

CITIES

in the Shadow of Pandemic
and Climate Crisis

New quality of space and reality

Edited by
Ewelina Biczynska
and Mirosława Czerny



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People walking on Madero Street in Mexico City, Mexico, on 1 August 2020.
On that day, Mexico's Ministry of Health confirmed 9,556 cases of COVID-19 registered in 24 hours, a new record for the country. Fot. Guillermo Gutierrez/NurPhoto/EAST NEWS

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TOWARDS THE CONSTRUCTION OF A TERRITORIAL HUMAN DEVELOPMENT INDEX. AN APPROACH FROM THE METROPOLITAN PERSPECTIVE

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1. Introduction

“The true wealth of a nation is in its people” – this was the starting point for the United Nations’ Development Programme which was to have tangible implications on the development of countries. This conception has since evolved to meet national demands and has been oriented towards expanding the capacity of populations to freely engage in activities of their choice.

The index measuring human development has been used as a tool for quantifying the degree to which given environment gives human beings the possibility of enjoying their lives. It is based on three essential elements: longevity, knowledge, and decent standards of living, although certain adjustments have been made to its methodology, such as putting emphasis on strategic elements and adaptations to various territorial scales. Still, it has been approached mostly as a simple average of numerical data, without much regard to the true concept of territory and territoriality, which should lie at the foundations of the analysis of a topic as relevant as human development. Hence, the objective of the present work is to analyse the human development index in the metropolitan areas of Mexico from a territorial perspective and present a proposal for how it should be studied.

2. Methodology and data analysis

Considering that the aim of this paper is to show the relevance of the territorial factor in measuring human development in metropolitan areas, the data used are taken from the Municipal Human Development Report 2010–2015 in order to consult, process, and analyse the Human Development Index of 74 metropolitan areas for the year 2015.

The information has been systematised by stratifying the data corresponding to each metropolitan area in an Excel sheet with the use of the Dalenius-Hodges classification method (Palacio-Prieto et al., 2004) (Table 1).

Table 1. Calculation of stratification

Strata	Minimum limit	Maximum limit	Degree of human development	Frequency	%
Stratus 1	0.7030	0.7387	Very Low	9	12
Stratus 2	0.7387	0.7655	Low	11	15
Stratus 3	0.7655	0.7923	Medium	19	26
Stratus 4	0.7923	0.8102	High	15	20
Stratus 5	0.8102	0.8370	Very High	20	27
			Total	74	100

Source: Own elaboration

Subsequently, the stratification results were incorporated into SPSS to define the degree of human development of each metropolitan area, which has unveiled the territorial panorama in the country (Fig. 1).

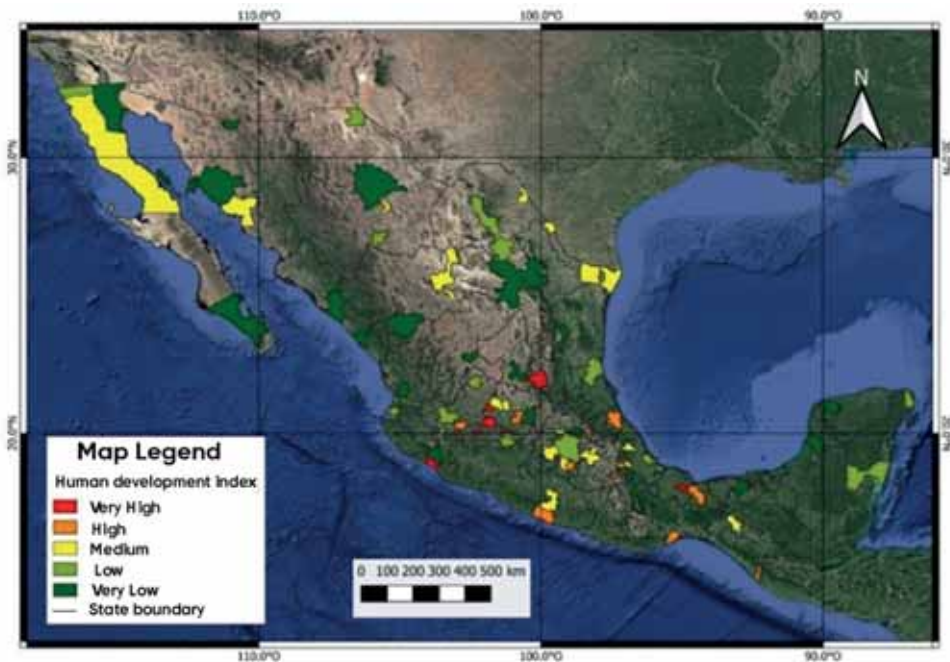


Figure 1. Degree of human development in Mexico

Source: Own elaboration

Each of the 74 metropolitan areas has particular characteristics of territorial development, varying in terms of education and health, two factors determined by income. Therefore, it is necessary to analyse human development from a territorial perspective.

Although the Municipal Human Development Report 2010–2015 reflects the state of human development at the metropolitan area level, it is essential to note that the governance at this territorial level is characterised by lack of coordination in its organisation. As a result, in terms of accessibility, the functionality of metropolitan areas is determined by inequality, which can be verified when observing the slow and uneven municipal development.

The metropolitan areas are divided into five strata according to their level of human development, each of which needs to be measured without the context corresponding to territorial similarities.

There are nine metropolitan areas that belong to the 'Very Low' stratum. It groups growing urban areas which have not adopted a comprehensive model of production and territorial management beneficial for the development of human capacities. The 'Low' stratum comprises 11 metropolitan areas in which it is primarily the regional city which develops dynamically in terms of production and territory. The 'Medium' stratum consists of 19 metropolitan zones and groups urban areas that are in transition to becoming strategic regional centres of productive and territorial development. In the 'High' stratum, there are 15 metropolitan zones with urban areas which have regional influence on crucial productive and territorial development. Finally, the 'Very High' stratum comprises 20 metropolitan areas boasting urban centres which have achieved an integral level of productive and territorial development reflected in the development of human capacities.

However, human development becomes a much more complex issue when 63% of the population is concentrated in metropolitan areas consisting of clusters of uncoordinated municipalities. As a consequence, it is difficult to ensure a harmony between territorial functionality and the human right to education, health, and decent income.

3. Progress or development, an ongoing discussion

The discussion about the difference between economic growth and development has deep historical roots. It has evolved from an initial approach focusing on wealth towards conceptualising development as a broader phenomenon analysed from various perspectives which highlight the relevance of fundamental issues such as human, natural, and institutional capacities within a long-term vision (Solano, 2007).

Although there have been theoretical and conceptual differences in the debate on the idea of development, it has been primarily conceptualised as being the product of transformations in terms of different social needs (Fig. 2).

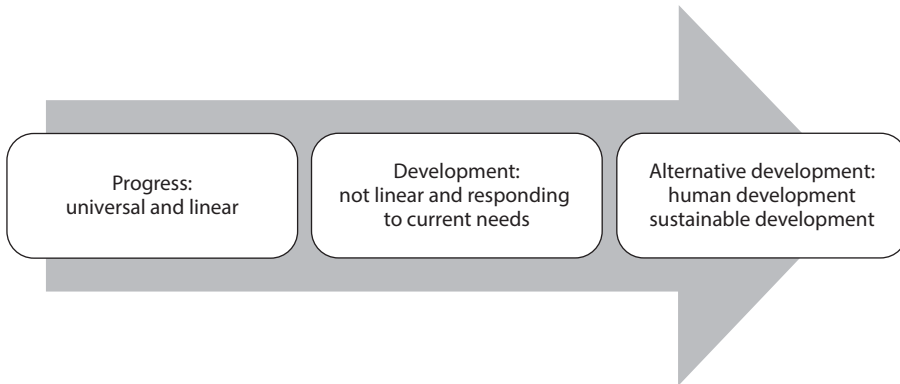


Figure 2. Evolution of the concept of development

Source: Own elaboration based on Nisbet, 1986; Gutiérrez Garza, González Gaudiano, 2010; Rojas, 2012

The term ‘progress’ can be understood as a process of constantly moving towards something better, which is dependent on random circumstances (Turgot, 1991). This idea of progress has been common for different civilisations striving for a better future – an effort that, although its goal has been to foster freedom, equality, and justice, has only served to affirm political absolutism, racial superiority, totalitarian states, and human inequality (Nisbet, 1986), all of which were reasserted by the premises of order and progress proposed by the positive discourse (Comte, 2000).

To achieve this progress, it is necessary to define its stages, understood as the phases to follow, where the urban-technological vision is positioned as the point to be reached. Historically, this “end” was based on the ideology of Europeanisation and universalisation, but since the second half of the twentieth century, these ideas have lost much validity, as they proved inoperative for explaining the causes and consequences of different negative phenomena such as wars, economic crises, dictatorships, and environmental problems (Nisbet, 1986). This is why new theories and notions have emerged, such as the one of development.

Rojas (2012) points out that great historical changes are the product of the reorganisation of the world, brought about by the loss of faith in the prevailing ideas imposed on the society and, subsequently, by opening a space for new proposals. This sets the common understanding of progress–development as synonyms in which development does not occur in a linear manner but is heralded by conflicts which bring it closer to its ultimate end, that is to say, development is immersed in modernity and the idea of a single pattern to achieve it is rejected.

In order to respond to various questions which have emerged as a product of the polarisation of countries, different theories have been proposed – their focus is specified in Table 2.

Table 2. Evolution of development theories

Classical theory	The main engine of the economy was the accumulation of capital.
Neoclassical theory	The market was the centre of economic regulation, and any state intervention was rejected.
Keynesian theory	The State should intervene and regulate all actions.
Latin American theories	Theory of the international economy (based on the centre–periphery relationship between countries), theory of import substitution (endogenous growth), and theory of the state as an expression of power (the state operates in its entirety).

Source: Own elaboration based on Reyes, 2001; Nisbet, 1986; Gutiérrez Garza, González Gaudiano, 2010

Changes within theories of development were induced by the needs and the prevailing economic model of each era, moving from a vision where development was centred on the economic dimension (classical and neoclassical) towards a conceptualisation combining the economic factor with considerations of political, human, social, and lately also environmental aspects. In this new understanding, “development must provide the entire population with opportunities to live with dignity and exercise full freedom” (Sen, 2000b, p. 12). In this sense, the inclusion of the human dimension in development is fundamental.

Human development has emerged as an alternative to measuring progress according to the GDP indicator. The proposal does away with the economy-centred approach and instead represents a holistic vision recognising that economic growth by itself is not a sufficient condition for human well-being. Consequently, it has been asserted that growth and development are related but different concepts (López Calva, Vélez Grajales, 2003; Nisbet, 1986; Gutiérrez Garza, González Gaudiano, 2010).

4. Human development

Human development is understood as a process by which people are offered greater opportunities, referring to the formation of human capacities and their use. The term, therefore, relates to the process of creating broader opportunities for individuals to achieve a higher level of well-being by distinguishing two fundamental aspects: the formation of human capacities and the way in which these are used (PNUD, 1990).

Mahbub Ul Haq and Amartya Sen (PNUD, 1990) conceptualise human development as increasing the options available to the human being, such as equal opportunities, sustainability, and empowerment (PNUD, 1995), which broadens the vision of development and orients it towards the capacities of individuals (Griffin, 2001). Human development is the development of society

through creating human capacities based on participation, which is both the process and the result thereof (PNUD, 2016).

Amartya Sen (2018) provides a non-linear vision of development focusing on the way people live their lives. Instead of taking into account solely the functioning of institutions, the concept is based on being open to plurality, the importance of the imperfect, and above all on the idea that what matters is not the result but the process followed to achieve it. While there are also other perspectives of human development, the work of Amartya Sen has provided the conceptual foundation for an alternative, broader approach to analysing the operation of governments and the responsibility of various institutions in terms of offering opportunities to people and guaranteeing them freedom to develop their capabilities (Bedoya Abella, 2010).

Sen (2000a, p. 89) conceives of development as “the expansion of the population’s capacity to carry out freely chosen and valued activities”, which shifts focus from the end to the means used to achieve it as a factor having an important role in the process.

Given this complexity, the concept of human development has been proposed to be used in the study of large data sets, a situation that has generated scepticism in the scientific world. However, it was not a limitation for Mahbub Ul Haq, who put forward an alternative vision that was both practical and inclusive. In his formulation, the Human Development Index (HDI) was conceived of as consisting of three basic dimensions (longevity, knowledge, and decent standards of living) (PNUD, 1990). These elements have been refined in order to disaggregate data and render a more comprehensive measurement (PNUD, 2018) (Fig. 3).

In this sense, human development is a complex process in constant flux which, in response to various challenges, has led to identifying a number of spheres which need to be taken into account in its configuration process (Fig. 4).

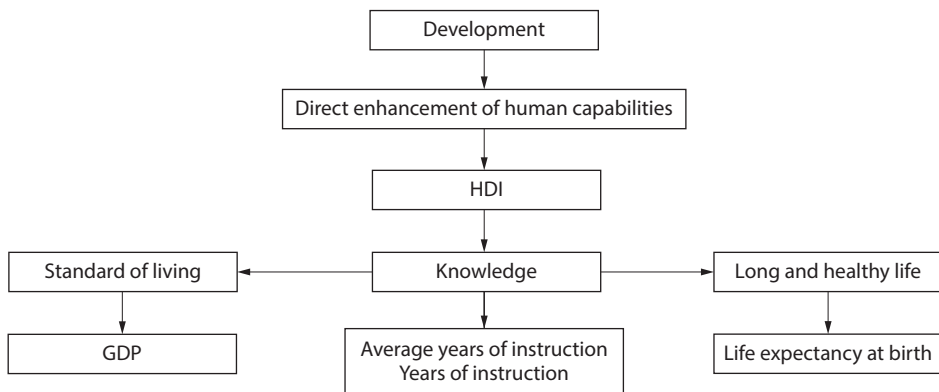


Figure 3. Human Development Index

Source: Own elaboration based on PNUD, 2015, 2016

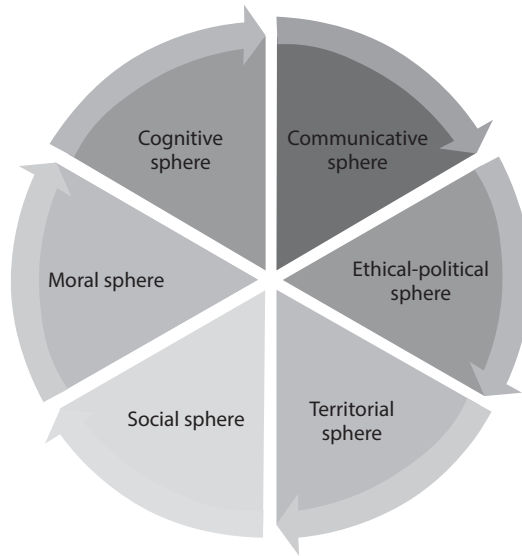


Figure 4. Domains of Human Development

Source: Own elaboration based on Delgado, 2006; García-Lirios, 2019

Although all these spheres are interrelated in the process of achieving human development, the territorial aspect stands out due to its relevance as a determining factor of the capabilities and opportunities available to individuals. However, it should be clarified that the concept of territory comes from the root of the word, *terra*, which refers to land, and the suffix *thorium*, which means the place where the action occurs or where the instrument used for the action is located. In this sense, territory is understood, from the etymological point of view, as a meeting of material reality and an action, of the object of interest and the interested subject, that is, an appropriated space (Monnet, 2014).

The connection of territory and human development analysed in terms of the territorial dimension has allowed its analysis at different scales. In addition, as a result of the change in the conceptualisation of the urban area as a production scenario, different proposals have been generated, such as the right to the city, the redistribution of resources, and the importance of human capacities (García-Lirios, 2019). However, for the purposes of this paper, the notion of territory has been deemed fundamental to the analysis of human development on a metropolitan scale.

5. Territorial foundation

Territory as a concept refers to the elements present in reality, comprising empirically perceivable elements contained in an object of study in order to facilitate the generation of new knowledge (Llanos, 2010). It is a social product,

which is to say that it results from the work engaged in by a society to achieve its objectives and therefore is part of the economic system, an inseparable, supportive, and contradictory set of increasingly artificial systems of object and action. It is neither chaos nor a collection because its essence lies in interaction, complexity, and change. Space is historically built (Rodríguez-Valbuena, 2010).

The term 'territory' began to be commonly used during the eighteenth century, although its understanding has varied. However, it is commonly understood as the physical delimitation of a space and as the space in which an action takes place (Aceves González, 1997).

It is a polysemic concept. As Gottmann (1961) points out, for politicians it means population and resources; for the military, it corresponds to the topographical characteristics which inform tactical, strategic, and distance-related conditions; for a jurist, it is jurisdiction and delimitation; for a geographer, it is space comprising a certain location.

It is recognised that the term 'territory' can be conceptualised from the perspective of different disciplines (biological, social, geographical, etc.) and may be considered multireferential, which is why it is essential to define its meaning relevant for the present study. Here, it is understood as the etymological meeting of matter and action, of the object of interest and the interested subject, that is, an appropriated space (Monnet, 2014).

For its part, territorialising is understood as an approach which insists on human action based on a certain value system to produce a territory (Monnet, 2014). Territorialising a space implies changes in mobility and a possible clash with other species (Herrera Montero, Herrera Montero, 2020). In other words, territory can no longer be conceived of as a container of space or an administrative divider established by urban and regional planning but needs to be seen as the superposition of territorial scales and dimensions to be considered in the same space (Beuf, 2017).

The convergence of countless elements in the social life of a given territory generates multiple research problems, and each of them may be studied from multiple perspectives and disciplines. Therefore, it is not enough to select a research problem and make occasional references to the concept of territory. The notion should rather be integrated into the study of social systems and relationships and understood as part of everything which is the subject of intervention on the part of human beings (Llanos, 2010).

Linking human development with territory represents a challenge, not only in matters of scale, but also in the recognition of converging functional relationships. Within a single country, it has been approached on different scales (national, state, municipal, and metropolitan) (PNUD, 2019), understood not only as population groups but also as a connecting element between common features, cultural identity, and social participation networks. Under this concept, the distinctions between the rural, the urban, or the metropolitan, as well as the institutional political relationships, would be more important for the definition of human development (PNUD, 2004).

6. Metropolitan areas

The complexity and leading role that cities have acquired in the modern world are tangible and inevitable facts. Urban centres incessantly mutate and transform (Martín Ramos, 2004). In the case of Mexico, the challenges the country faces in terms of urban development are related to worldwide changes associated with the globalisation process, generating new trends in population distribution and the expansion of cities. This has caused a large number of Mexican cities to spill over the boundaries of the original municipality or to establish conurbations and close socioeconomic relations without necessarily having urban continuity. The common denominator for all these phenomena is the metropolitan area, understood as an extensive terrain which encompasses two or more administrative political centres (CONAPO, INEGI, SEDESOL, 2004).

Metropolitan areas, due to their relevance, offer a large number of opportunities but also generate many problems associated with such issues as concentration of the population, the provision of services, specialisation, and diversification (CONAPO, INEGI, SEDESOL, 2012). Data indicate a positive correlation between the size of the metropolitan area and the income it provides, in addition to a greater availability of human and physical capital, making metropolitan planning, coordination, and administration key instruments in influencing the pattern of spatial organisation.

According to data from CONAPO, SEDATU, and INEGI (2015), the number of metropolitan areas in Mexico increased from 59 in 2010 to 74 in 2015. Likewise, their population went up from 63.8 million to 75.1 million, which represents 56.8% and 62.8% of the national population, respectively (Table 3).

Table 3. Population and metropolitan areas in Mexico

Range	Number of metropolitan areas	Population in 2015	%	Annual growth rate (%)	
				2000–2010	2010–2015
National total		119,530,753	100	1.4	1.3
Metropolitan zone total	74	75,082,458	62.82	1.6	1.4
5,000,000 or more	1	20,892,724	17.48	0.9	0.8
1,000,000 to 4,999,999	12	25,734,673	21.53	2.0	1.8
500,000 to 999,999	23	17,892,903	14.97	2.0	1.7
Less than 500,000	38	10,562,158	8.84	1.7	1.5
Rest of the country		44,433,460	37.17	1.0	1.1

Source: Own elaboration based on SEDATU et al., 2018, p. 56

7. Conclusions

The analysis of the feasibility of linking territory and human development shows that there are still few approaches which take this relationship into consideration in the current research on demographic and urban growth, as what prevails are visions centred on economic growth and data generation. In this light, it is particularly interesting to analyse the connection between metropolitan areas and the HDI, showing that it is not a static relationship, but a complex, diverse, and dynamic one.

The need to broaden the understanding of the principles of human development and go beyond its global and specific conceptions is highlighted by research which discusses them in terms of structural axes and reflects on the concept of territory and human development. In this sense, the establishment of these new visions allows us to analyse territorial processes and the individual as two integral parts of one issue, with the theory of human development forming the basis for such considerations.

Statistical analysis confirms the profound dynamism and territorial complexity present in Mexico. By using territory as the foundation for researching human development, we can observe significant territorial differences, and the introduction of this factor to the discussion translates into flexibility when analysing territorial dynamics on different scales.

Specifically, the territory-based approach demonstrates that the degree of human development in Mexico varies and should be considered individually according to the context. Human development cannot be measured by compiling quantitative results, but by studying the particular factors influencing the quality of life of people living in a territorial unit – in the case of this text, in a metropolitan area. Such territorial units have a complex nature due to their governance status and lack of coordination. However, the way in which they function represents a challenge for the people who need to navigate them daily, and that is how the degree of human development in a given region is measured.

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ABSTRACT

Towards the construction of a territorial human development index. An approach from the metropolitan perspective

“The true wealth of a nation is in its people” – this notion has evolved in history according to national demands and has been oriented towards empowering the population in carrying out the activities of their choice. To measure this idea, the Human Development Index (HDI) has been used as a tool of quantifying the degree to which human beings enjoy their lives, focusing on three essential elements: longevity, knowledge, and decent standards of living. Adjustments have been made to its methodology, such as putting emphasis on strategic elements and adapting it to various territorial scales. However, the development index has mostly been approached as a simple average of the available data, leaving aside the true concept of territory and territoriality, which should be the basis for the analysis of a topic as relevant as human development. Therefore, this paper proposes to analyse the human development index from a territorial perspective, discussing its importance on the example of the metropolitan areas of Mexico.

Keywords: human development, metropolis, territory, human development index, factoring

The authors of this monograph delve into an analysis of the impacts and consequences of diverse crises on cities, exploring the responses and adaptive mechanisms crucial for navigating challenges and fostering development, even in crisis conditions. The publication specifically addresses such issues as the spatial ramifications of the COVID-19 pandemic (e.g. effects on urban spatial policies, the informational layer of cities, resident behaviour, and the informal labour market), cities' strategies in addressing the climate crisis (e.g. urban agriculture, the creation of green urban spaces), contemporary concepts of city development aimed at enhancing the quality of life (e.g. functional mix, walkable city, New Urbanism), and crises from a regional perspective (e.g. flood threats). The authors present diverse viewpoints and employ various research methods, exploring cities in Europe and the Americas to highlight both differences and universal challenges.

This monograph is the culmination of extensive collaboration among scholars from the University of Warsaw and universities in Latin America, including Universidad Autónoma del Estado de México, Universidad Mexiquense del Bicentenario, Universidad Autónoma de Nuevo León in Mexico, and Universidad de los Llanos in Colombia. Some articles were co-authored by teams comprising researchers from both Poland and Latin America.

The monograph introduces an innovative perspective on urban issues within the context of Polish geographical literature, focusing on both Polish and Latin American cities. A notable strength lies in the methodological aspect [and] the balanced proportion between a thorough analysis of the examined problems and the presentation of practical solutions. The monograph is poised to capture the interest of a diverse readership, including geographers, researchers from various disciplines in social sciences and related fields, doctoral students, as well as individuals intrigued by contemporary urban development issues.

from the review by Wioletta Kalamucka

Many studies [featured in this monograph] stand out for their exploration and testing of unique methodological proposals, encompassing variables, indicators, and data. The evolutionary approach taken towards the examined issues is particularly intriguing. Numerous phenomena studied within urban issues are intricately linked to their current developmental paths. Altering these paths necessitates robust external stimuli, such as the introduction of tourism into traditional agricultural or rural communities. However, this is not always beneficial for the traditional life of local communities, despite stimulating economic development. This could potentially be a valuable avenue for future research initiatives.

from the review by Andrzej Matczak

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