageing in place contribute to the health and wellbeing of older adults and reduce the economic pressure on the healthcare system (Allen & Glasby, 2010; Darton, 2022). The WHO (2007) advises the integration of older adults into society and enhancing the participation of older adults into social activities to cope with isolation and loneliness. Creating an information network through com-

munities and policymakers is the greatest way to support this aim. Delivering the right information on campaigns, policies, and easy access to activities, and integrating older adults into volunteer work, are also essential to the quality of life, active ageing, and involvement in decision-making processes (Nazroo & Matthews, 2012). Disseminating information and warnings about climate change risks, precautions against disasters, and emerging impacts saves the lives of vulnerable people.

This study builds a bridge between the two most important challenges of the twenty-first century and provides a guide for future urban development. In addition, it can serve as a starting point for developing climate resilience so that cities can develop plans to address climate risks and vulnerabilities and ensure that they are inclusive of older adults. The three scales focus on different urban environments; however, they also connect with each other. To avoid overlap and repetition, spatial responses should be in line with policy planning regarding diversity in older adults. A limitation of this study is that the critical literature review is limited to English literature that is available online. Moreover, despite this study's comprehensive framework, it defines older adults as a homogenous group and does not focus on their specific needs based on sex, sociological background, or economic conditions.

Future studies need to test the domains on an empirical case study using both qualitative and quantitative research methods and support the theoretical framework with quantitative data analysis in the three scales of the study. Because the data on climate change mainly refer to the regional scale, the local data required by such a study need to be collected using specific methods. This framework can also be organized and evaluated for different city scales such as metropolitan cities or rural areas. Moreover, more detailed research can include the diverse identities and needs of older adults by focusing on heterogeneity.

8 Conclusion

Considering climate change exposure and its impacts on the health of older adults, urban planning strategies and actions need to focus on increasing indoor and outdoor thermal comfort and air quality, energy management, risk management, and safety on enhancing healthcare systems, and on integrating environmental concerns and solutions into urban settlements. This article has presented the importance of climate responsiveness while creating age-friendly cities from the perspective of climate and social justice. Population ageing and climate change are two inevitable and irreversible scenarios for the future of cities. Therefore, it is important to integrate these two dimensions into one to create more sustainable, resilient,

and healthy cities. This study highlights the crucial domains for climate-responsive age-friendly cities through a critical review of the literature and provides a practical checklist for local governments.

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UDC: 338.484:502.131.1

doi:10.5379/urbani-izziv-en-2023-34-01-02

Received: 8 November 2022

Accepted: 27 March 2023

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Evolving mass tourism constructs and capitalist exploitation of the coast: From sustainable density and urban morphology to iconic megastructure

The tourism construct is a disruptive capitalist production of space that has generated and is generating new urban forms. Many architectural and morphological studies have specifically analysed its different models, but there is a lack of studies comparing their features. This comparative study examines four types of tourism construct related to the evolution of capitalism (including pre-Fordism, Fordism, and post-Fordism) and different types of tourist cities. Architectural iconicity, morphological patterns, and spatial metrics are analysed in relation to the economic, social, and cultural characteristics generated. The results suggest that high-density pre-Fordist and Fordist

tourism constructs facilitate social relations and a greater capacity to generate the city, whereas lower-density post-Fordist constructs have higher environmental costs (an increase in private green areas and bodies of water) and social costs due to architectural iconicity. The article assesses the relationship between the architectural and urban variables to be considered in the planning tourist destinations in the capitalist production of tourist space.

Keywords: coastal tourism, iconic architectures, morphology

1 Introduction

Tourism has traditionally been identified as an expression of the capitalist economy (Fletcher et al., 2021). The widespread triumph of the capitalist model seems to preclude the development of a socially balanced and sustainable model (Charley, 2010), as well as the protection of the most basic collective goods (Hollerman, 2015). Gauthier (2005) defines the differentiated tourism architecture and morphology as constructs. The tourism construct is the result of high-speed change linked to a greater level of disruptive development and experimentation. According to Knafo and Stock (2003), tourism is a system in which individuals must travel, they temporarily live in places outside their usual routine, and space actively participates in tourists' leisure and recreation. Therefore, the tourism construct is a spatial and physical response to the sum of three basic characteristics of tourist activity: the need for a means of transport, an event or experience as a reason to travel, and an accommodation system.

Mobility drives tourist relations (Coles et al., 2005; Urry & Larsen, 2012; Nebot-Gomez de Salazar, 2020) and has had a strong impact on climate change (Gühnemann et al., 2021), even during the COVID-19 pandemic (Yang et al., 2021). Tourist developments are places where space loses its strategic status and robust nature in a progressive dissolution process (Sparke et al., 2018), inhabited by a constant flow of temporary visitors and an ongoing need to reinvent their experiences to avoid obsolescence processes (Sanabria Díaz et al., 2020). The pressure of urbanization and tourism in coastal areas has increased with high impacts and changes to their landscapes (Petrișor et al., 2020). Specifically, the dynamic nature of tourism has generated new urban morphology, particularly along the coasts – consisting of autonomous elements – where open space basically consists of lawns and playgrounds (Levy, 1999). Capitalism's influence on the tourist space is clear in its activities and architecture. Tourist events are perfect capitalist productions because they consume places and produce meanings (Nogués, 2008). Events can directly influence the character of the city and its ability to attract tourists (Li et al., 2021). In turn, tourist architecture for accommodation is an international expression of the Western capitalist economy and an exponent of mass consumer culture and modern life (Britton, 1991).

Tourism is therefore an organized capitalist activity with socially and ideologically intentional spatial production (Britton, 1991). Currently, numerous forms of capitalist production of tourist space coexist: Fordist tourism models survive in peripheral areas – for example, Cancun (Torres, 2002) – and there are also hyper-iconic post-Fordist complexes – for example,

Dubai (Elsheshtawy, 2010); restructured pre-Fordist tourist centres – for example, the United Kingdom (Agarwal, 2012); or Fordist tourist centres in the Spanish Mediterranean (Antón Clavé et al., 2011). Numerous studies have analysed the various constructs of tourism in depth. Previous research into their morphological evolution related to political, economic, social, environmental, and physical variables has been conducted, including the spa (Agarwal, 2012; Xie et al., 2013), beach resorts such as those in the the Asia–Pacific region (Smith, 1991, 1992), Greece (Andriotis, 2006), or Mediterranean towns (Lekakis & Chatzikonstantinou, 2020). However, there is a significant lack of studies comparing the main tourism constructs of each capitalist period using a morphological and architectural analysis and their social and environmental consequences.

This article compares characteristic examples of tourism constructs developed by capitalism for coastal tourism – in terms of architecture, morphology, and spatial metrics – and analyses their social segregation and environmental effects (density and percentages of water and green areas). The article is organized as follows. After the introduction, the second section develops a methodology that analyses and compares the evolution of five selected constructs in terms of architectural, morphological, and spatial metrics characteristics and in relation to the evolution of capitalism. The third section briefly summarizes the relationship between architecture and the different periods of the capitalist economy. In the fourth section, the results show that the selected pre-Fordist and Fordist constructs have more sustainable densities, whereas the post-Fordist models have a greater environmental impact, social segregation, and iconic burden. The fifth section discusses the relationship between the architectural iconographic parameters and the morphological and spatial metrics characteristics. Finally, the conclusions and limitations of the study are considered in the sixth section.

2 Methodology and case studies

Levy (1999) considers two main approaches to studying urban form, focusing on the relationship between types of buildings and urban fabric, and the evolution of the tourism construct. Both are analysed in this article by comparing five case studies. The comparison was conducted from a socioeconomic dimension (capitalism and architecture) and from a physical dimension (morphology and the spatial metrics). The socioeconomic dimension considers the built environment as a direct expression of culture; in other words, it is a social construction both in its creation and in its evolution (Gauthier, 2005), and it influences the integration of residents and tourists (Soszyński et al., 2017). A bibliographic review was conducted for each economic period, along with a description of the architecture

Table 1: Relationship between selected morphological layers and parameters.

| | | Parameter | | Morphology | |
|--------|--------------------|----------------|-------------------------------|------------|-----------------------|
| Symbol | Description | Unit | Relation | Symbol | Layer |
| A | Road area | m ² | $A + B = 100,000 \text{ m}^2$ | ST | Street |
| B | Private plot area | m ² | $B = B1 + B2 + B3 + B4$ | | – |
| B1 | Ground floor area | m ² | | GL | Ground-level building |
| B2 | Private space area | m ² | | PS | Private space area |
| B3 | Private water area | m ² | | WA | Water area |
| B4 | Private beach area | m ² | | | Beach area |
| H | Maximum height | number | | AG | Above-ground building |
| Ba | Built area | m ² | $Ba = B1 \times H$ | | – |
| Ud | Urban density | – | $Ud = Ba / (A + B)$ | | – |

Source: Authors

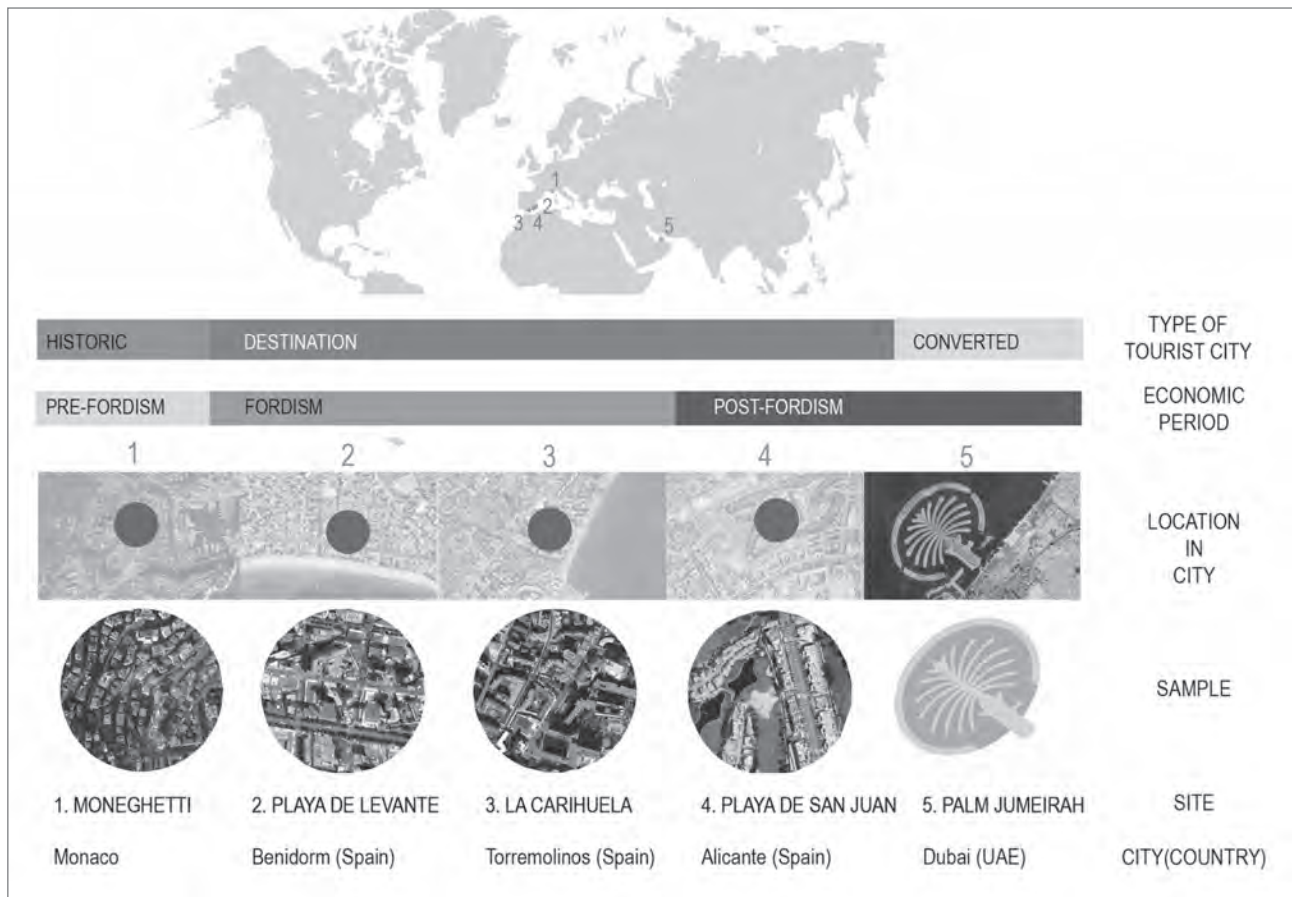


Figure 1: Location of the cases studied and characteristics of each sample (illustration: authors).

and of the economic and architectural thought that influenced its design, to analyse architectural and socioeconomic values.

As regards the physical values, the urban form has been related to the spatial metrics, taken to be “the quantitative measure-

ments that assess the spatial characteristics of the urban structures and settlements” (Reis et al., 2015: 330). These metrics identify the spatial components in the dynamics of the change (Herold et al., 2005), the urban patterns of tourist developments (Gkoltsiou & Terkenli, 2012), and the spatial patterns of

tourist coastal areas (Antón Clavé et al., 2011; Rovira Soto & Anton Clavé, 2017). The study compares ten-hectare circular samples of the tourist areas within the first 1 km strip from the coast. Using aerial images and mapping from Google Earth and a GIS programme, six morphological layers are related to nine parameters (Table 1) to analyse the occupancy percentages and the urban density. Urban density (Ud) is considered equal to floor area ratio (FAR) (MIT, 2019), and the built area (Ba) is obtained from the cadastral database as the product of the ground floor area (B_1) times maximum height (H).

The choice of the case studies follows an evolutive time sequence of the three main periods of capitalism (pre-Fordist, Fordist, and post-Fordist) that seeks to highlight significant changes to the tourism construct. Judd and Fainstein (2000) differentiate between three categories of tourist cities: the historical tourist city, the destination city specifically designed for tourism consumption, and the converted city, which builds infrastructure to attract tourism (Figure 1).

The historical tourist city includes the “spa cities” of the nineteenth and twentieth centuries. Along the Mediterranean coast, Monaco is one of the most frequently visited tourist destinations in the world (Gjorgievski et al., 2013) and a classic European destination, similar to Las Vegas in North America, Johannesburg in Africa (Fu & Murray, 2014), or Macao in Asia (Kwan, 2004). A sample of the Moneghetti–La Condamine neighbourhood has been selected.

Within the destination city, in Europe, the explosion of mass tourism during the Fordist capitalism period was significant along the Spanish coast due to its rapid transformation from the 1960s. Three examples of the Spanish Mediterranean coast were selected: Torremolinos, Benidorm, and Alicante. Torremolinos was one of the first tourism developments in Costa del Sol and is a tourist destination widely analysed in the literature (Navarro-Jurado et al., 2019). It is a mature destination, similar to Acapulco (Mexico), where the La Carihuela neighbourhood is a representative sample of its features. Benidorm and its Playa de Levante neighbourhood is the most outstanding mass tourism destination on the Spanish Mediterranean coast (Nolasco-Cirugeda et al., 2020). It is a singular tourism model based on high-density urban development and high-rise buildings. Finally, the Playa de San Juan neighbourhood in Alicante represents the transition to the post-Fordism associated with residential spaces for golf tourism, focused on higher purchasing power and renovation of mature destinations (Ruiz et al., 2016). It is a tourism construct with a more vernacular architectural style and greater development in green areas. In the converted city, Dubai is the paradigm of a post-Fordist neoliberal tourism model. The selected sample of the Palm Jumeirah artificial island is an example of a “tourism bubble”

consisting of convention centres, sports complexes, large congress hotels, and shopping malls with attractions designed exclusively for tourists and which are not used by the local residents (Fainstein, 2005).

3 Tourism constructs and capitalist exploitation of space

3.1 Capitalism and tourism architecture

Each economic period of capitalism has generated its own constructs. The pre-Fordist tourism construct was originally the destination of the upper classes of urban industrial capitalism from the second half of the nineteenth century to the Second World War. It is a winter tourism destination, where the tourist experience was developed in architecture in the form of spas, thermal resorts, and casinos.

The period of Fordist capitalism development (from 1945 to the mid-1970s) plays a key role. After the Second World War, tourism followed the characteristics of industry and Fordist capitalism in response to the growth of mass tourism. Architecture embarked on mass production. This mass production system is based on maximum production at minimum cost by means of creating large volumes of a limited series of standardized products (Watson, 2019). The mass tourism of Fordist capitalism is highly standardized, packaged, and inflexible tourism constructs consumed by large numbers of tourists (Torres, 2002). The democratic opening up to the middle classes and the improvement of salaries allowed workers access to mass consumption of tourist packages. This was all thanks to the Keynesian economic model – particularly adopted in western Europe – with a new capitalist class of transnational companies that embarked on the physical production of the tourist space (Yrigoy, 2014). The transport and accommodation revolution favoured the extensive occupation process of the territory. Aircraft made long-haul tourism possible without the need to develop the road infrastructure. The Grand Hotel gave way to the tourist hotel, designed as a self-contained unit with apartments, a dining room, tropical gardens, a solarium, swimming pools, and entertainment areas. Right from the start, the architects of the Modern Movement included the functionalist ideology of international architecture until the triumph of the Team X ideas in the Languedoc–Rousillon project designed by Candilis, Josic, and Woods (1962–1977).

The transition to the neoliberalism of post-Fordism meant the deregulation and deindustrialization of capitalism, which led to globalized, individualized, and flexible tourism (Bianchi, 2018). The capitalist spontaneous order was replaced by the economic totalitarianism of the financial system at the start of

the twenty-first century. The liberation era covers three decades: from the end of the 1970s to the 2007 global financial crisis (Roberts, 2010). Between 1985 and 1995, the shift was from mass production to mass customization, and the Keynesian model and protectionism was replaced by a Hayekian and neoliberal approach to the economy, globalization, and obsessive competitiveness (Woodley, 2015). Tourism changed radically between 1975 and 2005 due to its intensification and disproportionate growth (Soja, 2005). It was based on the new economy of flexible capitalism and the development of information and telecommunications, which have allowed a time-space compression in the new era of globalization (Harvey, 1990). With the saturation of the Fordist traditional sun-and-beach market, a new type of tourist has emerged, increasingly more gregarious and difficult to classify. These tourists are searching for alternative experiences, which include leisure products, but which come with new motivations to travel as a life experience (Bonet, 2003; Ashworth, 2005).

3.2 Architectures of spectacle

The aim of the Fordist tourism construct is the mass production and exploitation of tourist space, where architects design standardized accommodation architecture dissociated from the production of experiences (Lefebvre, 1974). They end up generating a tourist megalopolis designed for consumption and the outcome of an accumulation of discontinuous, disjointed, and autonomous architectural and urban structures (Gausa, 1996). Antagonistically, the pre-Ford and some post-Ford tourism constructs are based on symbolic and emblematic architecture that helps create an elitist space and hide an existing social reality (Pié-Ninot & Rosa-Jiménez, 2014), where post-modern imagery has turned architecture into an event.

Those architectures of spectacle are consumer goods, or architectural displays that have generated their own “architourism”. The literature distinguishes two trends. The first is architecture focused on the identity of the place (Figure 2a) and which strengthens its meaning (Lasansky & McLaren, 2004); in other words, non-iconic buildings of vernacular architectural styles to authentically experience a place (Chang, 2010), and to boost tourism and local development (Palupi et al., 2021). At the other extreme is hyper-iconic architecture; that is, “disneyfication” and thematic resorts (Figure 2b), which have transformed the tourist metropolis into a tourist utopia: “enclaves within the state that constitute another post-industrial reterritorialization of urban forms, constructed by international capital to attract workers and non-local tourists” (Simpson, 2016: 28). These places are already related to an “intensification” economic rationale that relies on the speculative circulation of capital, without the resource of production of goods (Nealon, 2002).

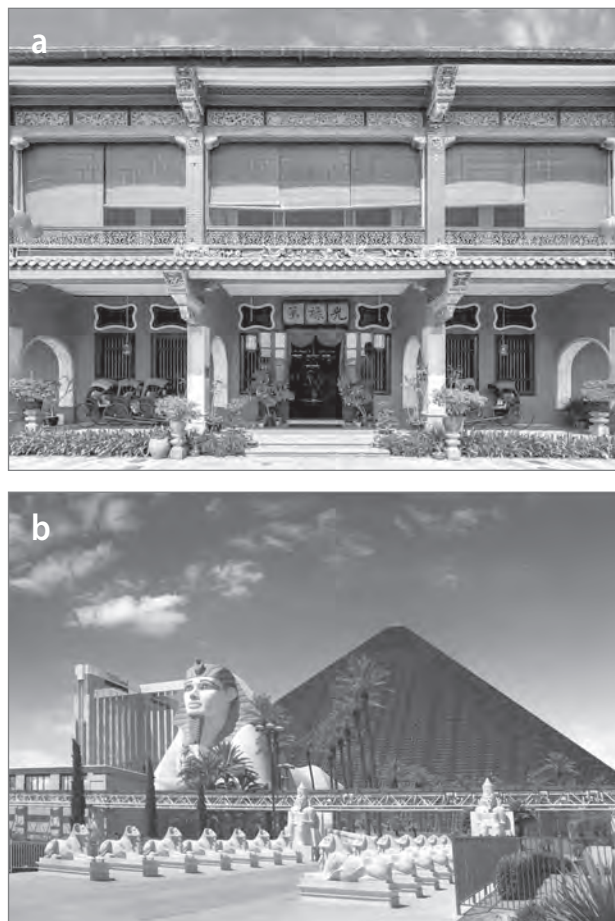


Figure 2: a) Cheong Fatt Tze Mansion (Malaysia) as an example of non-iconic buildings of vernacular architectural styles; b) Luxor Hotel in Las Vegas as an example of hyper-iconic architecture (photo: Alberto E. García-Moreno).

Harvey (2005) criticizes the fact that the strategies of neoliberalism have been designed to restore the class powers of the elites against the working class since the 1970s, thus generating wealth and poverty simultaneously. It is associated with the “scintillant cities” concept (Simpson, 2013) as an example of connection of glass architecture, enclave urban development, financial capital, and fictions. They are cities made up of iconic architecture. Sklair (2006) defines iconic architecture as that which is famous and has a special symbolic or aesthetic meaning. The transnational neoliberal capitalist class, as the dominant force, drove the iconic architecture, instead of the state and religion, of the 1960s (Sklair, 2010). “Celebrity architects” with internationally renowned firms were therefore contracted to guarantee the value of the investments (Larson, 1995). The connection between iconic architecture and architects with globalization is the result of information and communication technologies and computing, which has allowed them to design buildings in “impossible” forms (Sklair, 2010).

Table 2: Summary of the main characteristics of each type of tourism construct.

| Type | Period | Site | Urban density | Iconicity | Pattern | Morphology |
|------|--------------|----------------------------------|---------------|-------------------------------|--------------|---------------|
| 1 | Pre-Fordism | Moneghetti | High | High (eclecticism) | Urban fabric | Urban |
| 2 | Fordism | Playa de Levante La Carihuela | Medium | Low (rationalism) | Urban fabric | Expansion |
| 3 | Post-Fordism | Playa de San Juan | Medium-low | Low (vernacular) | Urban fabric | Suburban |
| 4 | | Palm Jumeirah | Low | High (architecture-spectacle) | Icon-fabric | Megastructure |

Source: Authors

4 From urban morphology to iconic megastructure

The results of the comparison of the socioeconomic dimension of Section 3 with the physical dimension (morphology and spatial metrics) suggest four types of tourism constructs associated to four morphological types or urban patterns, which we have called urban, expansion, suburban, and megastructure (Table 2 and Figure 3). They present differentiated qualities as regards the urban density, iconicity, and type of urban pattern, in which an evolution from urban rationale to the tourist megastructure can be detected.

4.1 Types of tourism constructs

Type 1: Industrial capitalism and the eclectic construct. Monaco's casino-based economic activity attracted tourists with high purchasing power in an area of poor and rocky terrain (Gay, 1998). The main impact of that economy was the socio-spatial segregation that drove the social expulsion of activities and people not in keeping with high social status (Pié-Ninot & Rosa-Jiménez, 2014). In Monaco, the urban industrial capitalism formula of tourist colonization, used by the British Empire in its colonies, was deployed: grand hotels built by travel agencies or by consortia with stakes in the transport systems and designed by European architects in an eclectic neo-classical style (Wharton, 1999). Thus, following the building of the railway (1863), the opening of the Grand Hotel de Paris (1864) led to the appearance of elite amenities such as the Monte Carlo Casino and its adjoining opera house, the work of Charles Garnier, the eclectic architect that went on the Grand Tour between 1852 and 1855. The territorial constraints of Monaco have transformed the initial residential villas into a contemporary high-density urban space, following a vertical and horizontal filling-in process. The streets there adapt to the steep relief of the land and occupy a very important percentage of the area,

whereas the free area of the plots is relatively low, with no swimming pools.

Type 2: Fordist capitalism and the international architecture construct. This model allowed the rapid transformation of the coast, but the mass growth and the economic vision generated significant impacts on the landscape values that are, paradoxically, the lure of tourism (Pié-Ninot & Rosa-Jiménez, 2014). The Benidorm (Playa) and Torremolinos samples share the same morphological pattern of hotels and residential complexes with private free areas for leisure programmes. Smaller roadways benefit the size of the block and the inclusion of swimming pools with ever larger water areas. In those Fordist fabrics, the main problem is the physical obsolescence of the spaces created in the boom of the 1960s and the dwindling of a simple and trivial culture product that does not meet the needs of the new tourist (Ashworth, 2005).

Type 3: The post-Fordist transition and the vernacular construct. The epicentre of the structure of the post-Fordist tourist space is the airport, which has become a hub and micro-city due to the remarkable growth in the use of the airplane (particularly low cost) as a means of transport (Soja, 2005). That has driven the blurring of the line between the urban and the suburban, and the development of the suburbanization as a growth model of the second holiday home. The Playa de San Juan tourism construct (Alicante, Spain) includes a significant increase of the plot and of private free space to include the golf course. Furthermore, it has increased the water area by introducing artificial lakes and swimming pools in low-density residential complexes, which may even include a larger length of artificial beach rather than natural beach (Rosa-Jiménez et al., 2016). The drop in urban density in tourist residential complexes, along with the recovery of the local-roots architectural style, led to a trivialization of cultural styles and images.

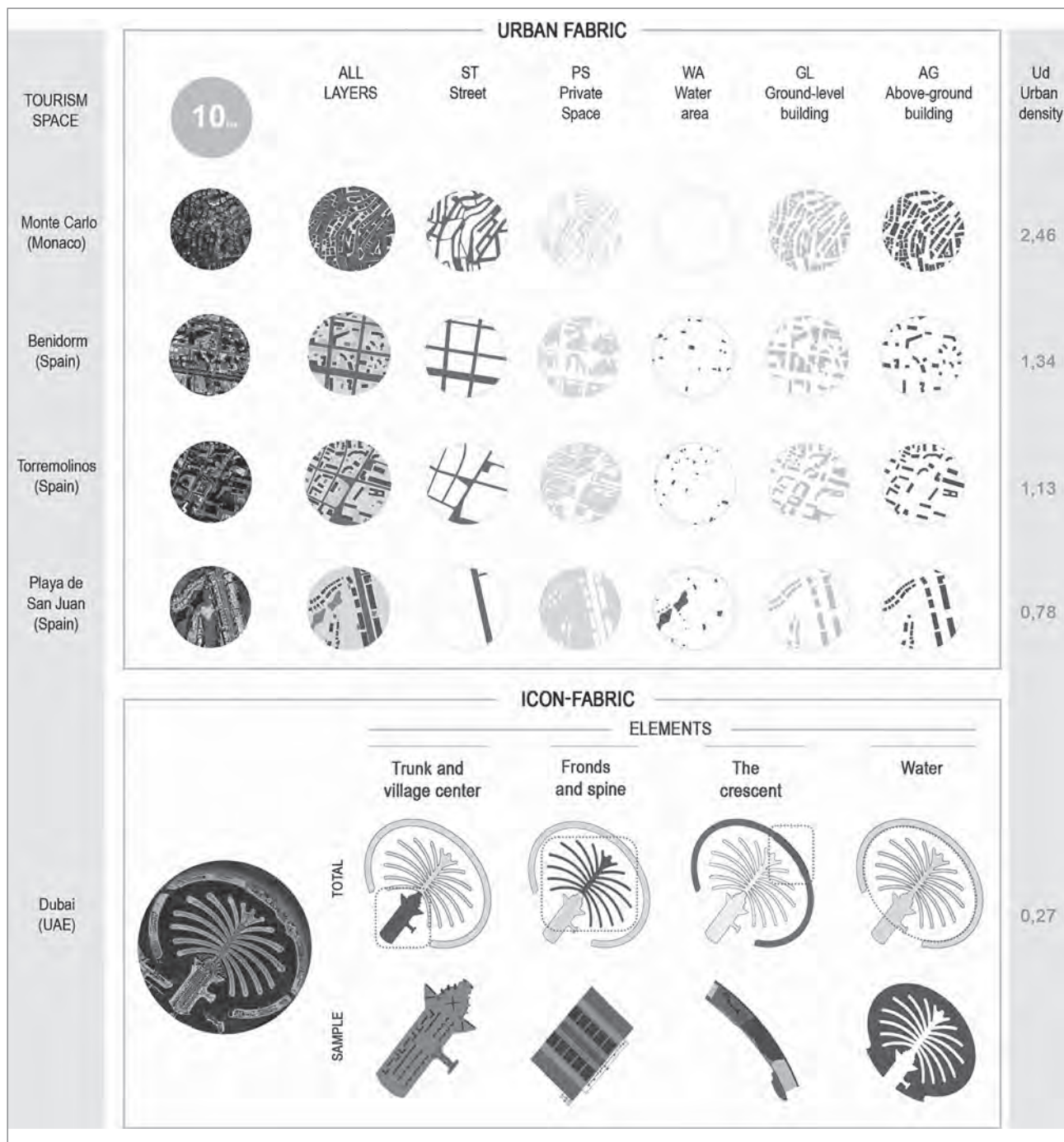


Figure 3: Urban densities and morphology features of each case study (illustration: authors).

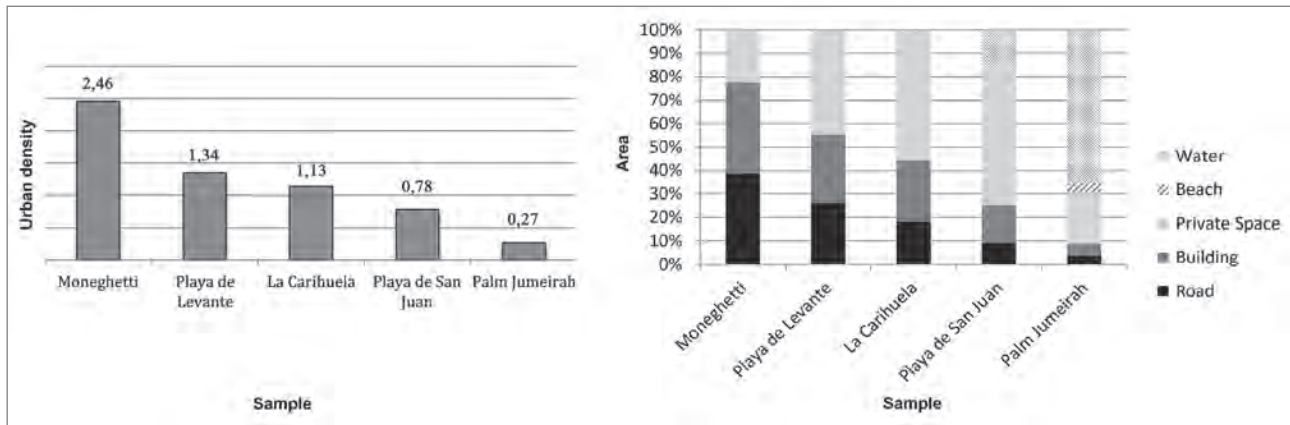
Type 4: Post-Fordist capitalism and the iconic megastructure. The Dubai model is similar to others of East Asia (China, South Korea, or Taiwan) analysed by Jeon (1995). Dubai’s urban development is an example of neoliberal economic policies that seek to attract top-tier tourism and foreign investments and exclude the immigrant and local population. Dubai is a model based on the power of spectacles (Elsheshtawy, 2010), which develops skyscrapers, shopping malls, and high infrastructure that are out of context with their settings. Further-

more, it exploits and marginalizes its immigrant construction workers (Ghaemi, 2006) and those with precarious livelihoods (Gibson, 2009). The megaproject to transform Dubai’s sea-front expands its coastal land from 45 to over 1,500 kilometres. It comprises Palm Deira, Palm Jebel Ali, The World Islands, The Universe, and the Waterfront City project, designed by OMA to be home to up to 1.5 million people (Velegrinis & Katodrytis, 2015). Palm Jumeirah Island (2008) is the smallest of the three Palm Islands and is home to over twenty-five

Table 3: Urban parameters of each tourism construct

| Sample | T | A | B | | | | Maximum height | Built area | Density unit | |
|-------------------|---|--------|-------------------|-------------------|----------------------|----------------------|----------------|------------|--------------|----------------------|
| | | | (m ²) | (m ²) | B1 (m ²) | B2 (m ²) | | | | B3 (m ²) |
| Moneghetti | 1 | 38,695 | 61,305 | 38,690 | 22,615 | 0 | 0 | 14 | 245,730 | 2.46 |
| Playa de Levante | 2 | 26,186 | 73,814 | 29,045 | 41,844 | 2,925 | 0 | 29 | 134,252 | 1.34 |
| La Carihuela | 2 | 18,203 | 81,797 | 26,069 | 43,670 | 2,058 | 0 | 13 | 113,152 | 1.13 |
| Playa de San Juan | 3 | 9,258 | 90,742 | 15,967 | 58,498 | 16,277 | 0 | 6 | 77,637 | 0.78 |
| Palm Jumeirah | 4 | 3,718 | 96,282 | 5,128 | 21,894 | 65,441 | 3,819 | 21 | 27,027 | 0.27 |

Note: T = type, A = road communications, B = private area, B1 = building, B2 = private space, B3 = water, B4 = beach. Source: Authors.

**Figure 4:** Urban density (left) and percentages of land use (right) for each tourism construct (illustration: authors).

international hotels, such as the Atlantis Dubai Hotel, with 1,500 rooms, an aquarium, and a theme park. The iconic design of the palm tree creates a form in which the trunk is the centre of the complex, consisting of apartments, hotels, and attractions, and the seventeen branches make up a residential group of villas and homes with private beaches. The crescent is a semi-circular artificial island with tourist amenities.

4.2 Urban density and physical exploitation of space

In Table 3, a drop in the urban density of the fabrics is detected in the evolution of the tourism construct, from the inherent values of the compact city in Monaco ($U_d > 2$) to the low levels of the golf residential complexes. The average density near 1 of the Fordist fabrics (Type 2) allows a complex programme of free zones and swimming pools to be developed. The drop in density of the Type 3 (average density around 0.5) and Type 4 (low density of 0.25) constructs leads to a progressive reduction of the road area and of the area occupied by buildings in favour of greater private free space, water, and private beaches, which is particularly obvious in the Palm Jumeirah megastructure (Table 3 and Figure 4). The construction of the Palm Jumeirah artificial island involved a major engineering project with an environmental impact affecting

the ecosystem of the Persian Gulf (Sale et al., 2011). In this regard, this increase in private free space in the post-Fordist constructs is accompanied by social segregation as the result of land privatization (gated communities); the increase in the green landscape and swimming pools is associated with environmental costs of high water consumption (Gössling et al., 2012; Hof & Blázquez-Salom, 2015).

4.3 Iconicity as social exploitation of space

According to Sklair (2010), the development of iconicity in architecture has fostered the segregation and social exploitation of space. At an initial level, the Fordist construct (Type 2), aimed at the middle and lower-middle class, first adopted the principles of the architecture of the Modernist movement. Sun and beach as the main tourist experience was architecture with a reduced iconographic value and that acted as accommodation support infrastructure. At a second level, the architecture of the Type 3 constructs, particularly from the 1970s, included vernacular architectural styles to experiment with or recover the place (Chang, 2010), which were already used by the jet-set in highly elitist destinations such as Marbella (Spain) or Port Grimaud (France). Finally, at a third level, constructs 1 and 4, linked to iconography and the architectural style, likewise share international architecture and are aimed at the capitalist

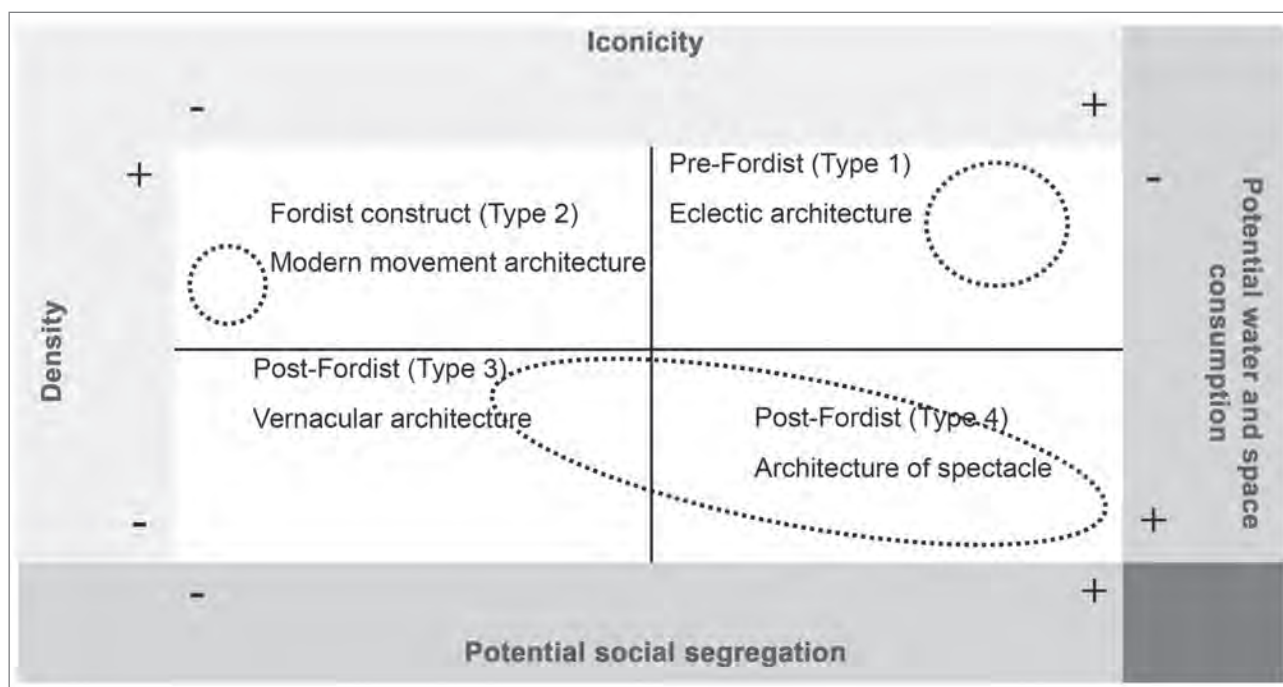


Figure 5: Relationship between the tourism constructs studied with potential social and environmental effects (illustration: authors).

elite that fosters spatial segregation and the “exclusivity” of power that lies within. However, whereas Dubai is a converted city radicalizing urban and architectural iconography aimed at capital flows and the liquid quality of the “scintillant cities” (Simpson, 2016), Monaco has a “solid” urban character and architecture in terms of urban density, which facilitates social city growth.

4.4 Urban patterns and new icon-fabrics

This quality of the architectural iconography has also shifted to urban fabrics in the form of icon-fabrics, with Palm Jumeirah being an exceptional example. The icon-fabric is the design of an urban layout as an iconographic object where there is a dismantling between architecture and urban development, typical of the megastructure concept. Whereas Types 1, 2, and 3 are traditional and open urban fabrics, insofar as they can spread in the territory while maintaining their characteristics, the icon-fabric of Type 4 is closed and can only be reproduced with formal and/or size variations. It clearly meets the tourist bubble idea developed by Fainstein (2005).

5 Discussion

The comparison in terms of architecture, morphology, and spatial metrics of the four characteristic examples of tourist constructs developed by capitalism for coastal tourism, and the analysis of their social effect (social segregation) and environmental effects (density and percentages of water and open

areas) are shown in Figure 4. The study clearly shows the capacity of the capitalist tourism industry to adapt to all urban fabrics and even transgress traditional urban models with the development of tourism megastructure. However, the social and environmental consequences are very different in each of them.

The Palm Jumeirah post-Fordist tourist construct is the maximum expression of urban-architectural iconography and supposes maximum social and spatial exploitation. The Palm Jumeirah megastructure represents a new standard to be incorporated into the four spatial patterns of urban grow defined by Reis et al. (2016): expansion, urban sprawl, polycentrism, and densification/coalescence. Thus, the post-Fordist model of the Dubai tourist megastructures has been a turning point because iconographic patterns have been created that do not meet urban patterns, and the social and environmental impacts generated there have reached dramatic levels. Palm Jumeirah Island has been replicated in other Global South countries such as the Melaka Gateway (Malaysia) – an object of social protests (Arnez, 2022) – or Pearl Island (Qatar), which has led authors to call them predatory cities; that is, selfish and megalomaniac utopias that allow the exploitation of models of architecture and human labour (Rizzo, 2019). However, there is an influence of these predatory logics supported by oil tycoons on the Mediterranean Coast, especially in the new reconfiguration or expansion of marinas or the construction of new hotels similar to the sail-shaped building of Dubai, the Burj Al Arab, on the Costa del Sol (Navarro-Jurado et al., 2019).

A higher density of buildings for the same number of tourists suggests less occupation and exploitation of the space, especially if they have a balanced distribution of water and green areas. According to Gaffron et al. (2005), sustainable cities are characterized by having a medium height and a medium-high building density, between 0.8 and 3.0. Type 1 and Type 2 comply with those densities, particularly the Type 2 ones, which have an average density that allows optimum fabrics to be created to develop qualified private free spaces, regarding the water area and maintaining green areas. Low densities, as is the case in Type 3, and especially in golf courses, increase water consumption and the privatization of space, and risks for the future integrity of local socio-ecological systems (Briassoulis, 2007), but it seems that they are directed more toward real estate products than toward active and dynamic tourist destinations (Del Campo Gomis et al., 2006).

High-density constructs potentially prevent social segregation. Density is also indicative of urban quality or transformation potential, as can be seen in the case of Monaco, where the evolution from a spa city model (similar to Type 3) toward high urban density has allowed sustainable development based on citizen participation. D’Hauteserre (2005: 308) concludes that “Monaco’s practices demonstrate its pragmatic adaptation to global environmental, economic and cultural systems and a realistic application of sustainability principles. Monaco’s leadership has applied, when possible, ‘human-centred sustainable development.’” Monaco shows that high density is also a symbol of high purchasing power. In contrast, the model of Dubai, and particularly of the islands, can only find a potential for urban recovery and social cohesion by examining the parts of the city that generate life outside the “spectacle city” (Elsheshtawy, 2010).

The pre-Fordist tourism construct of density > 1 (Type 1) and the Fordist tourism constructs of density 1 (Type 2) are a reasonable option for mass tourism in terms of morphology and spatial patterns. In both cases, architecture plays a crucial role in the construction of the tourist event itself because of the iconic capacity of the building as an element to generate tourism (Scerri et al., 2019). In the first case, the scant amount of green areas and water requires the existence of iconic architectures; in this regard, many historic centres have carried out recovery policies of cultural heritage for its regeneration (Richards, 2011) through the transformation of monuments into cultural icons. In the second case, the Fordist tourist megalopolis’s great ability to restructure (Gausa, 1996) allows its renovation against obsolescence through the design of iconographic urban projects, as has been the case in Benidorm, where its urban design projects have created an attractive and efficient tourist city (Nolasco-Cirugeda et al., 2020).

6 Conclusion

Even though Charley (2010) does not believe that capitalist economic development is sustainable, a comparative study of the various capitalist constructs throughout history suggests that planning should consider the value of building density accompanied by a balanced distribution of water and green areas, along with a balanced arrangement of iconic architectures. However, transformations of waterfronts with iconic morphological patterns should be avoided.

In addition to the pre-Fordist constructs, which benefit from their urban status, the Fordist construct of densities close to 1 is a balanced model for mass tourism because it allows for an adequate amount of green areas and swimming pools with a reasonable distribution. Nonetheless, the Fordist construction processes were guided by principles of standardization and economy. Therefore, they generated a construct considered rather more an accommodation infrastructure than the iconographic value of its architecture and construction of the landscape. The main drawback is the poor quality of its landscape because socially they were products designed for access by the majority of the population, with less social segregation. The required conversion of the destination would be midway between two revitalization trends. On the one hand, the temptation is to evolve as post-Fordist tourism constructs, with the danger of environmental and social impacts. On the other hand, increasing the number of architectures of spectacle plays a key role in the construction of an always vibrant and lively destination.

This research has limitations particularly in terms of representativeness of the selected case studies. The models studied are just a sample of a broad spectrum of urban morphologies and architectures. Even though they are representative models of each phase of the evolution of capitalism, we cannot generalize the results of the research to other geographical areas. Future research should focus on comparative studies of each period of capitalism by expanding the number of case studies. Along these lines, it would be interesting to analyse the tourism constructs of the world’s sun and beach tourism areas in order to be able to assess the impacts they have suffered in their evolutionary process.

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Acknowledgements

This article presents some of the findings of the research project Residence and Residential Tourism: Processes and Conflicts (CSO2013-48155-P), funded by the Ministry of the Economy, Industry, and Competitiveness (Spain). The authors are grateful to anonymous reviewers, whose helpful remarks on previous drafts provided important inputs for the final version of this article.

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UDC: 72:7.035.93(477Poltava)
doi:10.5379/urbani-izziv-en-2023-34-01-03

Received: 1 March 2023
Accepted: 26 April 2023

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National character in Poltava architecture of the beginning of the twentieth century

Ukrainian Art Nouveau is considered in the context of the pan-European development of Art Nouveau in the architecture of the late nineteenth and early twentieth centuries. This stylistic direction is a demonstration of the self-identification of nations. It is hypothesized that the development of Ukrainian Art Nouveau in the architecture of Poltava at the beginning of the twentieth century expresses the identity of the place and national identification of the population, and is a reflection of national consciousness through architecture. This article defines and illustrates the special features of Ukrainian Art Nouveau as a manifestation of national character in the architecture of Poltava at the beginning of the twentieth century. The research was conducted using a cultural

studies approach in the context of the general cultural development of the city. The general characteristics of the stylistic development of Poltava architecture at the beginning of the twentieth century are presented, and the place of Ukrainian Art Nouveau in the polystylism of the research period is revealed. The influence of Ukrainian Art Nouveau from the beginning of the twentieth century on the further development of Poltava architecture is analysed.

Keywords: Ukrainian Art Nouveau, place identity, polystylism, national traditions, patterns of folk architecture forms

1 Introduction

The Art Nouveau of the late nineteenth and early twentieth centuries had its individual features in each country where it developed. The common unifying feature of these regional trends was the expression of national architectural features. They were manifested in the use of traditional forms, materials, compositional means, and ornaments inherent in folk architecture. Based on its ideological content, Art Nouveau was opposed to symbolic (e.g., Secession, Liberty, and Jugendstil) and Rationalist directions in the architecture of the late nineteenth and early twentieth centuries, which sought to create a global style. The desire for identity in different European countries was caused by different socio-political factors. Thus, the northern Art Nouveau of northern Germany expressed the desire for national unification. In Sweden and Norway, Art Nouveau asserted national traditions. In Finland and the Baltic countries, it expressed its originality and desire for independence from the Russian Empire (Antoshchuk, 2018).

The expression of national self-consciousness in the development of Art Nouveau took place through the revival of folk traditions in the architecture of Ukraine. Similar processes took place among other nations in the early twentieth century (e.g., in the Baltic countries, Catalonia, Poland, Finland, Slovenia, and Serbia). The search for national identity in architecture and art took place in the context of the search for freedom in these countries (Ovsec, 2006). The most significant factor influencing the cultural development of these eastern European countries was the struggle for political and cultural independence from the Austro-Hungarian and Russian empires, which they were part of. The main centres were in Budapest, Prague, Warsaw, and Krakow. The concepts of western Art Nouveau were brought to Ukraine through the activities of Polish and German cultural centres. Ukrainian romantics strengthened the awareness of the Ukrainian people as a nation with its own history, language, aesthetic and ethical principles, culture, and historical purpose.

The most common term used for Art Nouveau in Ukraine is *Ukrainian architectural modernism* (Chepelyk, 2000). This reflects its parallel chronological development with the Secession, Liberty, and Jugendstil movements. It is similar in compositional and artistic means to these European styles. These means are the unity of external and internal space, a comprehensive approach to solving the whole and details, free planning, the possibility of transforming premises (a characteristic method used in *zemstvo* schools), synthesis of arts in the exterior and interior, decoration in the form of majolica and paintings, heraldry on facades, wood, and stone carvings. Along with this, Ukrainian Art Nouveau is related to Europe-

an Neo-Romantic currents based on the ideology of the Arts and Crafts movement by William Morris. This is manifested in the application of forms of folk architecture and the use of craftsmen's products in decorating buildings. The ideological basis of national revival and identity, used as the basis of the style, indicates that it should be attributed to Art Nouveau. Ukrainian Art Nouveau is closely linked to the mentality of the population. It was consciously formed by the creativity of Ukrainian intellectuals at the beginning of the twentieth century. Their main goal was to express the identification of the Ukrainian nation and the revival of folk traditions through architecture.

The spread of the ideas of Art Nouveau was embodied in various spheres of Ukrainian art at the beginning of the twentieth century. This happened almost simultaneously in different regions of Ukraine (Chepelyk, 2000). The artistic originality and regional features of different parts of the Ukrainian territory were reflected in the activities of regional centres of the spread of Art Nouveau. These centres are Poltava (starting in 1903), Lviv (starting in 1904), Kharkiv (starting in 1909), and Kyiv (starting in 1907), as well as St. Petersburg (starting in 1912), according to the research by Chepelyk (2000). Each of them was distinguished by the originality of architectural and compositional solutions and artistic and decorative techniques.

The place of national style in the architecture of the modern city is an important issue. Ukrainian Art Nouveau, along with other styles, preserves local character, characteristic aesthetics, and morphological features, which prevent the unification and depersonalization of the place (Apostolova-Sossa & Mamedov, 2017). The current political situation in Ukraine has raised national self-awareness and is contributing to the consolidation of the nation. Currently, many representatives of various spheres of culture demonstrate the world heritage of Ukrainian art, its character, and its uniqueness. Issues of national identity are most acute and relevant during times of pressure and the risk of losing independence.

2 Research methodology and stages

This study identifies the special features of the formation and development of Ukrainian Art Nouveau in the general stylistic development of Poltava architecture in the twentieth century and as a manifestation of place identity and national identification. Accordingly, it examines buildings that have special stylistic features reflecting the national style, along with the formation of Ukrainian Art Nouveau and its social significance. The study was carried out using a cultural studies approach. Special methods of architectural research are used: comparative, morphological, compositional, and graphic analyses. The

work also uses general research methods: empirical, general logical, and theoretical. Empirical research methods were used by the authors for measuring and photographing buildings.

According to the cultural approach, Ukrainian Art Nouveau is seen as a manifestation of cultural ideology and the population's mentality. It is based on social and political factors. This is why special attention is paid to the preconditions and factors of style formation. The study is based on the assumption that architecture is a synthesis of the intangible, artistic, and material culture of a certain historical period (Kagan, 1996). Ukrainian Art Nouveau was one of the directions of the stylistic development of Poltava architecture of the early twentieth century in the general polystylism of the era. The development of Ukrainian Art Nouveau in Poltava architecture at the beginning of the twentieth century expresses the identity of the place and national identification of the population. It is a reflection of national consciousness through architecture.

The methodology of the study has a step-by-step implementation. The research process required constant adjustment and verification depending on the results obtained. The re-

search was carried out in five stages. This corresponds to three stages of research: structural and predictive, technological, and verification.

The structural and predictive stage has a preparatory function. Its main task is to identify research objects, and to clarify unstudied or little-studied issues. At this stage, the subject of the research is defined, and the study's aim and objectives are formed. Theoretical and empirical material was collected and generalized, and previous studies were analysed. This stage provided the initial data for the study.

The technological stage involves the direct conduct of the research. It consists of several parts. During material analysis and empirical research on buildings, the information collected was analysed, synthesized, and systematized. The prerequisites and factors for the formation of Art Nouveau in Poltava architecture in the context of the pan-European development are presented. The location of the buildings studied was analysed. A site survey of buildings was carried out, including measurements, serial vision, and graphic representation. The results of this stage form the material base of the research.

Table 1: Review of previous research.

| Subject | Authors | Focus | Purpose |
|---|--|---|--|
| Art Nouveau of northern and eastern Europe, Scandinavia, and the Baltic countries | Anteniške (2006), Grosa (2008, 2012), Hroch (2022), Miller Lane (2000), Omilanowska (1993), Ovsec (2006), Plummer (2012), Sokol (2008), Veress (2013) | Formation factors, development features, characteristic features of Art Nouveau of Scandinavian and Baltic countries, and northern and eastern Europe | Comparing Art Nouveau and its characteristic features |
| Development of Ukraine's architecture at the beginning of the twentieth century | Aseev et al. (1989, 2003), Vechersky (2005), Tymofienko (1989, 2006), Yasievych (1988) | Stylistic development of Ukrainian architecture at the beginning of the twentieth century, formation and development factors of various stylistic directions | Determining the place of Art Nouveau in the general stylistic development of Ukrainian architecture at the beginning of the twentieth century |
| Architecture of Poltava during the study period | Vadimov (1991, 2019), Gladyshev & Tsyurulnyk (1995), Kondel-Perminova (2007), Lebedynskyi (2012), Novoselchuk (2006), Novoselchuk (2022), Osychenko (2006), Tregubov (2012), Shevchenko (2009, 2010), Skibitska & Shuleshko (2016) | Prerequisites and factors of the formation of Poltava architecture at the beginning of the twentieth century, urban planning characteristics, typological, stylistic, and compositional development | Studying the features of stylistic and compositional development, identifying patterns of appearance and development of stylistic directions, characteristics of the urban environment formation, identifying the dependence of stylistic solutions of buildings on functional purpose |
| Ukrainian Art Nouveau | Antoshchuk (2017, 2018), Bozhynskyi (2007), Vitchenko (2018, 2019), Moiseenko (1995), Ivashko (2013), Dyomin & Ivashko (2020), Chepelyk (2000), Shumitskyi (1914), Yasievych (1988) | Emergence and development of Art Nouveau in the architecture of Ukraine, its main features, and special regional features | Studying stylistic features of Ukrainian Art Nouveau and means of identifying character |
| The Poltava school and buildings displaying Ukrainian Art Nouveau | Lehenkyi (2004), Khanko (2002), Chepelyk (2000) | Special regional features of the Poltava Art Nouveau school | Generalizing material from previous studies, identifying unstudied and understudied issues |

Source: Tetiana Savchenko (2023).

The next stage is the systematization of data and putting forward a hypothesis. The special features of Art Nouveau in Poltava architecture were analysed morphologically and compositionally. Characteristic architectural details of the style were defined, and their classification was developed. The research identified the features of national character in the buildings studied.

The verification stage confirms the correctness of the studies conducted and their compliance with the initial objectives. It includes two parts. In verifying the veracity of the assumptions, conclusions are formed regarding the character of national features and their social value. The results obtained form a theoretical basis for the protection and restoration of monuments of Ukrainian Art Nouveau. A comparison of the results obtained with the assumptions and hypothesis makes it possible to evaluate the place's identity through the architectural formation of Art Nouveau. Finally, the current state of the buildings studied is analysed. Their role in the formation of the modern urban environment and influence on the further development of the city's architecture is presented. Possible applications of the results in creating regional features in Poltava's modern architecture are considered.

3 Literature review

The study draws upon works by general historians, local historians, art critics, and other researchers that examine the architecture of Ukraine and Poltava (Table 1).

4 Research

4.1 General characteristics of Poltava architecture at the beginning of the twentieth century

The development of architecture in Poltava in the early twentieth century corresponded to general Ukrainian trends in style. Ukraine's dependence on the Austro-Hungarian and Russian empires, which it was part of, led to the development of architecture related to the architecture of western European cities. This is primarily Secession and eclecticism (Ivashko, 2013). Poltava, together with cities such as Dnipro (then Rus. *Yekaterinoslav*, Ukr. *Katerynoslav*), Sumy, and Myrhorod, belongs to the eastern centre of the Secession movement with its centre in Kharkiv. Compared to Kharkiv, Poltava was a much smaller provincial city, with a lower level of economic and industrial development. Therefore, stylistic innovations were introduced there with a certain delay and were significantly influenced by local traditions.

The brick style became widespread in the architecture of Poltava in the period under study, which was characteristic of provincial cities of the Russian Empire at the time due to economic feasibility. The establishment of brick production contributed to the development of the brick style because the Poltava region is rich in ceramic clays. The production of curved figured bricks was launched, the use of which provided new opportunities for the creation of expressive compositions of facades.



Figure 1: Lashch Revenue House, 1905, Poltava, 19 Gogol Street (Ukr. *vulytsya Hoholya*). An example of decorative romanticism with Rationalist tendencies (illustration: Tetiana Savchenko).

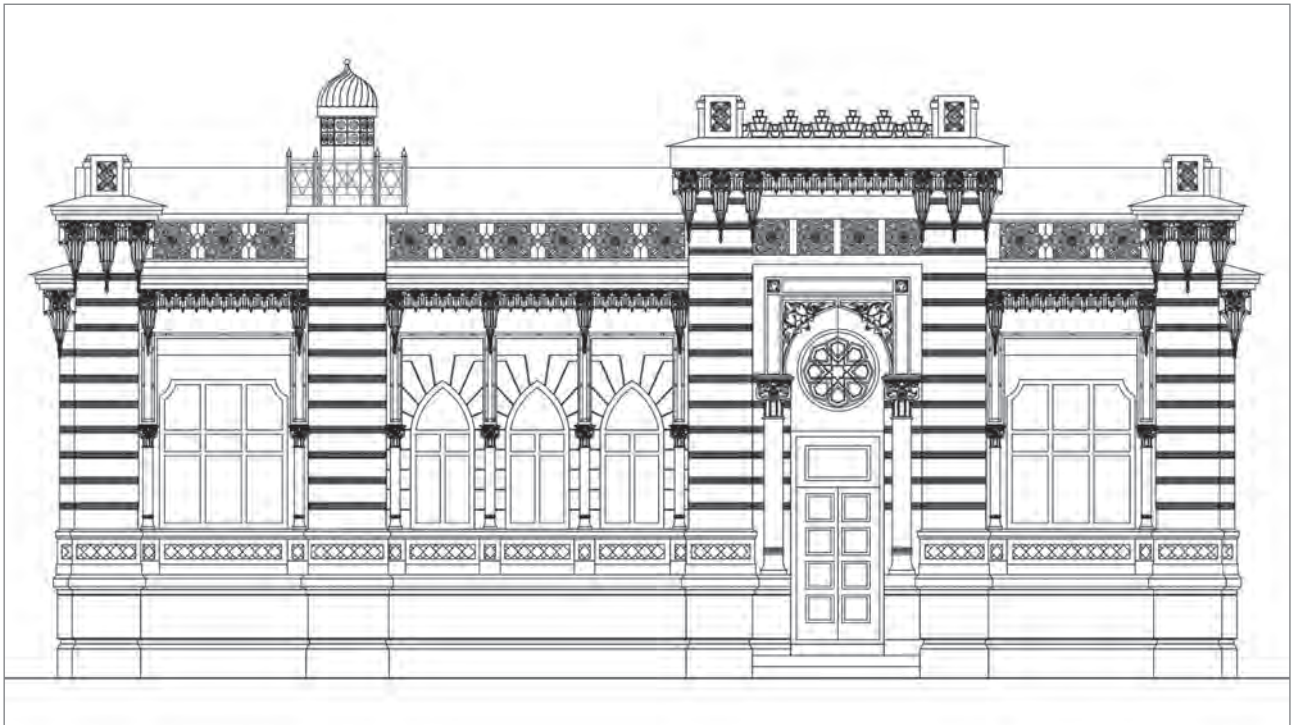


Figure 2: Bakhmutsky Mansion, 1906, Poltava, 15 Pylyp Orlyk Street (Ukr. *vulytsya Pylypa Orlyka*). Stylization of Moorish architecture (illustration: Tetiana Savchenko).

The increase in the number of entrepreneurs in the city was an effective factor in stylistic diversity in the architecture of Poltava in the early twentieth century. It was this social class that demanded the “new style” that the Secession became. There was borrowing of analogues of European contemporary styles of the time: Viennese Secession, German Jugendstil, and Belgian Art Nouveau. In combination with local traditions, this contributed to the spread of hybrid Secession styles (Korovkina, 2020; Figure 1). The desire of the bourgeoisie to follow European tendencies was manifested in the use of historical models of medieval and oriental architecture uncharacteristic of Poltava. These were mostly revenue houses and mansions, the artistic image of which reflected the tastes and social status of their owners (Figure 2). Mostly models of Renaissance and Classicism were used in the architecture of public administration buildings in Poltava during the period.

The revival of folk traditions in architecture was facilitated by the formation of the *zemstvo* and the development of culture. Of particular importance was the national liberation movement, which contributed to the formation and development of Ukrainian Art Nouveau. An analysis of the stylistic features of buildings in Poltava preserved from the beginning of the twentieth century (until 1917) was carried out. It showed that buildings in the historicism style (neoclassicism, neo-Moorish style, and eclecticism) account for 11% of the total, in the brick style 38%, in the Art Nouveau style (Ukrainian, five buildings; Russian and northern, one each) 10%; and in the Secession

style 41% (Savchenko, 2020a, 2020b, 2021). The variety of styles in the architecture of the city reflects the heterogeneity of the social and class composition of society. Buildings from the beginning of the twentieth century influenced a change in urban composition by increasing the number of storeys and building density (Figure 3).

4.2 Formation of Ukrainian Art Nouveau and its main features

The origins of Ukrainian Art Nouveau date back to around 1900. Its ideology was formed in Kharkiv. At that time, Kharkiv was a leading centre for the revival of national identity. It was there that the folklore movement and the Kharkiv School of Romantics, which collected Ukrainian folklore, was active. For the first time, the Kharkiv architect and artist Vasyl Krychevsky managed to embody the ideas of Ukrainian Art Nouveau in architecture in the Provincial Zemstvo Building (1903–1908). The Poltava provincial administration was famous for its unusualness and strong national consciousness. It gave rise to the idea of creating a building that would correspond to folk ideology. The Provincial Zemstvo Building was a reflection of the spirit of Poltava at the time, and the national self-consciousness of its residents, which were formed by their political, cultural, and educational activities. The opening of the monument to Ivan Kotliarevskyi was an important factor that became the impetus for the choice of the style solution

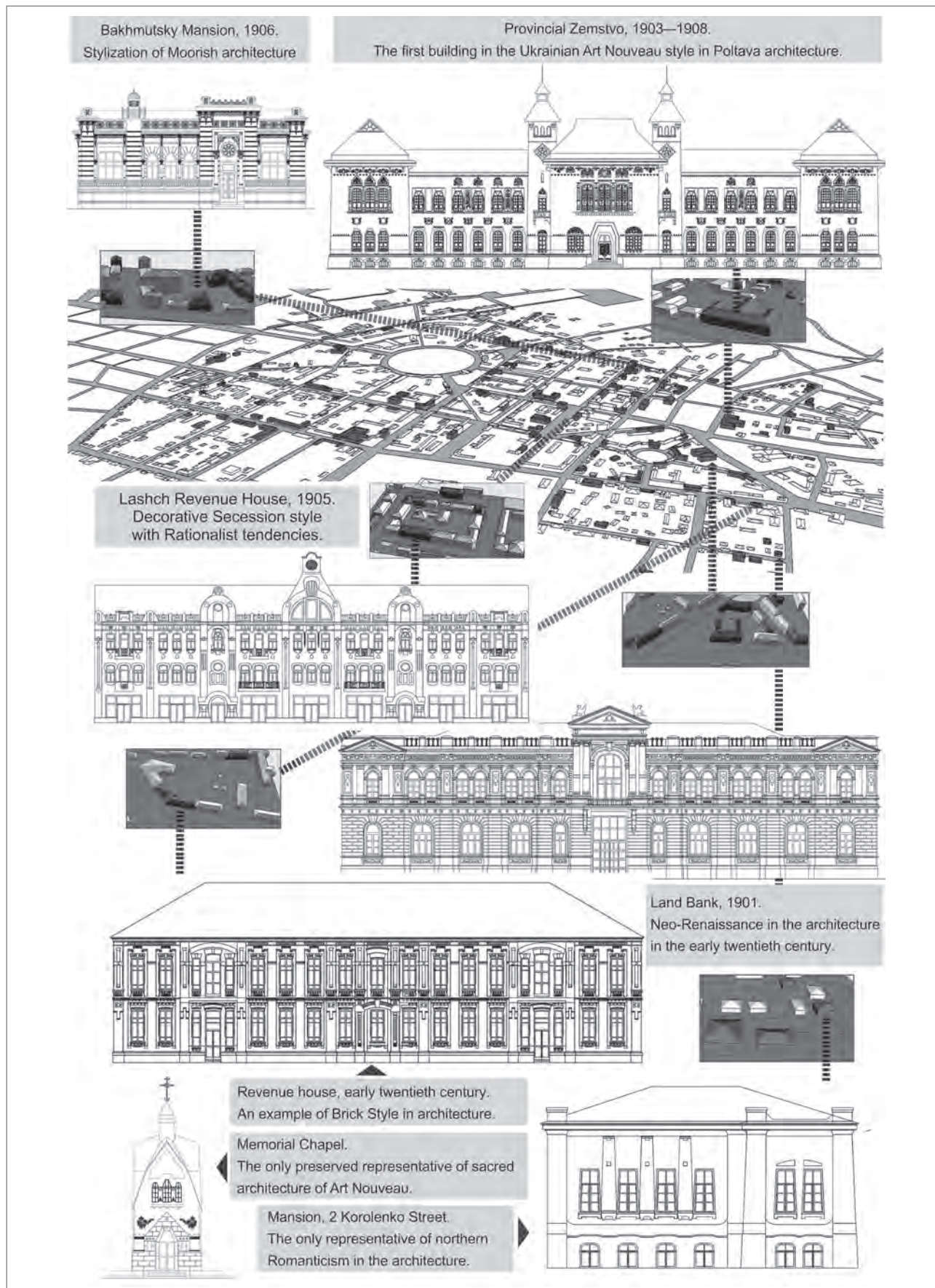


Figure 3: Influence of the buildings studied on the urban environment (illustration: Tetiana Savchenko).



Figure 4: Morphological analysis of buildings displaying Ukrainian Art Nouveau (illustration: Tetiana Savchenko).

of the Provincial Zemstvo Building. This event brought together leading representatives of Ukrainian culture in the city: Mykhailo Kotsyubynskyi, Lesya Ukrainka, Mykola Lysenko, Borys Hrinchenko, Vasyl Stefanyk, and others.

Decorativeness is characteristic of the Ukrainian Art Nouveau in central Poltava. This distinguishes it from the Rationalism inherent in central Kharkiv. Dynamic plastic compositions and developed decor are used in Poltava, and a synthesis of various art techniques (painting and majolica) is widely used. The Provincial Zemstvo Building had a significant symbolic meaning because it embodied a new stage in the development of Ukrainian culture.

The appearance of the Provincial Zemstvo Building on what was then Peter's Square (Ukr. *Petrovs'ka ploshcha*) concentrated public life in Poltava. The *zemstvo* building sought to move the centre from Russian-style Round Square (Ukr. *Kruhla ploshcha*) to the Ukrainian-style Provincial Zemstvo Building (Vadimov, 1991, 2019). In terms of social significance, it was the most important building of the beginning of the twentieth century. The location of the building is within the area where Poltava Fortress formerly stood. The administrative and religious centre of Poltava was located here until the nineteenth century (before Poltava obtained the status of a provincial city of the Russian Empire; Kovalenko, 2015). The location of the building of the city's self-government in the historical heart of the city indicates the desire to return to its history, to restore the identity of the place. It was a symbol of statehood as a guarantee of self-preservation, free development of the nation, and the national identification of Poltava residents at that time.

Intercession Church in the village of Plishevtsi (Hadiach district, Poltava region) became the second landmark building of Ukrainian Art Nouveau. The architect Ivan Kuznetsov used the famous monument of Ukrainian wooden architecture, Trinity Cathedral in Novoselyvka (1773–1778), as the basis of the model form. It was a nine-bay cross-shaped structure with a pyramidal silhouette. Similar compositional solutions were widely used in the sacred architecture of the eastern region of Ukraine during the spread of the Ukrainian Baroque. The church in Plishevtsi became a symbol of the revival of Ukrainian spirituality. Almost simultaneously with the Provincial Zemstvo Building from 1903 to 1905, based on a project of the Kharkiv architects Yevhen Serdyuk and Mikhail Stasiukov, a school was built and named after Ivan Kotliarevskyi (destroyed in 1943). The construction of the *zemstvo* school also had a symbolic meaning. It was the first public school intended for the children of workers and peasants. The building was a compact two-storey structure with an asymmetrical composition. These three buildings initiated the main directions of Ukrainian Art Nouveau development (as also suggested by

Chepeplyk, 2000): decorative and Romantic (the Provincial Zemstvo Building); Neo-Baroque (the church in Plishevtsi), and Rationalist (the school named after Kotliarevskyi).

These buildings expressed a symbolic trinity of social significance. These are aspirations for statehood, spirituality, and universally accessible public education. They are the key to the successful harmonious development of the nation (Chepeplyk, 2000). Later in Poltava the following buildings were built in the Ukrainian Art Nouveau style: Saint George's Chapel (1911–1914, by the architect Ihor Kalbus, 16a Zinkiv Street, Ukr. *vulytsya Zin'kivs'ka*), the city mansion at 37a Presentation Street (Ukr. *vulytsya Stritens'ka*, 1912), the Sergej Khrulyov Women's Art and Craft School of Poltava (1912, by the architects Oleksandr Varyanitsyn and Serhij Tymoshenko, destroyed during World War II; a modern communications building was built in its place), and the Folk Art School (1913, by the architect Serhij Tymoshenko).

Working on Poltava buildings, Kharkiv architects managed to reflect the local traditions of design. While working on the *zemstvo* project, Vasyl Krychevsky studied the folk architecture of the Poltava, Sumy, and Chernihiv regions and the Kharkiv suburbs (Vitchenko, 2019). The use of form patterns, details, decor, and ornaments of the traditional folk architecture of the Poltava region in the design of Art Nouveau buildings expresses the identity of the place and the conscious identification of the inhabitants of Poltava at that time as part of the Ukrainian nation.

Thus the Poltava centre of Ukrainian Art Nouveau was formed. The architects used the following regional means of compositional and artistic expressiveness: dynamic plastic compositions of buildings; stylistic unity of internal and external space; synthesis of arts in exteriors and interiors: majolica, painting, wood and stone carving, and so on; wealth of decoration; and a colour scheme based on the use of mainly warm shades.

4.3 Volumetric and spatial composition of Ukrainian Art Nouveau buildings

The volumetric and spatial composition of Ukrainian Art Nouveau buildings is based on folk architecture (patterns of form) that was characteristic of a certain region. On this basis, architects created a completely new image of a building that met the requirements and needs of the time. In Poltava, building construction was carried out through reproducing (fully or partially), combining, and borrowing other forms at the level of the total volume (patterns of morphogenesis, to use the terminology of Vitchenko, 2019). The architecture of the buildings was determined by the pattern of form that was chosen depending on the functional purpose of the

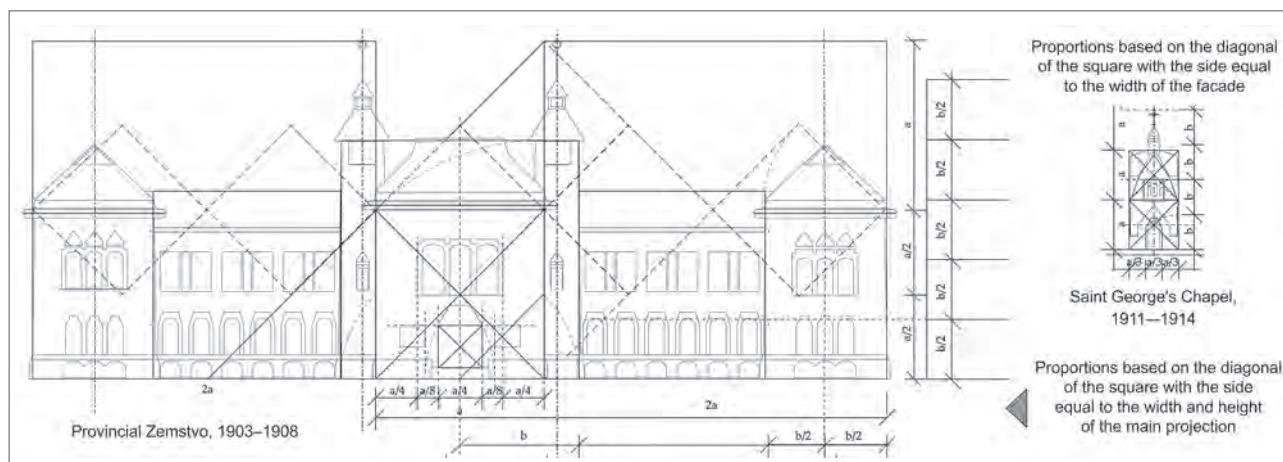


Figure 5: Proportional construction of facades of Ukrainian Art Nouveau buildings (illustration: Tetiana Savchenko).

building and its scale. Thus, in the Provincial Zemstvo Building, a combination of Ukrainian traditional forms of the house, belltower, and church was used, which is due to the scale of the building (Vitchenko, 2019). In creating Saint George's Chapel at 16a Zinkiv Street, a reproduction of the belltower pattern was used, and in the Folk Art School (2a Constitution Street, Ukr. *vulytsya Konstytutsiyi*) the house pattern (Figure 4).

The Ukrainian Art Nouveau buildings in Poltava are characterized by a scale variety of compositional organization. The variety of scale of the Provincial Zemstvo Building is manifested in the large divisions of the projection sections, the massive entrance portal, the grouping of windows, and the towers. All of this was combined with small divisions of the facade with lesenes, detailing of multi-tiered finishes, and decorative painting details.

The Poltava examples of Ukrainian Art Nouveau reveal the proportionality of the construction of the form. The application of the method of squares and its diagonals in the proportional organization of Ukrainian Art Nouveau buildings is described. In the Provincial Zemstvo Building, a square with a side equal to the width of the main projection of the building is taken as the basis of the proportional structure. In turn, the basis for building Saint George's Chapel on Zinkiv Street, which has a three-part division in height, was the width of the facade in its lower part (Figure 5; Savchenko, 2020a).

4.4 Architectural elements of Ukrainian Art Nouveau

In addition to composition, architectural elements play a decisive role in Ukrainian Art Nouveau buildings. They are the bearers of semantic features of architectural style (as also suggested by Antoshchuk, 2017, 2018). The architectural ele-

ments of Ukrainian Art Nouveau are formed by academic and modernized stylization of elements of traditional folk housing and churches. Iconic elements of Ukrainian Art Nouveau are towers and structured sculpted tops, characteristic of Ukrainian sacred wooden architecture. The active use of turrets and towers in the composite construction of buildings is typical. This demonstrates the desire of the architects to add a greater vertical character to the buildings. It symbolized the heroism of the Ukrainian people, and the triumph and rise of national consciousness. Roofs have an important place in the expression of the artistic image of buildings of this style, as a special manifestation of its uniqueness. The roof of the Provincial Zemstvo Building is traditional in Ukrainian folk architecture. It is a half-hip roof with four slopes and an attic window on the ridge. The towers have a two-part hip roof with a vertical spire at the top. The shape of the roof is a special stylistic feature of Ukrainian Art Nouveau. Such a roof with a steeper slope on the corners completes Saint George's Chapel on Zinkiv Street. It forms a tongs-like shape with five corners.

The facades of Ukrainian Art Nouveau buildings have a minimum number of horizontal elements; only plinths and cornices stand out. Usually, the cornice slab had a large ledge and was supported by brackets on both the Provincial Zemstvo Building and the Folk Art School. The latest principle introduced in the architecture of Ukrainian Art Nouveau buildings was the vertical divisions. The plane of the wall was divided by simple lesenes. They became trapezoidal arches, which created a flat frame of window openings (Chepeylyk, 2000). The following were used in the decoration of the walls: ceramic cladding (the main facade of Provincial Zemstvo Building, Saint George's Chapel on Zinkiv Street), whitewashing (the Folk Art School, the city mansion at 37a Presentation Street), and bare brickwork (the courtyard facades of the Provincial Zemstvo Building, as also suggested by Savchenko, 2020a). Flat decor in the form of paintings and majolica was used to decorate the facades of buildings in the Ukrainian Art Nouveau style (Figure 6).

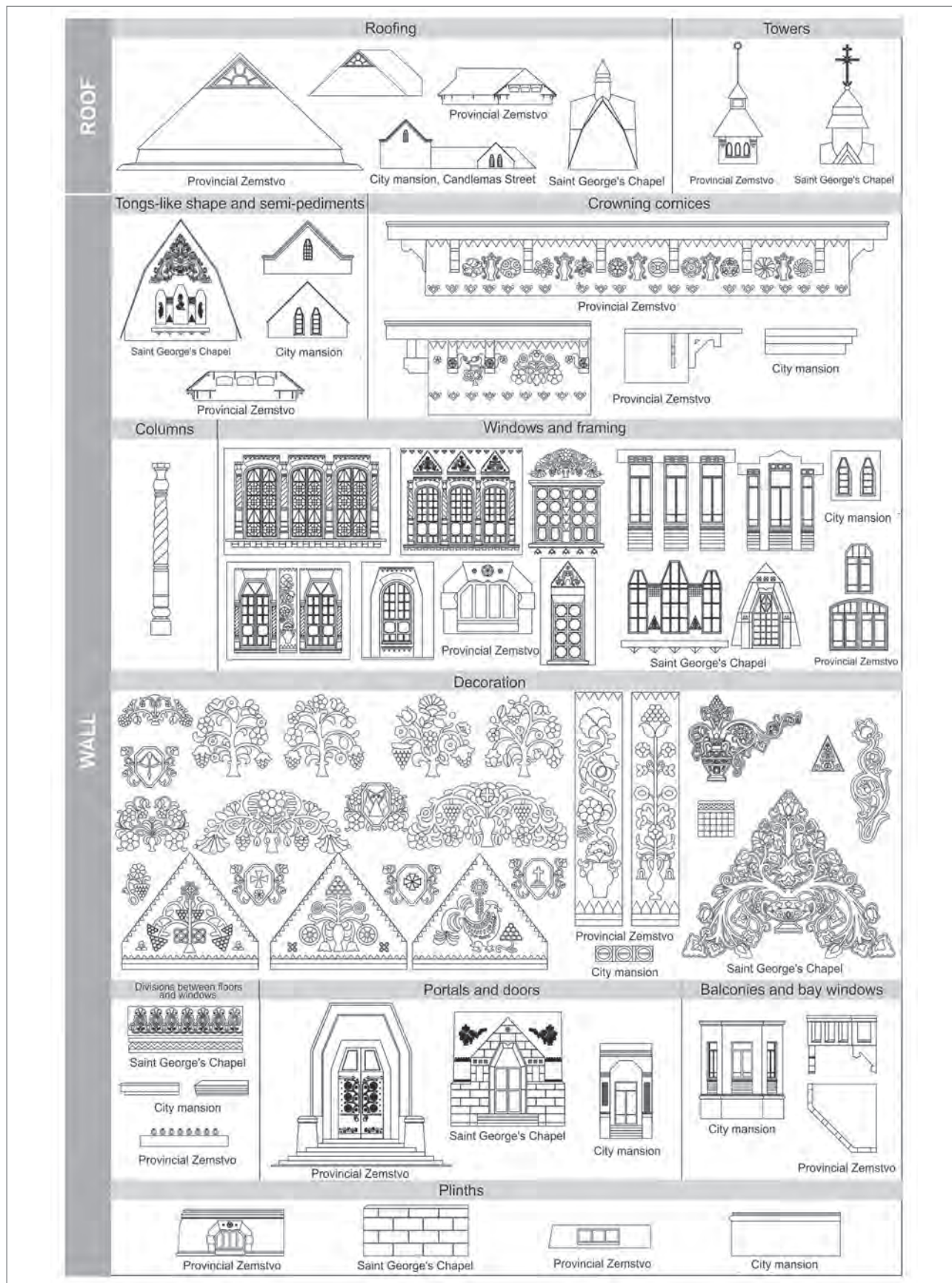


Figure 6: Architectural elements of the Ukrainian Art Nouveau style of Poltava at the end of the nineteenth century and in the early twentieth century (illustration: Tetiana Savchenko)

The emergence of Ukrainian Art Nouveau and the construction of the most outstanding buildings in Poltava contributed to the production of architectural and construction ceramics. These were mainly clay tiles with modernized Ukrainian ornamentation. During the construction of the Provincial Zemstvo Building, the pottery workshops in Opishna were restored. This was facilitated by the ceramist Peter Vaulin, who at that time (1904) worked as a teacher at the Myrhorod Industrial and Art School (Khanko, 2002). Facing bricks and decorative tiles were created here. It is known that the facing tiles for the facades of the building were made by the Opishnia potter Ivan Gladyshevskyi (Shcherban, 2010). Majolica panels, coats of arms, and tiles for interiors were made in Myrhorod, and roof tiles at a factory in the village of Malo-Budyshchansk. The second wave of restoration of pottery production in the Poltava region was caused by the construction of a chapel on the site of a peasant camp in honour of the meeting between the representatives of the province of Poltava and Russian Tsar Nicholas II. This happened during the celebrations of the two-hundredth anniversary of the Battle of Poltava. Due to the lack of experienced potters in Poltava, Yuriy Lebishchak was invited to Opishna. Before that, he worked at ceramic enterprises in Vienna and Lviv, and he headed a workshop for the production of facing tiles in Halych. He restored the work of local pottery workshops in the Zinkiv District Zemstvo Building. Mykhal Ivashkevich arrived with him. Ceramists from Myrhorod – Andrii Sydorenko and Petro Shumeiko – were also invited. In the activities of Yuriy Lebishchak in the Poltava region, a certain influence of Western Ukrainian traditions is felt. This contributed to a certain unity of the centres of Ukrainian Art Nouveau.

Ukrainian Art Nouveau is characterized by special forms of window openings. A trapezoidal hexagonal window became widespread in city buildings. It had several options of proportions: 1:2, 2:3, or close to a square (Provincial Zemstvo Building, Saint George's Chapel, and Folk Art School). Several unique compositions were used in the Provincial Zemstvo Building. First is a trapezoidal hexagonal window flanked by small columns supporting five trapezoids. Second is elliptical triforium window in combination with columns and rectangular niches (the window above the main portal) or triangular niches (on the side projections). The portals give expressiveness to the facades of buildings built in the Ukrainian Art Nouveau style. Their arrangement has its roots in the architecture of wooden churches, houses, and barns, as well as in the stone architecture of the seventeenth and eighteenth centuries (Khanko, 1991). Using Chepelyk's (2000) classification, in the architecture of Poltava of the late nineteenth and early twentieth centuries the following elements are distinguished:

- A portal in the form of an entrance loggia (the Provincial Zemstvo Building). It is a trapezoidal loggia with a front

entrance staircase and a trapezoidal doorway inside. In the middle of the slot there is a carved door, decorated with an ornamental "tree of life" composition. There is a ceramic decorative panel of the "vase" type on the inner side walls of the loggia;

- A portal in the form of a vestibule pushed forward and covered with a hip roof (courtyard entrances of the Provincial Zemstvo Building). A trapezoidal doorway is used;
- A portal-portico with columns with a square cross-section (the city mansion at 37a Presentation Street);
- A simple portal with a trapezoidal slot and framed by a stone platband (Saint George's Chapel at 16a Zinkiv Street).

The synthesis of art techniques, which manifested itself in the decoration of facades and interiors of buildings, became a characteristic feature of Ukrainian Art Nouveau. The creation of a "solid artistic space" from the inside and outside of buildings relates Ukrainian Art Nouveau to the styles prevalent in Europe at that time: Secession, Liberty, Jugendstil, and so on. The wide use of glazed ceramics in the artistic decoration of buildings was a characteristic and well-established folk tradition in various regions of Ukraine. This is a natural material, the use of which reflects the aesthetic ideals of the people and corresponds to local climate conditions (Selishcheva, 2007). Placing the coats of arms of the Cossack regiments of the Poltava Region on the main facade of the Provincial Zemstvo Building had an important symbolic meaning. The names of the cities were written in cursive in Ukrainian, which was banned by the Russian Empire at the time.

4.5 Further development of Ukrainian Art Nouveau

The second stage is represented by the Ukrainian Art Nouveau of the 1920s and 1930s. In the architecture of Poltava, its features are mainly found in the residential buildings at 15 Cathedral Street (Ukr. *vulytsya Sobornosti*), 16 and 18 Lysenko Street (Ukr. *vulytsya Lysenka*), and 36 Heaven's Hundred Street (Ukr. *vulytsya Nebesnoyi Sotni*), as well as in public ones, such as the Railway Club at 3 Glory Square (Ukr. *ploshcha Slavy*). Most of these buildings were located away from the historical city centre. Their three-dimensional solution and decoration were much more restrained and rational compared to the heyday of Ukrainian Art Nouveau in the early twentieth century. Ukrainian Art Nouveau did not become widespread due to ideological inconsistency with the state system and the prohibition of national traditions (Belyavska, 2013). Careful attempts to add national features were found in the architectural elements of multi-storey residential buildings of the late 1930s at 47 Anatoliy Kukoba Street (Ukr. *vulytsya Anatoliya*

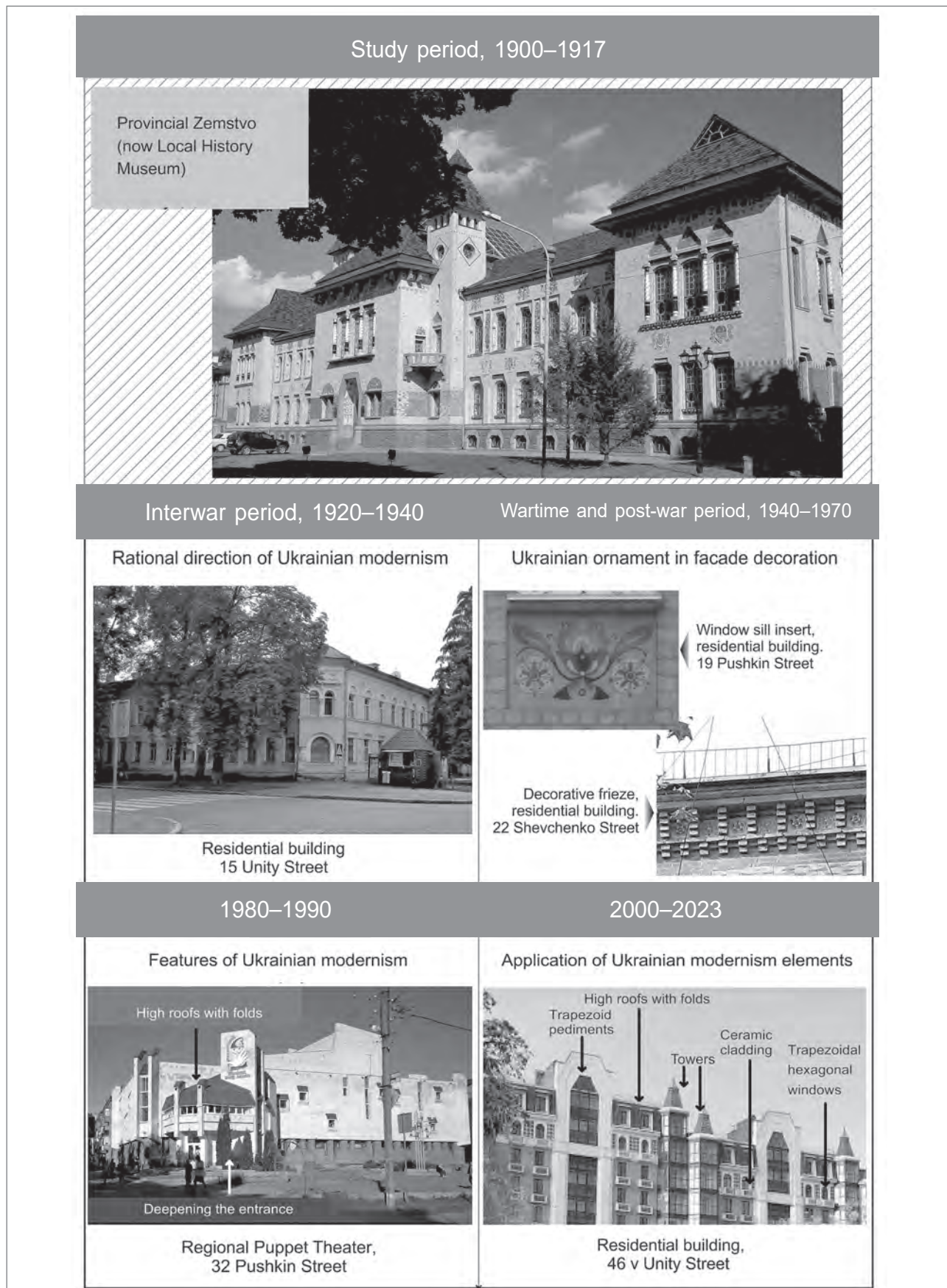


Figure 7: Features of Ukrainian Art Nouveau from the 1920s to the 2020s (illustration: Tetiana Savchenko)

Kukoby, 1938) and 27/24 European Street (Ukr. *Yevropeys'ka vulytsya*, 1940), and the preschool building at 7a Monastery Street (Ukr. *vulytsya Monastyr's'ka*, 1937). The restrained features of Ukrainian Art Nouveau were revealed in the use of decorative ornaments on the facades of residential buildings from 1950 to 1960, compositional solutions of some buildings of the 1980s (the Regional Puppet Theatre, 1983; Aseev, 1989), and stylistic interpretations of modern architecture (Figure 7).

5 Discussion

Modern Ukrainian architecture is in a formational stage. Since the declaration of Ukraine's independence in 1991, new opportunities for free creativity have opened up for Ukrainian architects. Under the influence of globalization and the attitude toward architecture as a product of mass consumption and mass culture, the balance between international style and national character in architecture has been disturbed (Vadimov, 2019). The loss of regional and national features in architecture makes the issue of identifying a place, identifying its *genius loci*, particularly relevant. The concept of *genius loci*, in addition to the material aspect, includes an intangible component. It creates a certain atmosphere (or unique character) of the urban environment, which corresponds to the mentality of the residents and the identity of the place. Attention to the intangible component of cultural heritage is increasingly emphasized at the world level. This is recorded in the Quebec Declaration on the protection of *genius loci* adopted in 2008.

Historical and cultural heritage is the basis of the morphology of the modern urban environment. Its preservation is an important issue in the formation of urban culture. According to modern researchers, the main resource for the sustainable development of cities during globalization is preservation of the uniqueness of the environment (Blinova, 2016). To solve the problem of the city's identity and give modern architecture regional characteristics, we suggest using architectural and compositional means and techniques characteristic of Ukrainian Art Nouveau of the beginning of the twentieth century. This contributes to solving the problem of preserving the character of national culture, passing on the "code" of the nation to later generations.

Currently, the preservation of historical and cultural heritage in Poltava, including Ukrainian Art Nouveau buildings, is problematic. Only one of them is included in the state register of cultural heritage monuments of national importance (the Provincial Zemstvo Building, no. 160034-H) and two in the register of local importance (the Folk Art School, no. 20-PL and Saint George's Chapel, no. 11-PL). Even though these

buildings are protected as monuments, this does not prevent their deterioration. Currently, Saint George's Chapel at the site of the peasant camp at 16a Zinkiv Street is in unsatisfactory technical condition. The decorative cladding, which expresses the national character of the Poltava region, is actively deteriorating. The condition of other Ukrainian Art Nouveau buildings also demands attention. Taking into account the problems of preserving the architectural monuments of Ukrainian Art Nouveau and with the aim of continuing national traditions in the architecture of Poltava, the following should be carried out:

- Entering all preserved monuments of Ukrainian Art Nouveau from the beginning of the twentieth century into the state register;
- Form a list of buildings that have signs of Ukrainian Art Nouveau and were built later (throughout the twentieth century) with the aim of their further inclusion in the state register;
- Holding public events to popularize knowledge about the special features of the city's historical construction, including buildings displaying Art Nouveau, as a manifestation of national character;
- Using compositional means formed by Ukrainian Art Nouveau in modern design, which will contribute to preserving the identity of the place.

Recommendations for introducing features of Ukrainian Art Nouveau have been developed by Antoshchuk (2018) and Vitchenko (2019). As Antoshchuk (2018: 15) concludes, the hereditary approach is one of the most promising approaches to applying national traditions in modern architecture. It is based on a creative rethinking of the achievements of the previous periods and their embodiment in architecture with the help of modern design solutions and the use of modern building materials. The application of such an approach to folk architecture during the formation and flourishing of Ukrainian Art Nouveau of the early twentieth century makes it related to modernity.

Vitchenko (2019: 19) suggests using traditional design patterns to create new works, such as churches, belfries, chapels, huts, cloisters, storerooms, gates, and tenements. By employing patterns of morphogenesis (reproduction, transformation, combination, integration, and borrowing) at all levels of the structural hierarchy, the formation of a new creation (volume, elements, and details) is possible. This needs further application in modern design with an analysis of the results. There has been a continuation of research on the national character of the architecture of Poltava in the twenty-first century. The main result of this study can be proposals to enter buildings into the state register of cultural heritage and thus protect them as monuments.

6 Conclusion

Ukrainian Art Nouveau developed in the context of pan-European Art Nouveau. Like the Scandinavian and Baltic countries, it reflected the need for national revival in conditions of territorial dependence on other countries. In terms of its ideology and artistic solutions, Ukrainian Art Nouveau fully corresponded to the international currents that spread in Europe at the end of the nineteenth and beginning of the twentieth centuries. At the same time, it is the most original national style, a result of the rise of national consciousness. The ideology of the revival of folk traditions and national identification place it in the broad context of the development of Art Nouveau in eastern and northern Europe. In the architecture of Poltava, Ukrainian Art Nouveau was formed against the background of the development of international styles (Secession, Neoclassicism, and Brick Style). It reflected the level of development of the society at that time, and it became the embodiment of the views of creative intellectuals.

Ukrainian Art Nouveau expressed the identity of a place and national identification. It is an important part of the historical and cultural heritage of Poltava. Its preservation is one of the main tasks of the modern development of the city. Hopefully, the semantic features and methods of shaping Ukrainian Art Nouveau will be reflected in the development of modern architecture with a national character and will help strengthen national cultural values. Original national character is one of the main issues of modern architecture. In addition to material needs, architecture must satisfy the intangible needs of the nation.

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UDC: 711.4:330.34(292.6)
doi:10.5379/urbani-izziv-en-2023-34-01-04

Received: 23 April 2023

Accepted: 24 May 2023

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Urban economics in the Global South: A study of *The Economist*

Urban economic analysis receives little attention in the Global South. The COVID-19 pandemic and its highly urbanized impacts made urban economics more relevant, but how it was applied warrants investigation. One way to address this issue is to examine how African economies – the focus of much attention during the peak of the COVID-19 pandemic (2020–2021) – were discussed among economists. Did they pay attention to the urban economy in Africa? How well did they do so? Do the resulting proposed economic policies for recovery reflect urban economic realities in Africa? With no answers from any economist, this article draws on data comprising more than five hundred articles about COVID-19 published in *The Economist* and their content analysis. Three results

must be emphasized. First, most economic analyses were national or regional, with limited attention to Africa's urban economies. Second, where they considered the urban economy of Africa, *The Economist's* articles, often steeped in mainstream urban economics, were quite misleading. Third, and finally, these results raise fundamental questions about *The Economist's* proposed economic policies to drive (urban) economic recovery. This study suggests that some special features of mainstream urban economics limit its potential.

Keywords: cities, urban economics, *The Economist*, the Global South

1 The urban challenge: A grim calculus between life, death, and the economy

We live in a predominantly urban world. It “will continue to urbanize over the next three decades—from 56 percent in 2021 to 68 percent in 2050. This translates into an increase of 2.2 billion urban residents, living mostly in Africa and Asia” (UN-Habitat, 2022: xv). Urban planning poses a major urban challenge in the Global South, but the most fundamental urban question is how to analyse and manage the urban economies in the Global South (Zhang, 2015: xvi–xvii; UN-Habitat, 2022: 103–138). These urban economies not only reflect national economies, but also drive them (Njoh, 2003; Obeng-Odoom, 2010; Ahimah-Agyakwah, 2022). Much like urban economies elsewhere (UN-Habitat, 2022: 103–138), the urban economies in the Global South are not simply a subtotal of larger economies. These intermingle with urban economic structure and urban form, but urban economies must be studied on their own terms as well.

Yet, urban economic analysis in the Global South receives relatively little attention in urban economics (Glaeser & Henderson, 2017). Whether such economies can be analysed by using the same tools of mainstream urban economics is contested (see Zhang, 2015: xvi–xxii; Obeng-Odoom, 2013a, 2013b, 2016). However, the orthodoxy in urban economics has recently been promoted by both economic geographers and mainstream urban economists (Glaeser & Henderson, 2017; Randolph & Storper, 2022) as capable of illuminating and helping resolve such an urban challenge. Thus, the question is no longer whether to apply urban economic analysis to the Global South, but how well mainstream urban economics appreciates cities in the Global South.

The 2020–2023 COVID-19 pandemic provides a natural experiment to address this question. During that period, economists provided sustained and substantial analyses of “a grim calculus” or “the stark choices between life, death and the economy” around the world (*Economist*, 2020r). However, these works nearly always focused on academic economists’ studies of national or global economies (see Murray, 2020), some reflecting earlier studies (e.g., Mackenzie et al., 2007) on how economists interpret, and try to change, the world. Previous research on cities and COVID-19 (e.g., Asante & Mills, 2020; Finn & Kobayashi, 2020; Ojong, 2020; Onyishi et al., 2020) does not address questions related to urban economics.

Outside academic economics, a flurry of economic analysis can be found in the media. The corpus of news about African economies during the peak of the COVID-19 pandem-

ic illustrates the point. Yet, it is not well known how much and how well these economic analyses reflected Africa’s urban economies. Three questions demand urgent answers. First, did economists pay attention to the urban economy in Africa? Second, how well did economists analyse urban economies? Third, do the resulting proposed economic policies reflect the generalities and special features of the spatial economy in Africa (see *Economist*, 2020r, 2020t)? Media analyses in urban and regional studies abound (e.g., Molotch, 1970; Molotch & Lester, 1999; Sa, 2009; Mirrlees, 2017; Grisold & Theine, 2020; Harjuniemi, 2020; Shin & Boonjubun, 2021), but they do not address these questions.

Examining articles in *The Economist* might help address these questions. Between 2020 and 2021 alone, the newspaper published more than five hundred (504) COVID-19 articles on a wide range of issues, including the environment and the economy (*Economist*, 2020e). These were widely circulated to about 1.2 million people globally (Economist Group, 2021: 18–19). Readers paid particular attention to COVID-19 news, which received some 25% of the time spent reading the newspaper (*Economist*, 2021). No single academic economist can claim this influence.

The Economist’s (2020y: 48) vision is “Liberalism – the Enlightenment philosophy, not the American left”. Although *The Economist* has never wavered from this right-wing ideology of enlightenment (Starr, 2004; Zevin, 2019; *Economist*, 2020y), this ideology has not narrowed the range of issues covered in the newspaper. On the contrary, this periodical is arguably the broadest among its peers in terms of reporting on economic issues, on which it exerts considerable influence (Harjuniemi, 2020). The editors of *The Economist* are actively briefed by the UK Treasury, for instance, and the newspaper provides a key platform for leaders to address the world (Zevin, 2019; Obeng-Odoom, 2022a, 2022b). With a dedicated Middle East and Africa section as well, it is worth examining *The Economist’s* articles.

Based on a content analysis of more than five hundred articles about COVID-19 published in *The Economist* from 2020 to 2021, this article shows that most economic analyses were national or regional, with limited attention to Africa’s urban economies. Where they did consider such urban economies, these articles, drawing on mainstream urban economics, offered questionable claims. Consequently, the prevailing proposals for (urban) economic recovery are contestable. To illustrate these arguments, the rest of this article is divided into three sections. The methods section contextualizes and explains how the data were collected and analysed. The results section follows, with two subsections. The first – on COVID-19, cities, and (urban) economic development – sketches

the ramifications of COVID-19 in Africa at various scales, addressing the first and second research questions. The second – on (urban) economic recovery – sets out economic strategies for addressing the noted (urban) economic development crisis, addressing the third research question. These results are followed by a discussion section that shows the fundamental limitations of the mainstream urban economics approach.

2 Methods

Media reports might be considered unscientific and hence have no place in scholarship. However, news and the analysis of its content are critically important in urban economic research. News has taught us about urban property prices, for example (Munro, 2018). Thus, many urban analysts (see Molotch, 1970; Munro, 2018; Shin & Boonjubun, 2021) increasingly examine news content. Such content analysis (Starr, 2004; Lammensalo, 2021; Atria et al., 2022; Obeng-Odoom, 2022b; Tarvainen, 2022) tends to focus on what has been said or written. However, a greater power of content analysis is revealing what exists, but the author chooses not to state (Munro, 2018). That which is hidden also reveals the ideological orientation of the author, the author's interests, and the author's agenda. Collecting data from both the manifest and the latent (Holsti, 1961: 12–14) in a newspaper can, therefore, provide one way of studying an urban phenomenon.

Even so, criticisms of using newspaper content persist. As summarized by Moira Munro (2018), these methods are said to merely recycle old stories; content analysis of news is detached from practice, and the method is sometimes viewed as unsystematic. These claims are not fundamental: they can be addressed by redesign. News may be recycled, but the purpose of analysing even old news is to appreciate the real world. Done well, content analysis can be both systematic and transparent, such that the stories referenced can be tracked. Thus, “[t]here is surely scope for further research using this method” (Munro, 2018: 1101).

Two methodologies are prevalent. One is deductive (the domain of much bibliographic research), and the other is inductive (the forte of many discourse analyses). The former seeks to extract meanings from word count and theory, and the latter counts words and deduces meaning from experience. Both are unsatisfactory because they are partial (Lainé, 2019: 776–779). Abductive content analysis is more holistic (Lainé, 2019: 776–779) and therefore more germane to this study. I collected and analysed data from *The Economist*, the most prominent newspaper of its kind in the world. During the data collection period, I was a subscriber to *The Economist*. I read the paper copies of the newspaper. From a total of 104 issues,

it became clear that COVID-19 stories could appear in any section of *The Economist*. I focused on collecting the stories from 2020 to 2021. This timeframe is appropriate because most of the COVID-19 stories in *The Economist* were published in 2020–2021. In the words of *The Economist* (2021c), “[i]n 2020 nearly half of articles in *The Economist* mentioned it, the highest share for a single subject since the second world war” (see also *Economist*, 2020x).

The quantity of news on COVID-19 declined sharply in 2021 (see Figure 1) but, as recent research on COVID-19 (Atria et al., 2022: 445) has shown, a discursive thread was established within only three months. Elsewhere, a total of 222 articles are suggested to be sufficient for such analyses (Munro, 2018: 1094), and so collecting this study's pool of more than five hundred news data points over a twenty-four-month period is clearly robust.

Atlas.ti could be used to analyse digital news, “not only text data but also video and other digital media formats” (Hwang, 2008: 525). However, the paper copies of *The Economist* that I needed to probe could not be analysed by using *Atlas.ti* software. Previous studies (e.g., Holsti, 1969: 150–194; Lainé, 2019: 776–779) that use or defend qualitative data analyses contend that, under such circumstances, other qualitative data analysis strategies could also be used effectively. Eliminating computing counting software also removes the risks of counting words without reading, and reading words without context.

So, I set out to read the news articles carefully. First, I established two main thematic categories; namely, 1) COVID-19, cities, and (urban) economic development, and 2) (urban) economic recovery. These categories framed *The Economist's* diagnoses and solutions, and hence satisfied a critical content analysis criterion: “categories should reflect the purposes of the research” (Holsti, 1969: 95). Initially, some of the stories did not easily fit into these “semantic families” (Atria et al., 2022: 446) or categories (Holsti, 1969: 94–126), but a process of iterative re-reading and reflections helped in classification, consistent with Munro's (2018: 1094) recent study. As noted by Kahneman et al. (2021: 223, 257–258, 300–311), to remove noise in data analysis, complex judgements must be structured by decomposing and documenting intermediate steps, independently assessing each step, and holistically making a judgement. Highlighting especially lucid and representative quotations also helped in the process. As Figure 1 suggests, across the board, news data for the sections studied in *The Economist* – namely, Cover, Leaders, Briefing, Middle East & Africa, Business, Finance & Economics, Science & Technology, and Specials – decreased considerably in 2021. Accordingly, I had fewer data to analyse for that year.

Table 1: Articles on COVID-19 in *The Economist* relating to Africa and the rest of the world, 2020–2021.

| | Year | Jan/Feb | Mar/Apr | May/June | Jul/Aug | Sept/Oct | Nov/Dec | Total |
|---------------------------|------|---------|---------|----------|---------|----------|---------|-------|
| Number of issues reviewed | 2020 | 9 | 8 | 9 | 9 | 9 | 9* | 53 |
| | 2021 | 9 | 8 | 9 | 9 | 9 | 7 | 51 |
| Cover | 2020 | 6 | 7 | 16 | 9 | 3 | 6 | 47 |
| | 2021 | 6 | 4 | 8 | 8 | 5 | 3 | 34 |
| Leaders | 2020 | 4 | 19 | 23 | 8 | 7 | 6 | 67 |
| | 2021 | 6 | 5 | 4 | 4 | 3 | 2 | 24 |
| Briefing† | 2020 | 1 | 12 | 9 | 2 | 2 | 2 | 28 |
| | 2021 | 3 | 1 | 3 | 1 | 1 | 1 | 10 |
| Middle East & Africa | 2020 | 0 | 4 | 10 | 6 | 1 | 1 | 22 |
| | 2021 | 1 | 2 | 1 | 2 | 0 | 2 | 8 |
| International | 2020 | 6 | 11 | 10 | 6 | 4 | 4 | 41 |
| | 2021 | 1 | 1 | 5 | 3 | 1 | 1 | 12 |
| Business | 2020 | 1 | 10 | 28 | 14 | 6 | 4 | 63 |
| | 2021 | 3 | 1 | 2 | 1 | 0 | 1 | 8 |
| Finance & Economics | 2020 | 2 | 23 | 22 | 10 | 8 | 3 | 68 |
| | 2021 | 1 | 2 | 3 | 4 | 2 | 1 | 13 |
| Science & Technology | 2020 | 1 | 12 | 14 | 4 | 2 | 5 | 38 |
| | 2021 | 6 | 3 | 3 | 0 | 1 | 2 | 15 |
| Specials‡ | 2020 | 0 | 1 | 2 | 1 | 1 | 0 | 5 |
| | 2021 | 0 | 1 | 0 | 0 | 0 | 0 | 1 |

Source: author.

Note: *The last issue was a double issue containing *The Economist's* own analysis of the share of COVID-19 news in the newspaper (*Economist*, 2020x); †regular briefings of *The Economist*, not occasional or economic briefings; ‡includes Special Reports, By Invitation, and Technology Quarterly.

Only titles with specific references to *COVID-19*, *plague*, *pandemic*, and *post pandemic* were counted as relevant (see Table 1). For both years, 2020 and 2021, I first sorted all the issues of *The Economist* into individual months, from January to December. Next, I combined issues of *The Economist* published in two-month periods (January/February, March/April, etc.). I separated the issues into smaller bits, went through the issues to highlight relevant stories, and then tallied the number of relevant stories to improve the reliability of the data. They were all systematically recorded in Excel spreadsheets, a practice used by Michael Lainé (2019) in his study of newspapers in France.

Reading the same issues multiple times at different periods for more than two years (2020–2023), collecting data from different sections of the newspaper during the study, and presenting and discussing these data on multiple forums also improved reliability. Such steps also helped reduce what Kahneman et al. call “occasion noise” in the data analysis process, “driven by countless triggers, including mood”. In this type of research, “if you can, . . . revisit your judgements at different points in time, when the triggers of occasion noise are likely to be different” (Kahneman et al., 2021: 257–258). The multiple number of times I went through the same newspaper to collect data

from the Cover, Briefing, Middle East & Africa, International, Business, Finance & Economics, Science & Technology, and Specials helped develop a deeper appreciation of *The Economist* and its stories to address the three research questions.

3 Results

3.1 COVID-19, cities, and (urban) economic development (first and second research questions)

On 14 March 2020, *The Economist* reported the rise of “ghost towns” (2020o). These are cities where many people died and economic activities stalled (*Economist*, 2020k, 2020l). These tragedies resulted in mental health crises, grief, depression, and trauma (*Economist*, 2020f). Cities faced distinctive challenges in Africa (Asante & Mills, 2020; *Economist*, 2020d), where, according to data from the Africa Centres for Disease Control and Prevention (Africa CDC, 2020c: 1), 41,623 people had died from COVID-19 by 27 October 2020. This record represented a case fatality rate of only 2.4%, lower than the global case fatality rate of 2.7%. However, some African countries, including Chad (6.7%), Sudan (6.1%), Liberia (5.8%),

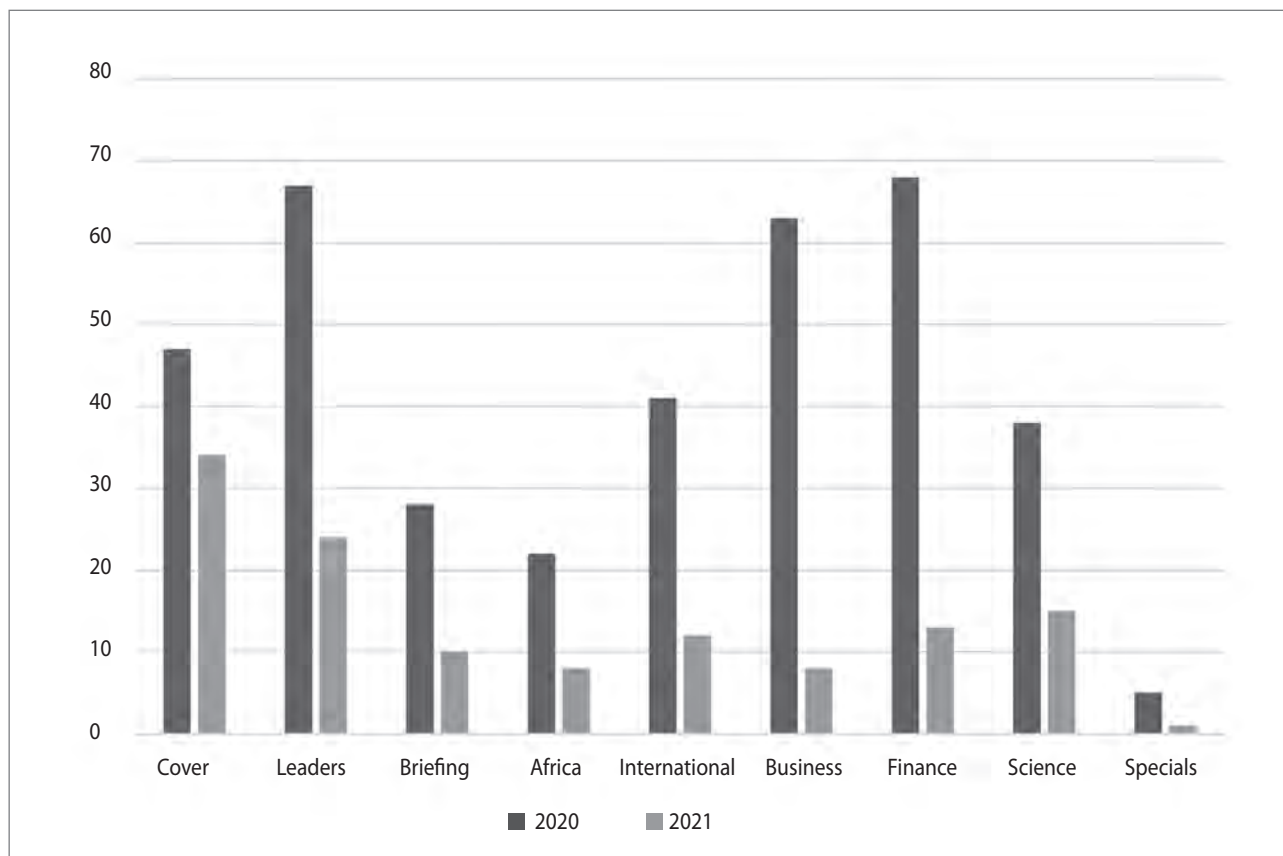


Figure 1: Declining reporting of COVID-19 news in *The Economist*, 2020–2021 (illustration: author).

and Egypt (5.8%), reported much higher case fatality rates around that time.

These data were only indicative, but the widespread economic impacts of the pandemic were indisputable. The real GDP growth rate for most countries in Africa plummeted. Both consumer prices and current account deficits spiked. Africa's 2020 funding gap of \$100 billion was expected to double by 2021 (*Economist*, 2020c). For countries such as South Africa, the budget deficit more than doubled in 2020/21 (*Economist*, 2020g).

The Economist's account of COVID-19 in Africa was interspersed with its wider global analysis. As Table 1 shows, COVID-19 news pervaded the newspaper. All sections published COVID-19 stories. Figure 1 shows that the number of COVID-19 news stories decreased sharply in 2021.

However, as Figure 1 shows, from January to December 2021 *The Economist* continued to publish articles on COVID-19, including specials on Africa (see Figure 1). Even if this treasure trove of news in 2021 represented only about 33% of the volume of news about COVID-19 in 2020, *The Economist* clearly covered COVID-19 quite extensively. Even in the wider media space, *The Economist* is particularly well suited for

analysis because it surpassed other leading newspapers in terms of its coverage of the pandemic. *The Economist* (2021c) itself analysed these issues in the story “The biggest story ever?” in which it stressed that “The share of *Economist* stories referring to ‘war’ reached 53% in 1915 and 54% in 1941. For the *New York Times*, it peaked at 39% in 1918 and 37% in 1942. . . . If newspapers around the world hewed closer to 35% than 55% in their reporting of the wars, then covid-19 has probably set a new record.” Thus, the economic analysis of COVID-19 in this newspaper is clearly notable.

News articles that prioritized Africa were found in the Middle East & Africa section. About thirty COVID-19 articles were published on Africa between 2020 and 2021. COVID-19 stories that were published elsewhere in the newspaper also included relevant content on Africa. Table 2 provides a sample of COVID-19 Africa-centred articles in *The Economist*. Compared to the more than five hundred stories in *The Economist*, the number of news articles on Africa might look small, but *The Economist* produced a sufficient number of articles to indicate how the newspaper analysed Africa's urban economy.

In general, *The Economist's* analysis of the urban economy was both thin and misleading. Focused largely on an analysis of resource-based economies, informal economies, and the eco-

Table 2: Some COVID-19 news in *The Economist* directly related to Africa, 2020–2021.

| Title | Date |
|--|--------------|
| Covid-19 in Africa: Doses of scepticism | 24 Apr. 2021 |
| Poaching: Unhappy hunting grounds | 3 Apr. 2021 |
| Vaccine manufacturing in Africa: Home brewing | 8 May 2021 |
| Democratic Immunity: Of coups and covid jabs | 14 Aug. 2021 |
| Covid-19 in Africa: Third time unlucky | 3 Jul. 2021 |
| Health care in Africa: Picking their slots | 27 Nov. 2021 |
| The Omicron variant: Omicro-aggressions | 4 Dec. 2021 |
| Poverty: Rich slum, poor slum | 19 Jun. 2021 |
| States of emergency: Stay home or be whipped | 4 Apr. 2021 |
| Covid-19 in Africa: The long game | 16 May 2020 |
| Egypt's economy: Riders wanted | 23 May 2020 |
| Food distribution: The race to feed Africa | 25 Apr. 2020 |
| Debt relief: Thanks, but no | 6 Jun. 2020 |
| Covid-19 in Africa: Testing times | 20 Apr. 2020 |
| South Africa: Measuring the poverty pandemic | 18 Jul. 2020 |
| Coronavirus in Africa: Not immune | 28 Mar. 2020 |
| Africa and covid-19: At the end of the line | 6 Feb. 2021 |
| The pandemic in Africa: One million and not counting | 8 Aug. 2020 |
| South Africa and the IMF: Fund facts | 1 Aug. 2020 |
| Africa: Leaders and misleaders | 2 May 2020 |
| Benin: Voodoo v virus | 9 May 2020 |
| Fiscal ill-health: Debt and disease | 11 Apr. 2020 |

Source: author.

nomics of slums, *The Economist's* analysis was based on three claims. First, because the pandemic was accompanied by a fall in oil prices, a substantial number of people were being pushed into extreme poverty. In “At the end of the line” (see Table 2), *The Economist* stated categorically in 2021 that “In most African countries commodities account for at least 80% of goods exports, so lower prices hurt.” Again, *The Economist* noted that most of the urban economy is informal. In another article, “Rich slum, poor slum” (*Economist*, 2021a), *The Economist* claimed, “Most of the world’s worst-off slum-dwellers are in poor countries Those who live in them tend to have informal jobs: hawking snacks In poor countries, they get little support of any kind. In Nairobi, curfews have been imposed to slow the spread of covid-19. Those who have broken them in their efforts to make enough money to survive have been beaten up by the police.” This point was reinforced in the article “Stay home or be whipped” (*Economist*, 2020r). *The Economist* presents the two economies – formal and informal – as distinct. “Restrictions on movement and commerce will be especially harmful to workers in the informal economy – that

is, most of the African labour force. Roughly 85% of workers do not receive a regular reported wage” (*Economist*, 2020j).

As Table 2 suggests, the urban economic analysis was thin. The priority of economic analysis was national or regional, but when semblance of urban economic analysis was offered, it was based largely on the principles of scarcity and mechanism, two key features of mainstream economics (Commons, 1924: 1–10; Darity, 2023). “The main reason . . . is simple: a lack of supply”, noted *The Economist* (2021c) in “Third time unlucky”. Thus, the number of people, the quantity of healthcare facilities, and the age of Africans dominated the newspaper’s analysis. Articles like “Health care in Africa” and “The long game” (see Table 2) illustrate the point. The scarcity principle was used in a different way, too: to contend that demand is also a problem. In “Doses of scepticism”, *The Economist* makes a startling claim: “Yet supply is not the only problem. Many African countries are struggling to use their doses because of operational failings and low demand” (*Economist*, 2021b). This story referred to vaccine hesitancy, but what was at issue is the principle of scarcity, which *The Economist* used for both the supply- and demand-side analyses.

Two special issues of *The Economist* prioritized Africa (*Africa’s long Covid: The toll on growth*, 2021) and the emerging world (*The next calamity: COVID-19 in the emerging world*, 2020). Both issues included articles that contribute to the total amount of data described in Table 1. These articles are, again, thin on urban economic analysis. The 2021 issue engages in little or no urban economic analysis. One of its articles, titled “Economic analysis”, prioritizes the continental, national, and global, but not the urban. The focus on Africa is predominantly about national resource-based economies. In turn, the 2020 special issue only mentions cities briefly by analysing slums.

However, research on the urban economy of resource cities in Africa (Obeng-Odoom, 2014) offers a more nuanced experience. Windfalls from the sale of natural resources can be quite concentrated in the hands of a few people. Oil revenues are often captured by transnational oil corporations and absentee propertied classes. So, the bust in this windfall, described in *The Economist*, hurts, but so does a boom. In contrast to the suggestion by *The Economist* that “a falling tide sinks all boats”, a fall in property prices as a result of a bust tends to be propitious for those urban residents marginalized in resource cities. *The Economist* also caricatures when it assumes that informal economies are distinct from slums – that where people live and work are separate. Some slums are, but many more are not. It is settled that slums and informal economies are intertwined in Africa (e.g., Hart, 1971; Obeng-Odoom, 2011). Thus, working from home is common in many slum areas. Urban informal workers have also often earned wages in the formal economy.

This lack of nuance and complexity also misinforms elsewhere. Consider *The Economist's* emphasis on how slums spread disease. Kibera, for example, is recurrently referenced in “Rich slum, poor slum”. *The Economist* points to Soweto, Alexandra (slums in Johannesburg, South Africa), and Makoko (a slum in Lagos, Nigeria) in “Not immune” (*Economist*, 2020j; see also Table 2). Housing in cities in Africa is neither mostly decrepit, nor largely overcrowded. There are a substantial and rising number of gated housing estates in African cities, which Uduku (2010) has called “the default condition” in Lagos, Nigeria. The evidence (Grant, 2009; Obeng-Odoom, 2014, 2018; Ehwi et al., 2022) also shows that in Accra and Sekondi-Takoradi, Ghana, such housing is becoming increasingly common. A resilient form of compound or family housing, and many other forms of rental housing facilities, are also common (see Tipple et al., 1997; UN-Habitat, 2009). *The Economist's* focus only or mostly on slums shows a bias.

The Economist is more even-handed in its report that export markets linked to oil extraction also slumped. The Brent crude oil price, typically used as a benchmark of the state of the oil market, was \$40 per barrel, much lower than the \$100 or more per barrel benchmark, which indicates a bullish market. It was expected that the price of \$40 would remain in 2021, but, if it rose at all, it might hover around \$55 per barrel until 2050. Similar concerns apply to gas, for which the Henry Hub benchmark average of \$4 has declined to \$2.90 per million British thermal units (*Economist*, 2020g). The Nigerian economy, heavily dependent on oil, was expected to shrink by 3.2% in 2020 (*Economist*, 2020a). Per capita incomes were also affected. In Algeria, where the pre-COVID per capita income was \$5,600 in 2012, it fell to less than \$4,000 in post-COVID 2020 (*Economist*, 2020g). Surveys by *The Economist* (2020i) showed that about 80% of Kenyans lost income as early as April 2020.

Remittances were used to provide a buffer during past economic downturns. However, such remittances nearly dried up during the period under study (*Economist*, 2020b). One money-transfer company in the UK, for example, witnessed an 80% decline in remittances sent to East Africa, and another in Italy recorded a 90% decline in remittances sent to Africa. The Nigerian Central Bank reported that remittances, which usually made up 6% of the Nigerian GDP, shrank to 3% as early as February 2020 (*Economist*, 2020h). As the experience of Kampala showed, the decline in remittances was both international and internal because not only global but also local migrants were struggling to send remittances (*Economist*, 2020h).

These socioeconomic and health crises had uneven socio-spatial ramifications; a point made by *The Economist*. In general, economically insecure groups were hit the worst. Although

some well-off politicians also experienced health problems, the impacts of the cumulative health, economic, and social problems fell more heavily on migrants, urban residents that live hand to mouth, racial and ethnic minorities, women, beggars, and disabled people. In South Africa, 66.7% of those that lost their jobs between February and April 2020 were women, especially black women. Around the same time, blue-collar workers in South Africa were three times as likely to lose their jobs as white-collar workers (*Economist*, 2020g). These problems have wider spatial, social, and ecological ramifications. Some of those that lost their jobs during the lockdown in Accra, in southern Ghana, returned to northern Ghana. Others moved from the city to the countryside. In South Africa, at least, some five to six million did so between February and April 2020, placing new pressures on rural economies and livelihoods (*Economist*, 2020g).

Many of these claims by *The Economist*, while informative, are national or regional, not urban. Considering the urban along with the national, continental, regional, and the global is critical to develop a fuller appreciation of African economies. Regarding remittances, urban research (Obeng-Odoom, 2022a) shows that housing-related remittances ebb and flow. When building their homes, African migrants increase or decrease their remittances, for example, based on exchange rate fluctuations. Because such remittances are concentrated in some cities in particular regions, the urban and regional distribution of decline differ substantially (Obeng-Odoom, 2022a). Combined with the evidence (see Ampah, 2023) that remittances from the urban economies in Africa also support urban life in the Global North, *The Economist's* reporting again misrepresents African (urban) economies.

3.2 (Urban) economic recovery (third research question)

The Economist's approach to (urban) economic recovery is consistent with its methodology. It pays limited attention to African urban economies. Simultaneously, this methodology advocates growthism (see *Economist*, 2020h, 2020m, 2020r). Within these broad parameters, *The Economist's* recommendations ranged from monetary and fiscal policies to welfare policies, philanthropy (aid in cash, vaccines, and other donations such as corona testing kits), and obtaining low-interest loans from the IMF and the World Bank (the 2020 and 2021 special issues mentioned above).

To *The Economist*, this approach is a synthesis of the best evidence about how to resolve the COVID-19 crises in cities (*Economist*, 2020s). Thus, as Harjuniemi (2019: 494) has argued in a different context, *The Economist* seeks to claim that its approach is post-political, natural, and the only modern

way. In terms of breadth, at least, this claim must be taken seriously and, because *The Economist's* approach takes into account a wide range of economic and health concerns (see other sector analyses in *Economist*, 2020i, 2020m), probing how *The Economist* reported these issues matters. Starting with what *The Economist* calls “economic medicine” (*Economist*, 2020n, 2020o), centred on growth, export-led growth, and the formal economy as a “growth pole” (*Economist*, 2020c), this economic medicine is to be taken with a combination of monetary and fiscal tools.

Engaging in quantitative easing by printing money to buy up bonds to maintain confidence and price levels in the stock markets was also recommended (see *Economist*, 2020j). Formally registered businesses needed to be taxed less to reduce their transaction costs. Governments could have usefully spent more (*Economist*, 2020o; Curr, 2020: 14) in ways that would have ensured that a “pandemic government” (*Economist*, 2020j) or the “coronopticon” (*Economist*, 2020j) was only transient and exists mainly to provide a stimulus for a return to export-led growth business as usual. However, as soon as possible, austerity needed to be restored (*Economist*, 2020c, 2020q) to shift the focus of economic policy away from the political economy of Keynes to the economics of Friedman (*Economist*, 2020q). Thus, writing in his capacity as the lead writer of *The Economist*, Henry Curr considered that the right response was to restore free-market capitalism (Curr, 2020: 14).

The health policy advocated by *The Economist* was also fundamentally about restoring growth. A primary assumption was that all healthcare is delivered by the health system, whose primary role is to support free-market economic growth. Thus, according to *The Economist* (2020d), “African health systems will tend to be overwhelmed at an earlier point than those in Asia or Europe” because African health systems have scant staff and are cash-strapped.

Diagnosed that way, the solution to the health crisis in cities was quite straightforward (*Economist*, 2020n). The interest was to create a self-sustaining business in which the entrepreneurs included researchers, medical professionals, and philanthropists (*Economist*, 2020j, 2020p; Curr, 2020; see also for the case of vaccines *Economist*, 2020h, 2020j, 2020o, 2020v, 2020w).

The Economist invited businessman Bill Gates to reflect on the pandemic. Signalling the place of scarcity and, hence, philanthropy in mainstream economic analysis, Gates wrote, “I believe that humanity will beat this pandemic, but only when most of the population is vaccinated” (Gates, 2020: 69). *The Economist* suggests that cities can manage themselves more efficiently when it emphasises the principle of scarcity

(*Economist*, 2020m). To manage scarce resources, for example, urban land must be privatized to ensure the sustainable and wise use of landed property. According to *The Economist*, “Covid-19 highlights the harm that insecure property rights cause. Evictions and land grabs are rising”. Thus, Africa would “need growth-boosting reforms more than ever” (*Economist*, 2020u). The bigger issues here, then, are not COVID-19 or vaccination, but economic principles of scarcity and private property.

The Economist combined this ideological commitment to scarcity and private property with a subtle advocacy for increased welfare policies in times of pandemics. Consider the following specific examples given by *The Economist* to buttress the point. The government of Kenya rolled out an initiative to employ more than 26,000 youths on a temporary basis as a way of supporting people during the pandemic (*Economist*, 2020c). Both in Tunisia and the Democratic Republic of the Congo, direct cash was transferred to the poorest by the government to boost effective demand and maintain economic growth, although the amount was quite small per capita (*Economist*, 2020c). The government of the Democratic Republic of the Congo gave \$50 million to two million people in Kinshasa and elsewhere. Each recipient had only \$25 to spend compared to an average government cash transfer of \$695 in wealthier countries (the UK, France, and US; *Economist*, 2020c). South Africa offered about 600,000 people social security payments, but the number of beneficiaries was much smaller than the fifteen million people the social security system was supposed to help (*Economist*, 2020g). The South African government also promised tax holidays for private businesses, but only if enterprises retained and paid their workers. The South African Central Bank also extended credit lines to businesses to facilitate operation (*Economist*, 2020j), but that strategy could be widened.

Seychelles offered salary guarantees to private sector employees for three months (*Economist*, 2020j), but no further. Social protection schemes in Africa were adopted, but only in South Africa and Kenya (*Economist*, 2020j). The Egyptian government offered underemployed informal workers some money, but it was for only three months and it was only one-third of their pre-COVID-19 weekly average (*Economist*, 2020i). Egypt instituted a 1% corona tax, which would be pumped into the cash-transfer scheme, but this scheme reached only 10% of the population. The Egyptian Central Bank provided soft loans to tourist businesses to the tune of \$3.2 billion, but the loans had to be paid back after two years (*Economist*, 2020i). This reportage is clearly informative, but it is neither consistently linked to the urban economy nor connected to the complexities of African urban economies or even cities generally.

4 Discussion: Wrong diagnosis, wrong medication

Analysing the urban economy is critically important not only in itself but also to appreciate the national, rural, regional, and global economies. The urban economy is not merely a reflection of the national economy. Pivoting from national economic analysis to making urban economic claims is a hazardous exercise. Although linked (e.g., Njoh, 2003; Obeng-Odoom, 2010; Ahimah-Agyakwah et al., 2022), African urban and national economies must be studied empirically (Obeng-Odoom, 2014), not based on projection or conjecture from the national or the regional.

Because African economies are urbanized, the pressing questions are as follows: how much and how well did these economic analyses reflect Africa's highly urbanized economies? Did economists pay attention to the spatial economy in Africa? How well did they do so? Do the resulting proposed economic policies reflect the spatial economy in Africa? To address these questions, a content analysis of about five hundred articles in *The Economist* produced surprising results. *The Economist's* coverage is, indeed, extensive, but not exhaustive. Economic analysis is mainly limited to the national, without systematically considering the urban and the sub-national in Africa. Emphasising growth problems over the more pressing challenges of urban inequalities and social stratification is both methodological and ideological, but poorly empirical and hardly systematic.

In the few instances of urban economic engagement, methodologically, *The Economist's* analysis of cities is rooted in mainstream urban economics with certain dualistic views about the nature of urban economies in Africa, and an emphasis on growth and scarcity. *The Economist's* approach fails partly on account of "spatial separatism" (Gore, 1984/2012), partly on account of "temporal myopia" (Santos, 1979/2018: 12) because of its limited historical analysis of resource economics in Africa, and particularly on account of limited appreciation of spatio-temporal dynamics in Africa. More fundamentally, *The Economist's* misunderstanding is not simply a reflection of lack of awareness, but also an expression of ideological spatial interests. Undergirding these problems is *The Economist's* Western modernist ideological bias (Obeng-Odoom, 2022b). Three structural limitations emerge from this orientation. First, the emphasis on growth in a continent whose greater problem is mass urban social stratification and inequalities (Obeng-Odoom, 2020a, 2020b) signals a lack of congruence between the economic medicine and the real disease.

Second, although they are integrated into the global economy, African urban economies function in an unequal circuit both locally and globally. Locally, the dominant informal economy exists as a basement of dynamic but local organized labour groups struggle to appreciate vulnerable labourers' working conditions. The firms are a mixture of medium-scale profit-making groups and social enterprises with little or no control over the technology that they use (Grant, 2009; Murphy & Carmody, 2015, 2019; Yeboah et al., 2022). These uneven socio-spatial relations are also reflected in the relationships that connect national or federal capital cities to district and regional capitals (Dickson, 1993). Globally, African urban economies seem to serve the global cities economy, characterized by the richer but concentrated formal economy dominated by transnational corporations. Other oligopolies are much larger, more professionalized firms whose interest is to extract increasingly more value and revenues from the dominant but less powerful informal economy in Africa (Grant 2009). Thus, more export-led growth would worsen inequalities, which, in turn, inhibits poverty reduction (Fosu & Gafa, 2020).

Third, targeting formal firms on the assumption that they would be growth poles for the rest of the economy misunderstands the nature of the relationship between the formal and informal economies in Africa. Systematic research (Peil, 1972: 23–40; Santos, 1979/2018; Bryceson & Potts, 2006; Songsore, 2011; Ablo, 2015, 2020) over the years has shown that most private enterprises in the formal economies are export-oriented industries whose costs of business are subsidized by the informal economy. Formal resources or resort enterprises are mostly foreign-owned or linked, mostly profit-oriented, and mainly located in areas where there are the greatest agglomeration economies. These firms control the urban economy, perpetuate the urban economic hierarchy among domestic and foreign firms, create a labour aristocracy (Grant, 2009; Murphy & Carmody, 2015; 2019; Yeboah et al., 2022), and are mostly answerable to a class of absentee owners, as Thorstein Veblen put it (1923/1997). Many of these urban oligopolies offer weak or no contracts, workers are usually forbidden to unionize, and they work under challenging conditions. The informal economy has shrunk with the growth of the formal economy, but the new small-scale local enterprises are largely dependent on the formal economy, largely controlled by absentee owners.

5 Conclusion

Whether mainstream urban economics can be applied to the Global South is an important question, but, beyond academic debates, the question must be addressed empirically. The substantial coverage of the COVID-19 pandemic in *The Economist* provides a useful test case. Did economists pay attention to the urban economy in Africa? How well did they do so? Do the resulting proposed economic policies reflect the generalities and special features of the spatial economy in Africa? A content analysis of *The Economist's* news shows that the newspaper's focus on urban economies in Africa is thin and that its current application of mainstream urban economics is highly problematic. These are surprising results. Liberalism does not imply a bias against urban economic analysis, a forte of mainstream urban economics. The limitations of mainstream urban economics are well known in the literature (e.g., Stilwell, 1995; Zhang, 2015; Munro, 2022), but their magnitude in *The Economist* is surprising.

Urban economies in the Global South require further analysis. In principle, urban economics is needed to illuminate the nature of these economies. However, mainstream "urban economics' preoccupation with spatial equilibrium and optimization" (Zhang, 2015: xvii), reflected in prioritising growth, scarcity, and capital accumulation, stand in the way. New approaches are needed to study urban economies and economics in the Global South.

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UDC: 711.4-122(238.1)
doi:10.5379/urbani-izziv-en-2023-34-01-05

Received: 23 March 2023
Accepted: 29 May 2023

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Coexistence between design, regulation, and negotiation in urban planning: The case of Buenos Aires, Mexico City, and São Paulo

Studies commonly reiterate that urban planning complexity is defined by the coexistence of three elements: regulation, various scales of urban design, and multiagent negotiations. We confirm this; however, we reject the idea that they can ideally interact in perfect balance with no negative impact on each other. Thus, this article analyses the limits of coexistence of these elements. We hypothesize that perfect and balanced coexistence is not possible. This is based on four main and consecutive activities: 1) a literature review concerning the roots we believe contemporary urban planning is based on; 2) a critical and qualitative analysis of the main documents containing ur-

ban planning directives currently in use by the three largest cities in Latin America (Buenos Aires, Mexico City, and São Paulo) focused on the guidelines established by these documents and how they communicate with each of the three pillars; 3) identification of controversies and convergences in the interaction between the three pillars; and 4) elaboration of conclusions.

Keywords: urban planning theories, urban planning concepts, urban planning instruments, collaborative urban planning

1 Introduction

Planning theory grounded in practice is especially challenging (Bolan, 2017). This is mostly explained by the variability of social interactions and the constant conflicting interests that urban reality imposes. Not only the trajectory of planning to concrete facts may be constantly questioned, but it may be doubted whether its purpose is useful. Alfasi and Portugali (2007: 175), for instance, suggest a certain mistrust of the meaning of planning itself: “can planning offer a solution, or is it just a matter for critical geographers to investigate?” The intellectual beauty of planning is that it implies active transformation and suggests the exact implementation of what was originally intended. Designed and ideally implemented by local agents, urban planning has always been subordinate to forces from outside its political and administrative boundaries, and these are increasing. The contemporary digital augmentation of the city is certainly the most recent example of an intrinsic and historic relationship. Graham (2020), despite detecting some room for resistance, describes the idea of “platform urbanism”, in which the digital tool – the platform – is unaccountable, too big to control, too new to regulate, and too innovative to be eliminated.

Friedmann (1998: 250), however, helps solve this equation of intricacy and counterarguments by saying that, “as a practical activity in the world, planning is in constant need of rethinking.” Instead of embedding theory into planning, a theory of planning needs to be constructed (Los, 2018). Planning theory and practice are not limited to looking at current phenomena, but rather at multiple possibilities of phenomena to come. Despite intrinsic limitations or practical infeasibilities, the self-justification of planning theory and practice is tempting. In fact, these two contrasting aspects alternate in urban regulation, urban design, and negotiations. It would be interesting if they could better interact.

We begin this study by discussing the three elements of the urban planning process and how each one influences the others. For example, the regulatory approach ranges from general rules for organizing activities across the entire city or in selected compartments to detailed land-use and occupation determinations (Bertaud, 2018). At both levels, regulations are influenced by various social, economic, environmental, and circumstantial features and, consequently, negotiation is (ideally) always present, or at least unavoidable. Similarly, when regulation and design are exposed to broader scenarios in community discussions, they are unavoidably subjected to principles, ideas, and hegemonic understandings that are frequently present in theoretical elaborations. Although the

design of physical features for public spaces is often seen as a synonym for concrete intervention, it is the materialization of long and previous theoretical exercises: much less in terms of product development and much more and collectively in terms of principles, priorities, historic determinations, cultural impositions, and many other intellectual efforts.

Our scepticism toward the perfect feasibility of conciliatory and idealistic voices is echoed, for example, in the recurrent discussion on the concept of sustainability. Vogt and Weber (2019) make clear the difficulties of ideally balancing environmental, social, and economic interests or constraints. Similarly, Pengjun and Peilin (2017), in their discussion on city health, criticize the universally accepted idea that high-density development or a compact urban model could minimize GHG emissions. There could not exist such a panacea deserving our unconditional faith. The perfection of an all-purpose equation is thus criticized despite being presented as unquestionable, universal, and feasible. However, for pragmatic exercises such as the elaboration of plans, programs, and multiagent negotiations concerning urban management, the idyllic consideration of universal and well-balanced factors does play an important role and serves as an operational guide. Unconditional faith in regulation, design, and negotiation is conceptually fragile but fundamentally necessary, as are the “utopian ideas” that drive us forward.

Based on this approach, this article discusses the main constituent elements of urban planning studies to contribute to its theoretical framework: regulation, design, and negotiation. Constantly presented as necessary tools and capable of interacting in an ideal and simultaneous way, the main objective is to analyse the limits of coexistence of these elements. Our hypothesis is that a perfect and balanced coexistence is unfeasible. To develop the bases of this reflexive process, the article is structured into three main sections: 1) The three pillars of urban planning, 2) Three Latin American references, and 3) Dilemmas of coexistence: negotiation at the centre of planning.

Such elements may play a role when adopted in isolation, but they interact in a constant dispute of individual importance, determination of political priorities, and local specificities. The discussion is illustrated by a case study we developed in three cities: Buenos Aires, Mexico City, and São Paulo. The discussion presents the main insights and the conclusion avoids any approach that, to satisfy conceptual purity, may lead to inability or disenchantment concerning our tools (traditional and innovative) to positively change our cities.

2 The three pillars of urban planning

Designating these elements as the fundamentals of urban planning may seem pretentious and risky. Other factors also strongly influence the way urban planning is done, the way it may be done, and the chances of its success. However, the contemporary literature on urban studies repeatedly refers to three elements (termed *pillars* here) for analysing a city or technical and legal documents concerning urban topics. This section is based on the interaction of these three pillars: design, regulation, and negotiation. The conclusions show that such interactions vary between a desirable and idealized concurrence to a clear impossibility of having them equally valued.

The importance of these three pillars was demonstrated in the Burnham Plan for the City of Chicago (Smith, 2006). It presented a deliberate effort to adjust regulation, design, and negotiation. The innovation presented in terms of community participation was connected to the government practice of creating zoning parameters and legislating on private property (Cheng & Chambliss, 2016). Moreover, the design was fundamental to stimulate public interest and community agreement with the ideas in the plan. The strategy to acquire popular acceptance using design was part of the plan itself (Moody, 1912), as pointed out by Cheng and Chambliss (2016).

A primary criticism of traditional land-use plans or strictly regulated zones, which attempt to mould the urban environment by imposing regulations on space and time, stems from an analysis of the present conditions and the use of prescriptive methods. Portugali (2008) notes that the chief criticism of land-use plans or over-regulated zones is that these processes fail to consider cities as open, complex, and self-organizing systems. This argument raises a further question: if planning fully considered such attributes, would it still be able to achieve its goals? Could planning adhere to its main purpose amid considerations that seem to question its very core characteristic: the regulation of people and activities in urban space?

Acknowledging the unreliable nature of regulatory master plans and consequently advocating for “inertial, spontaneous development of urban areas” would lead to an entropic state, according to the principles of system dynamics. As Mashinsky (1990: 93) explains, this means that “the quality of a city as a complex system necessarily declines with spontaneous, inertial development.” Regulatory master plans, like all regulatory guidelines, offer the alluring promise that reality will bend to technical intentions through corrections in the creation and implementation processes. Portugali (2008) insists that we still need to find ways to identify the need to plan and regulate urban settlements. Savini et al. (2014) urge us to go beyond

the paradox between centralized control and self-organization to develop creative ways of integrating planning with the complex, interactive, adaptable, and self-organizing system that is a city. These considerations lead us to not exactly defend an ideal combination between the components of urban planning, but to at least consider their important intricate coexistence.

It took a long time for planners to consider the policy sphere as part of the planning realm and people as part of the decision-making process. In the late 1950s, after decades of modernist prescriptive plans, Crane (1960: 284) saw “environmental morality”, “the interdependence of humans and nature”, “public city-form decisions”, and “choice and flexibility of individual usages” gaining strength within the planning profession. At the same time, Jane Jacobs brought non-specialists and local communities into the planning process (or perhaps into city management), challenging the usual discussion on urban policymaking. As a result, over the past decades, the participatory approach seems deeply linked to the planning process: old plans are criticized for their non-participatory nature, and contemporary planners emphasize that this procedure must always be exercised. Paradoxical as it may seem, this trend is surpassing the original and traditional intent of planning while leaving behind the structural underpinnings of planning itself: regulation based on technical approaches and a clear vision of the future materialized over time through design. Contemporary participatory planning seems very reluctant to establish future scenarios, and instead it responds to urgent demands.

Planning and policymaking have thus become intrinsically related. This relation has been tacitly and strategically established by ignoring the fact that, regardless of the debate, there is no single optimal solution or even standard sense of social justice that will be uniformly accepted by stakeholders operating on different scales. Even the idea of a decision made “in the majority interest” seems too fragile when seen against recurrent well-intentioned reforms around the world that still result in the concentration of poverty, exploitative processes, perpetual social misfortunes, and profit-maximizing land use. Politics is by nature conflictive, and, for this reason, negotiation is essential to find common ground amid divergent interests. These attributes of contemporary planning are obligatory for any actor involved in this process, but it is unclear whether planning can be replaced by dialog or if dialog may be the ultimate urban planning tool. If it is such a tool, does it undermine the original founding characteristics of planning? Although we believe they are at risk, we see no easy substitute: either we are unable to establish new principles and methods, or we are so attached to old procedures that despite their weak outcomes the exercise of planning still satisfies us in terms of professional justification. In the twentieth century, design, regulation, and negotiation were orchestrated according to technical

assumptions and single or “universal” solutions, but the following historical period has adopted a much more complex relation of these three elements, much more locally tailored guidelines, and much more diversified possibilities to combine them.

The third common component of the planning process is design, which is understood to be the physical features of urban spaces at different scales, from public areas such as parks to buildings and interiors. Regulatory plans may already establish some key characteristics of buildings such as setbacks, heights, and permeable areas. In these cases, physical features are dictated by urban, architectural, and engineering regulations. Design-driven planning processes are intended to influence the relationship between people and their built and natural settings.

The increasing relevance that design and negotiation have acquired in recent decades seems an attempt to counter overly prescriptive and regulative planning processes. However, a clear and strong regulatory framework is still important. Healey (2003: 104), a collaborative planning advocate, argues that regulatory power is still important “to safeguard valued environmental qualities”, and Innes (2004) highlights that a legal and regulatory framework can guarantee a balance in stakeholder negotiations. Collaborative urban design processes have been tested in many rich and poor cities worldwide, and more recent ideas on collective experiences have fuelled these initiatives. This relationship between different experts that are now expected to take part in design processes (a far more interdisciplinary group than architects, designers, and engineers) at first glance seems to respond to less centralized or regulatory planning. Kerrigan (2018) determines that this collaboration is widely defended but not frequently exercised. This is a paradoxical situation considering the confirmation of growing populations interacting, new online tools and new social media technologies for sharing information and feedback, expanding segments of consumers and professionals, a rise in civic and non-profit partnerships, and more local governments supposedly engaged in participatory processes. All these factors are clearly accepted, although more general determinations established by planning guidelines, corresponding legislation, and urban management practices are still considered. Because these remain fundamental, collaborative and collective exercises are certainly weakened. From the participatory process viewpoint, this is a rather useless effort; from a more general planning perspective, this is the sole way to consider things and people in the city. The examples presented below may shed some light on this issue.

3 Three Latin American references

The contemporary urban planning practice in the city of Buenos Aires, Argentina, is based on that of the mid-nineteenth century, paired with movements taking place in European cities such as Barcelona and Paris. At this time, the first urban planning theories were presented with Ildefons Cerdà, Reinhard Baumeister, and the works of Joseph Stubben and Raymond Unwin. Novick (2005) takes this moment as a starting point to discuss the urban plans for the city of Buenos Aires: the New Plan (1907–1911), making the design of the city a combination of aesthetics, functionality, and building hierarchy; the Organic Project of the Building Aesthetics Committee (1923–1925), already confirming the tensions between urban art and the research-based priorities; and the Regulatory Plan (1932), much more a set of isolated projects than a systematic plan.

In the late 1920s, Le Corbusier (2015), displaying his visceral self-confidence, presented the city of Buenos Aires as a hopeless place unless it experienced a strong planning reaction. The plan developed by Hardoy and Kurchan and coordinated by Le Corbusier for Buenos Aires in 1937–1938 envisaged an intervention following the modernist precepts of urban rationality and sectorization of urban land use with zoning, a transit system hierarchy, and a new business centre.

That trajectory confirms a tendency from overvaluing design in the construction of a new and “European” city followed by the adoption of more regulatory actions, and more codes for the control of public and private projects. This trajectory was still far from public participation.

To illustrate the main idea of this article, we should mention an important inflection in this trajectory that questions the importance of large plans themselves. Corti (2007) talks about the victory of a postmodern, neoliberal, and fragmented way of managing cities in the 1990s, all making the traditional plan an even weaker planning tool. As stated at the beginning of this article, urban plans commonly disappoint urban managers, researchers, and certainly the people that live in cities. They repeat themselves in a quiet trajectory of metamorphosis. In fact, Buenos Aires confirmed a series of municipal and metropolitan plans that, if not linear, were at least a historic succession of written and sketched idealized city by hegemonic groups. At the time of this article, Buenos Aires was discussing its Environmental Urban Plan (*Plan Urbano Ambiental*) approved in 2008. The new plan was to be organized according to seven main objectives (Consejo, 2023), all of them presented here to illustrate and confirm the recurrent presence of the three pillars stated above and the tendency to ascribe a high value to participation.

Table 1: The Environmental Urban Plan of Buenos Aires and the three planning pillars.

| Objectives of the plan | Planning pillars detected |
|---|--|
| To improve the population's quality of life | Mostly negotiation, some regulation, and some design |
| To promote more equitable development of the city | Mostly negotiation, some regulation, and maybe some design |
| To generate consensus among various stakeholders in institutional mechanisms | Negotiation |
| To promote more social, environmental, economic, and urban-planning efficiency in public and private investments | Mostly regulation, some negotiation, and maybe some design |
| To provide a legal and institutional framework to guarantee integrated jurisdiction between the municipal and metropolitan levels | Negotiation |
| To ensure that all people have proper access to healthy air, water, and food, can safely circulate, live free from pollution, and are offered open spaces | Mostly regulation, some negotiation, and maybe some design |
| To protect the cultural, architectural, and natural heritage of the city | Some design but mostly regulation |

Table 2: The General Urban Development Program of Mexico City and the three planning pillars.

| Objectives of the programme | Planning pillars detected |
|--|--|
| To stop corruption by giving people more opportunities for popular expression | Some negotiation, some regulation, and no design |
| To secure more resources to provide infrastructure and public services | Mostly negotiation, some regulation, and maybe some design |
| To force developers to provide urban infrastructure when creating new urban areas | Mostly regulation, some negotiation, and no design |
| To discuss large urban projects with local communities | Negotiation |
| To simplify land-use permit processes | Some regulation, some negotiation, and no design |
| To promote conciliatory dialogues between neighbours | Negotiation |
| To promote mixed use with at least 30% of social housing construction in any development project | Regulation |
| To regenerate eleven heavy traffic corridors. | Design |

Table 1 shows a clear distinction from the previous plans proposed to the city of Buenos Aires, reiterating a historic trajectory commonly observed in other cities and in the recent history of urban planning: an increasing importance given to negotiation and a clear disadvantage of design. Regulation has certainly become more complex and easily performed. Further discussion is required to distinguish urban realities in different socioeconomic scenarios: large cities in poor countries, for example, cope with increasing parts of their territories totally unregulated and hardly officially designed, but tailoring new forms of negotiation.

Mexico City, born under the guidelines of the Spanish colonial Royal Ordinances (*Ordenanzas Reales*), never totally succeeded in erasing the influence of the former native settlement. After experimenting with partial proposals and urban works

in search of a cosmopolitan (i.e., French) face (see Christlieb, 1998), such as under the rule of Porfirio Díaz, Mexico City had its modern urban structure proposals in the late nineteenth century with intensification of the industrial sector and expansion of the railway network. In the mid-twentieth century, the city experienced the Regulatory Plan for Mexico (*Plan Regulador de México*) under the supervision of Carlos Contreras, prioritizing symmetry, order, regularity, and public health (McMichael, 2002). Still recognized as positive for the city nowadays, Contreras's plan is far from the present planning ideals. Perfectly aligned with the principles of his time, he understood public participation (i.e., negotiation) as valid only if submitted to technical rationality, research-based planning, and "modernization" interests (Aguilera, 2017). Such a plan, despite its approach based on Le Corbusier, was coordinated by a local team distinguishing itself from other Latin American

cities such as Buenos Aires with Jean-Claude Nicolas Forestier, Santiago and Bogota with Karl Heinrich Brunner, Caracas with Maurice Rotival, and Rio de Janeiro with Alfred Agache (Aguilera, 2015).

The plans that followed Contreras's shifted the priority to land-use regulation. In 1997, the city adopted the General Urban Development Program (*Programa General de Desarrollo Urbano*, PGDU), revised in 2002 and still valid. In 2022, the government of Mexico City submitted to the population a new PGDU for approval, immediately criticized for the short term given to the participatory process. According to Sheinbaum (2019), as mayor of Mexico City, this new plan is organized according to eight main objectives, all of them taken here to illustrate and confirm the recurrent presence of the three pillars stated above and the current value given to public participation.

The current plan for Mexico City exemplifies the consideration of a real city, very far from that desired by its precedents, either aspiring for "modernity" and "westernization" following a French model or a functionalization as taught by international modernism. Design is hardly identified, regulation is desired but recognized as never achieved, and negotiation is declared fundamental, considering that land-use control failed and technicism has proved itself unable to respond to social complexities.

In the case of São Paulo, the urban plans proposed, adopted, or partially adopted repeat what is commonly observed in most Brazilian cities:

1. A genesis referring to European models prioritizing urban beautification projects, expansions of the road system, eradication of poor areas in downtown districts, and implementation of infrastructure. Design (and regulation as its complement) was thus an ever-present concern in São Paulo's Avenue Plan (*Plano das Avenidas*) proposed by Mayor Prestes Maia, who highlighted an urgent need to modernize a city with no attributes that could attract the attention of a foreign visitor (Maia, 1930). Prior to the Avenue Plan, São Paulo had only experienced proposals for parts of its territory, such as those for the wealthy districts (named *jar-dins*) and signed by a foreign company known as The City.
2. A series of comprehensive plans proposing zoning for the entire city and starting to organize the public administration to really control urban municipal land. In the case of São Paulo, with a clear intent to regulate urban land, two plans were approved: one in 1971 and another in 1988. The 1971 plan clearly lists a series of land-use rules and zones – still based on the modernist principles of a rational and functional city – to achieve its main objectives, meaning

exclusive dependence on regulation to create a "desirable city" (São Paulo, 1971). The 1988 plan changes the rules and the zones but maintains the same tools and general guidelines (São Paulo, 1988).

3. A new form of creating urban plans in the country was introduced in the early 2000s. Under the guidelines of Federal Law no. 10257, designated Statute of the City, urban plans started a long period of negotiation that is still valid and has eclipsed any other objective an urban plan may have (Ultramari & Silva, 2017). The current plan for São Paulo is named the Strategic Master Plan, adopted in 2014 and clearly committed to the public participation as stated in its own presentation (São Paulo, 2023). As we observed in the Environmental Urban Plan of Buenos Aires (under discussion), the current plan for São Paulo is being created according to a set of principles. Similarly, we take these principles – formally stated in the document and commonly repeated by public administration representatives – as references to confirm the competitive coexistence of the main urban pillars.

As shown in Table 3, negotiation is certainly the most important attribute of São Paulo's current urban development plan. It repeats and sometimes reinforces what was done in its predecessor in 2014 when negotiation was confirmed by its propositions, its presentation by the municipality, and mostly by the process it adopted: more than twenty-five people involved, ten thousand suggestions from various social agents, sixty public hearings, and full transparency of every event (São Paulo, 2014).

As we enumerate the urban plans developed over time for each city, many similarities can be observed between Buenos Aires, Mexico City, and São Paulo in their planning approach. In addition to being Latin America's largest cosmopolitan cities, which creates a certain proximity from the historical point of view, the three pillars of urban planning at the core of this article's discussion (regulation, design, and negotiation) coexist, each one having more or less relevance in each planning period of these cities in a similar way, offering the possibility to compare and analyse them chronologically. Whereas the earliest plans had a strong design approach including modernist influence (Buenos Aires with its New Plan in 1907–1911, Mexico City with its Regulatory Plan in the mid-twentieth century, and São Paulo with the Avenue Plan proposed by Mayor Prestes Maia in 1930), in the following plans design has gradually taken a back seat, placing more emphasis on regulation and more recently on participation (the Environmental Urban Plan of Buenos Aires, approved in 2008 and under discussion since 2020; Mexico City with its General Urban Development Program, created in 1997 and revised in

Table 3: Strategic Master Plan of São Paulo (in preparation) and the three planning pillars.

| Objectives of the plan | Planning pillars detected |
|---|--|
| To guarantee social justice | Mostly negotiation, some regulation, and maybe some design |
| To improve the quality of life | Mostly negotiation, some regulation, and some design |
| To guarantee more rational use of natural resources | Mostly regulation, some negotiation, and maybe some design |
| To guarantee public participation in decisions involving the future of the city | Negotiation |

2002, still valid; and São Paulo with its Strategic Director Plan, adopted in 2014, and still valid and being revised).

Regulation and popular participation increased in all three cities over time, drawing attention to the growing importance of negotiation and the range of issues that are becoming part of urban planning in an interdisciplinary arrangement. Platform urbanism is a challenge and has brought even more complexity to urban planning and the way it may be done. It has become increasingly complex to deal with the coexistence of the three fundamental pillars in association with new relevant aspects such as environmental and social issues, the growing participatory process, and the mix of planning and policymaking, and this is a challenging contemporary issue in urban planning.

4 Dilemmas of coexistence: negotiation at the centre of planning

Regulation is intended to secure fundamental rights directly related to the natural and built environment, while still leaving room for adaptations resulting from open negotiations between multiple stakeholders. Although noble in intent, as even the opponents of regulation can attest, in practice land-use regulations may also limit access to urban land by low-income classes (White & Allmendinger, 2003) or ethnic minorities (Whittemore, 2016), and, undoubtedly, back financial sector interests. Alfasi and Portugali (2004) argue that over-regulated plans are a “just-in-case” approach: in other words, a comprehensive set of regulations to be used if any potential phenomenon comes to pass in the city. On the other hand, a “just-in-time” approach is more amenable to unforeseeable events, using only minimal and adaptable regulations. This is another example commonly accepted as a hallowed principle and yet rarely implemented correctly, although it is difficult to determine who has the right to judge its correctness. Again, regulation provokes similar reactions: either we reject it as an ineffective tool for controlling society and social spaces, or we are lured in by its promises while still recognizing the need for reform.

Strategic reform could begin with a partial deregulation of land; the question then arises which regulation to eliminate and which to retain. In this scenario, transparent and resilient regulatory frameworks are intended to mitigate power imbalances between different stakeholders acting on multiple scales, in what Alfasi and Portugali (2004: 34) refer to as a “para-polity . . . that is not evident in formal documents, but that accumulates implicitly as a result of individual decisions.” Fainstein (2000: 458) explains that during negotiations it is often the case that “the power of words depends on the power of the speakers”, while Innes (2004: 12) reaffirms that “everyone at the table knows who is powerful outside, who is not, and what power each player has.” From this discussion arises the negotiation dilemma: it limits regulation and is limited by design. Negotiation is consequently necessary for both regulation and deregulation, and it includes stakeholders across multiple scales: from government organizations, grassroots movements, and international organizations to private actors (Holsen, 2020).

Although techniques may vary, the essence of planning remains: an idealized scenario attained through predefined rules. Today, a major criticism of planning processes is that they are essentially “design-less” (Bertaud, 2018), although building ordinances included in regulatory planning could be considered indirect design (Talen, 2012). According to Barnett and Chafee (2008: 11), local land-use regulations are a “literal prescription for most new development”, influencing the “design of every community.” Thus, we are faced with the regulation dilemma: it limits design and is limited by negotiation.

In different scenarios, advocates of collaborative planning have increasingly emphasized the role that design can play in planning processes (Carmona, 2013; Abd & Asaad, 2021). Similarly, Fainstein (2000) acknowledges that New Urbanists, despite their formalistic and exclusive approach to design, can successfully translate principles of urban design into regulatory frameworks and consequently involve communities in the planning process. In addition, Bond and Thompson-Fawcett (2007) criticize “neo-traditional urbanism” for being a cooptative rather than a collaborative process; at the same time, they maintain that the extensive use of charrettes by New Urbanists

has reinforced the importance of design in the urban planning domain.

Even though “it has taken urban design a long time to establish a major role in planning practice in developed countries”, by the 1990s it was a well-established field (Punter, 2007: 168). However, the complexity of planning processes – which involve a variety of actors with different and often conflicting interests – is rarely considered in design proposals. As Punter (2007: 169) points out, urban design has been co-opted by public authorities to “aestheticize megaprojects”, whereas “more democratic, egalitarian and sustainable design practices are being eclipsed.” Design, as the concrete visualization of urban planning idealization, constitutes a double-operated process: on the one hand, it reduces the complexities of the negotiation by previously selecting one possible choice, the preferred one, and on the other hand it facilitates the necessary persuasion, making some proposals more attractive than others. With its unique ability to condense different urban features and identify different possibilities for the urban environment, design can be a powerful catalyst in the planning process, exploring many combinations of different temporal and spatial scales. The design dilemma is thus as follows: it limits negotiation and it is limited by regulation.

This dilemma can be observed in most examples used to illustrate a new design format, either in combination with planning and negotiation or as a solitary practice in urban management. Originally evoked by Manuel de Solà-Morales, the concept of urban acupuncture was further theorized and practiced by Lerner (2014) during his three terms as mayor of Curitiba, Brazil. Given its relatively low cost, high impact, and reliance on community development, this type of pinpointed intervention has spread across developing countries (Fabricius, 2011). As Burdett (2012: 94) notes, one of the strengths of urban acupuncture is its “resilience and adaptability of urban and architectural form that allows a greater sense of attachment and identity for the local community of users.”

Among the three dilemmas identified, it is highlighted that only the negotiation dilemma is always present in planning. Any land-use plan includes some level of negotiation, either more candidly stemming from “backstage” interests before coming into force or more explicitly in an open dialog with various stakeholders. This means that negotiation is central and fundamental in planning, so that it is not possible to apply planning without negotiation, but it is possible to do it without regulation (design planning) or without design (regulation planning). Thus, negotiation is the central pillar of planning. This fact becomes clear when analysing the historical reality of the three largest cities in Latin America.

5 Discussion

As mentioned in the introduction, this critical analysis of planning processes was prompted by the fact that three aspects of planning – regulation, design, and negotiation – influence each other and urban life in general. Understanding each of these components and their interrelations demonstrates how they share influence in defining cities. A critical overview of the roles played by regulation, design, and negotiation in contemporary discussions on planning is the underpinning for the framework presented here.

The proper combination of the three elements discussed here may sound like the perfect recipe for the ideal city. However, adoption of the principles assumed to be correct in a more general urban scenario may constitute fatal circumstances for such combinations in specific cases. Again, conciliatory consideration is involved, both in theory and practice, because urban matters are the ultimate context for potential controversies. Our understanding is that the challenges involved in equitable distribution of priorities and needs cannot influence our decisions in terms of what planning to adopt or what combination of components is required. Quite the contrary: the ideal city, regardless of what it is or how achievable it is, should be the sole guide in any effort to change the city. The importance of the three pillars of planning discussed in this article consists in the fact that the way these pillars are conceived can either extend or reduce the boundaries of the ideal city we can imagine. By discussing the intricacy of the three main elements of urban planning, we can ultimately understand how urban idealizations are thought about and sometimes implemented. However, desire, principles, and idealisms are necessary tools for planning a city, even though they are always transmuted when concrete efforts are implemented.

The three largest Latin American cities selected for this discussion – São Paulo, Mexico City, and Buenos Aires – have a very similar European colonization background and, despite their local differences, have shown similar approaches to urban planning over time. In the three cities, the growing importance of negotiation in urban planning can be observed because the current emphasis in planning has been placed more on participatory processes than on design results. Depending on the historical period of each of the cities analysed, the three pillars of urban planning were unequally combined: initially as a combination of design and negotiation and, more recently, as a combination of regulation and negotiation. Despite the different combinations, negotiation has always been present as a means of implementation, whether in the super-designed city or in the super-regulated city.

6 Conclusion

Although the hypothesis of the infeasibility of balanced coexistence between the elements is confirmed, we conclude that the search for balance is worth the effort. The search for balance, although intangible, guarantees both the necessary scepticism and the effort required to find new and important partial results. Moreover, the intentionally unbalanced articulation of these elements can set undesirable limits on the construction of the ideal city. Thus, it is possible to conclude that, even if the goal of equally balancing the importance of the three main urban planning pillars may not be fully achieved, searching for it justifies the effort. Camus (1955) sees Sisyphus's endless effort in perpetually rolling a rock up a mountain to legitimize any task we hardly believe useful in itself: we should imagine Sisyphus happy in his condemnation.

The historical similarity in terms of formal planning for the three cities of the case study leads us to think about something that is not part of the scope of this article, yet quite intriguing: as asked by Delgadillo (2014), what makes cities in Latin American countries, which have very different local, regional, and national governments, so similar in their historical trajectory regarding their plans and the way hegemonic groups tailor ideal cities? The answer is certainly not to be found in the plans, nor in local process, but rather in a larger and globalized context in which one faces a crisis in a representative democracy.

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