



SOCIAL EQUITY TOOLKIT INCLUSIVE GROWTH THROUGH EQUITABLE PLANNING

Second Edition: Global Cities

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ARUP

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Introduction

Recent decades have seen an unprecedented gravitation towards cities. Today, more than half the global population lives in cities, a share that climbs higher each day. All over the world, cities are attempting to accommodate this influx of new residents and commuters. From new transport networks to large-scale neighbourhood revitalisation projects, cities on every continent are remaking themselves to absorb growing populations and become more attractive to newcomers.

However, while these changes offer numerous enticements for urban living, they can create significant vulnerabilities for existing city residents. Rising quality of life and gentrification often lead to rising cost of living as well, largely leaving newly desirable neighbourhoods accessible only to those with the means to pay for them. Long-standing communities, particularly those who are low-income or otherwise underrepresented in decision-making processes, may be unable to afford to remain living in their homes and are displaced to less costly and, in some cases, more isolated locales.

Displacement can take two forms:

- **Physical displacement:** Existing buildings (and therefore residents) are removed to make way for new developments.
- **Economic displacement:** Existing residents in a community are “priced out” of an area due to rising rent or amenity prices. The effect of economic displacement tends to be much greater, although the true scale is unknown.

The harmful impacts of displacement can be extensive. When people are forced to leave their homes and communities, they often end up relocating to more peripheral locations, making access to jobs and services more challenging and expensive. Further, widespread displacement can lead to the breakdown of established cultural cohesion and social networks, producing psychological and emotional effects. And in some cases, displacement can result in homelessness or unlawful squatting.

Development resulting in displacement has become a new normal in 21st century cities. However, recognising the risks this progression poses to communities—as well as the value of maintaining security of tenure, established local culture and character, and a diversified local labour force—cities have begun turning their attention towards stemming the tide of displacement.

The challenge is therefore to capture the wider value arising from new urban developments and the natural evolution of cities, while at the same time implementing measures which seek to reduce the negative and unintended consequences of such development. With the goal of enabling the growth and change of cities while distributing accompanying benefits more equitably across new and existing populations, city governments across the world have

implemented various policy, planning and design measures to protect and preserve communities in the face of neighbourhood change. This document provides an overview of global best practice in service of development without displacement.



Source: Marcel Lam Photography

Social Equity Toolkit background

In June 2018, urban planners at Arup released the first edition of the *Social Equity Toolkit* (SET), a US-based policy toolkit designed to provide American city officials, transport authorities and community groups with a road map towards equitable development. The SET maps best-practice measures onto a series of timelines that align to key milestones in the transport development process. This temporal format provides practical guidance regarding when to implement each policy intervention to maximise impact.

But development-induced displacement is not limited to the United States. Cities across the globe struggle to grow and change while still maintaining affordable housing and lifestyles. This challenge can be particularly pronounced within the context of the development of new transport systems and the mixed-use districts that spring up around transport nodes (referred to as transport-oriented development, or TOD).

This document broadens the scope of the initial SET to encompass cities on four additional continents. Applying the timeline-based format from the initial SET, this Global Cities edition compiles best-practice policies that respond to local contexts. Specifically, this report is divided into four chapters:

1. England
2. South Africa and African Cities
3. Australia
4. Hong Kong

With divergent histories, current conditions and local policy frameworks, each of these countries and cities seeks to achieve development without displacement in different ways. For example, in England, a focus on “good growth” for the country’s cities and burgeoning metropolitan regions, alongside a “localism” agenda, has led to intensive efforts towards community-driven planning processes. Meanwhile, South Africa, seeking to redress historic spatial injustices wrought by apartheid, is attempting to racially

and socioeconomically integrate central urban neighbourhoods through inclusionary zoning and government-backed loans. With growing competition for space and housing prices climbing rapidly in major cities, Australia is seeking to release vast portions of its heavily regulated crown land in the vicinity of metropolitan areas to accelerate housing production. And while the Hong Kong government offers limited policy-based protections against displacement, it seeks to leverage its innovative Rail + Property TOD model to build affordable housing in buildings owned by MTR, its public transport authority.

In spite of the differing contexts in which they are implemented, these policies can offer valuable lessons for cities in other countries that are struggling with equitable development policies. This document intends to help illuminate the range of measures cities can implement in developing their own Social Equity Toolkits.



Source: Robert Bye

Implementation timelines

The purpose of this document is to address the challenge of displacement induced by new urban developments, with a focus on transport and TOD. Figure 1 illustrates this relationship, showing how some high-level milestones in the TOD process cause land values to rise and, ultimately, can lead to unaffordable communities, displacement of residents and businesses, and a wholesale change of a neighbourhood's established culture and character. Each chapter in this document contains a geographically specific Social Equity Toolkit that catalogues existing policy measures that, when implemented at the right time in the TOD process, can stem the tide of displacement and cultural change even if land values rise (Figure 2).

Each chapter in this report follows a parallel structure. First, each chapter begins with a description of the specific historical and policy contexts, emphasising affordable housing pressures and the changing nature of cities. Next, each presents a Social Equity Toolkit along with its own unique transport and TOD timeline, with policies aligned to the most impactful stage for implementation. Finally, each chapter details specific policy measures, providing descriptions and case studies.

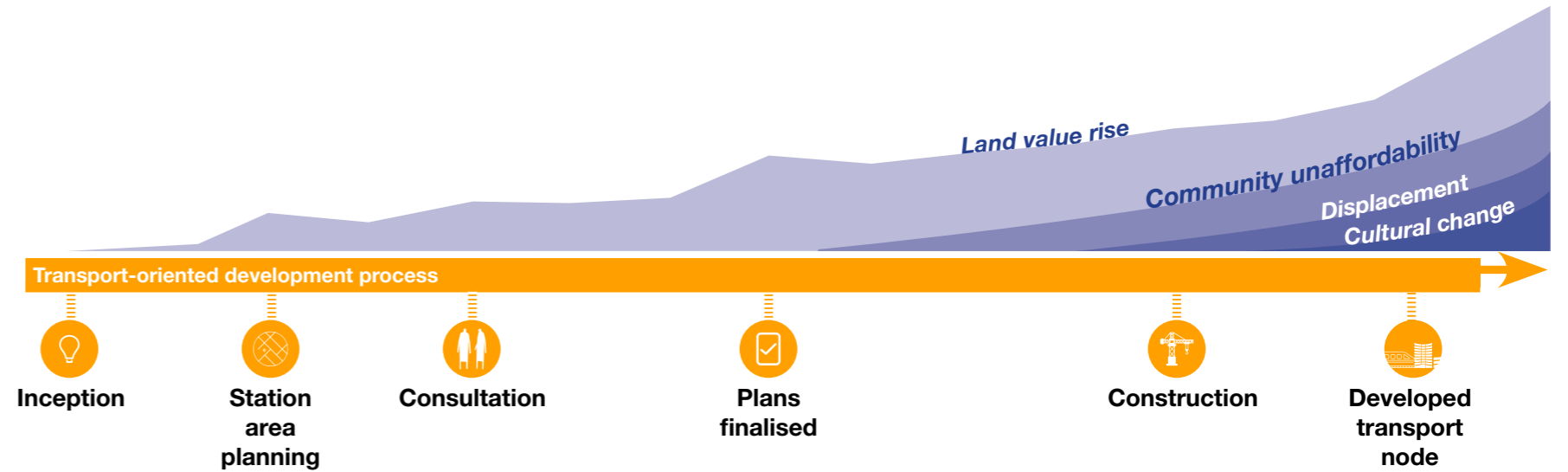


Figure 1: Timeline of TOD and its potentially negative impacts

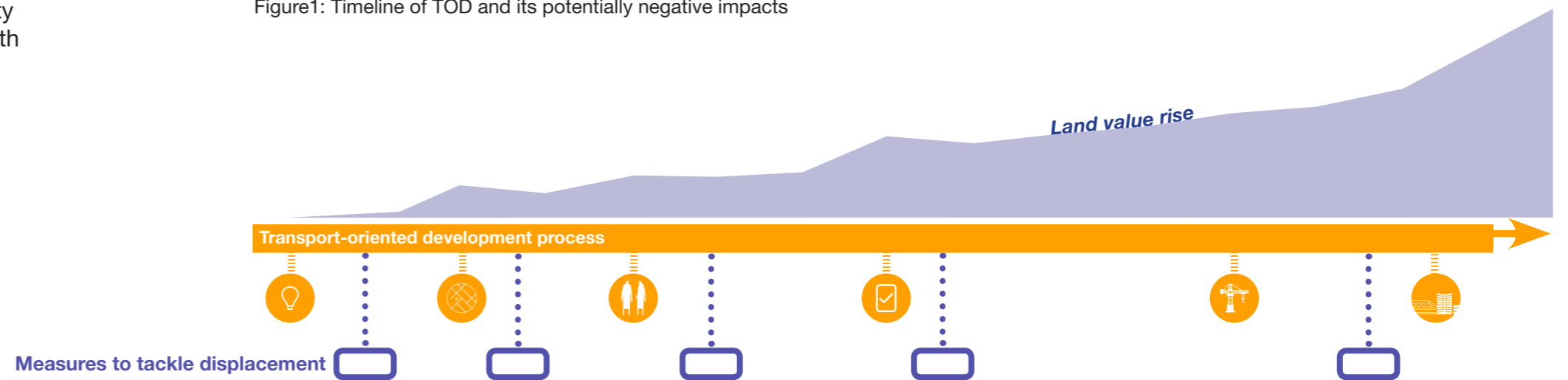


Figure 2: Timeline of TOD and measures to control potential negative impacts



1: ENGLAND

England in context

England's housing crisis is well documented, with demand outstripping supply in many parts of the country and housing becoming increasingly unaffordable.

Consistent with the principles of “good growth”, government, practitioners and developers are seeking to capitalise on the TOD potential that transport hubs can bring. Specifically, the English government is working to harness the potential for transport projects to deliver higher-density development with good access to local services and employment opportunities. Similarly, transport schemes are being promoted where they can be shown to unlock growth in terms of jobs and housing. Such examples include the Crossrail (the Elizabeth Line) in Greater London and Northern Powerhouse Rail in the North of England.

However, similar to its impacts in other countries around the world, TOD in England often leads to increases in surrounding land and property values. While recognising that change and evolution of the built environment is an ongoing and continuous process, and not seeking to limit this, this research contends that urban growth need not come at the expense of existing communities. Through understanding the interrelationships between transport, housing, social change and displacement, English policymakers, transport sponsors and developers are becoming more equipped to address the drivers of these complex processes before displacement occurs. This chapter details some of the most effective policy interventions currently in use in England.

At the national, city and local levels across England, there is an increased focus on the importance of achieving good growth. The precise definitions vary, but most are centred on delivering inclusive and affordable homes, working in partnership with citizens and businesses, ensuring communities are well-connected to the labour market, and promoting the economic sustainability and vibrancy of places. The provision of high-quality transport systems is an important component, enabling local communities to collectively benefit from growth.

This chapter identifies best-practice tools available in the English context that can be used to maximise the benefits of development for all, thereby minimising displacement of existing communities.

The tools presented have several aims but generally they seek to influence or bring about one or more of the following outcomes: protecting housing affordability, increasing the supply of affordable homes, protecting and creating key community facilities, and working with people to ensure their voices are heard in the development process. These tools can be used individually or collectively as a package of measures to help realise inclusive growth.



Source: Ron Porter

English Social Equity Toolkit



Social Value Act

Applicable to the public sector, requires authorities to consider how services might improve an affected area's economic, social and environmental wellbeing



The Green Book

Guidance published by Her Majesty's Treasury to help policymakers, public transport sponsors, private developers and transport investors determine whether their programme, policy or project will achieve policy objectives and offer value to the government



Community land trusts

Not-for-profit, community-based organisations that aim to further the social, economic and environmental needs of a community by acquiring and managing land as a way to provide genuinely affordable housing, as well as other key community assets



Estate regeneration ballots

London policy requiring that estate regeneration plans that either involve the demolition of social housing or require funding from the Greater London Authority undertake a ballot with residents on the development proposals



Local plans and neighbourhood plans

Set out priorities for the development and land use in a specific local authority or neighbourhood area



Planning obligations

Enable local authorities to require developers to deliver public goods in the form of financial contributions, specific infrastructure improvements or a minimum number of affordable homes, among others.

Social Equity Toolkit timeline



Social Value Act



What is the Social Value Act?

The Public Services (Social Value) Act 2012 (SVA) applies to the public sector when procuring services such as housing, healthcare, transport and waste. The SVA requires authorities to consider how the service to be procured—for example, outsourcing social housing maintenance contracts—might improve the economic, social and environmental wellbeing of the area. These benefits could come in the form of job and skills training, opportunities for small and medium enterprises and environmental protection or enhancement strategies.

In November 2018, the government announced that the act will be strengthened to mandate—rather than simply “consider”, as it currently requires—commissioners to implement social value in procurement processes. An update to current legislation is anticipated by summer 2019.

When should the Social Value Act be implemented?

The SVA can be implemented at all stages of the procurement process: consultation, service design, tendering and post-procurement. Requirements to measure specific social value criteria can be included in contracts during the tender process.

What works well?

- Social value benefits considered from the outset through the procurement or management of a service
- Benefits, such as improving skills and providing opportunities to small and medium enterprises, directly targeting local residents and businesses

What are the unintended consequences?

- Only asks for consideration of social value, rather than implementation, leading to different standards of practice
- Limited awareness of the SVA, which means it might be overlooked as a potential tool

What are the challenges?

Only applies to the procurement of services, not goods and products

Limited processes to measure social value (if measured at all)

Common Social Impact Framework for Rail Rail Safety and Standards Board, England

The SVA was a key driver for the Rail Safety and Standards Board to develop a common framework for the rail industry to measure and understand its social impact value as a system across rail industry organisations, projects and programmes. Established in 2018, and prepared by Arup’s Social Value team, the Common Social Impact Framework informs the rail organisations’ social assessment tools and supports the setting of appropriate metrics and goals to measure performance. This covers a range of categories including social inclusion and regeneration. The Common Social Impact Framework for Rail is currently being applied to live projects including the social impacts of the London Waterloo Station upgrade.



Community land trusts



What are community land trusts?

Community land trusts (CLTs) are not-for-profit, community-based organisations. They aim to further the social, economic and environmental needs of a community by acquiring and managing land as a way to provide genuinely affordable housing, as well as other key community assets. They are made up of members who currently or will in the future live or work in the area.

CLTs come in many different forms, but the process they follow is similar. First, a CLT either purchases land or receives it from the owner in the form of a gift. The CLT will then build housing and other community facilities (schools, parks etc.) on the land, either by itself or through procuring a third party. The CLT retains ownership of the land, allowing them to sell or let housing at an affordable price. Rent levels and sale prices are typically below market level, often based on local wages, rather than land value, meaning that home ownership becomes, and remains, much more affordable than market forces would typically allow. The CLT will then manage the properties to ensure that they continue to benefit the community, are of a high standard and remain affordable. Any rental or sales profits are re-invested into projects or programmes for community benefit.

When should community land trusts be implemented?

CLTs must be implemented very early in the development process. Early foresight means that the land can be purchased prior to any substantial land value increases. Alternatively, land can be gifted to a CLT as part of a planning agreement.

What works well?

- Secures tenancy in areas where land value has increased
- Helps low-income individuals and families to rent or buy homes in their local area where they may not otherwise be able to
- Enables and encourages active and direct community participation

What are the unintended consequences?

- Difficult for CLT residents and businesses to move to other market-rate locations

What are the challenges?

Time- and resource-intensive to establish the trust and develop the land

Professional support often needed, which can be costly

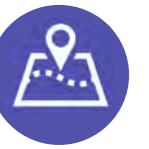
Difficult to implement CLTs across larger geographies

Leeds Community Homes South Bank, Leeds

There are nearly 290 CLTs in England and Wales. One example is Leeds Community Homes (LCH), who is acquiring 16 permanently affordable homes in the heart of the South Bank Leeds regeneration zone, where a new High Speed Two rail station is proposed. In October 2016, LCH launched a community share offer, reaching their £360,000 target in January 2018. Community shares are a way for neighbours to pool their money to fund initiatives which will serve a community purpose. In this case, there is an understanding that those who have bought community shares can expect a 2% return per annum, from 2020. This money was used to purchase the 16 homes from the developer of the wider Climate Innovation District at a 60% discount on market value. This arrangement with the developer was brought about through a planning obligation. Of the 16 homes, LCH intend that once delivered, nine homes will be rented at “social rent” levels, with the other seven sold at two thirds market value (though LCH retain ownership of the land). The LCH will continue to manage the sixteen homes, ensuring that they remain genuinely affordable.



Local plans and neighbourhood plans



What are local plans and neighbourhood plans?

Local plans are statutory documents prepared by local planning authorities. They comprise statutory development plans, which set out priorities for the development and use of land in a specific local authority area. Planning applications for development must conform with the local plan, unless material considerations indicate otherwise.

Neighbourhood plans also set out future priorities for the local area. They are typically written by, or on behalf of, local residents and only become a statutory document once approved, by referenda, by those that live within the boundaries of the plan. In areas which are predominantly commercial in nature, they can also be developed by local businesses.

When should these plans be implemented?

Local planning authorities have a statutory duty to prepare a local plan and are required to regularly review it to ensure it remains up-to-date. Ideally, a local plan would be in place before significant development proposals are brought forward. The same applies for a neighbourhood plan. This enables the two plans to inform development proposals.

What works well?

- Allows a local authority and/or a local community to develop policies which support good growth, particularly around affordable housing
- Gives the community a greater say in the form, scale and nature of development in their local area

What are the unintended consequences?

- Though local plans typically include policies regarding provision of affordable housing, the precise amount of affordable housing provided is subject to viability assessment, which can result in reduced levels of provision

What are the challenges?

Cycle for preparing local plans not usually linked to specific transport proposals

May not reflect the changing local transport context

Drafting neighbourhood plans is time-consuming for small organisations

Neighbourhood Plan Development Morpeth, Northumberland

Residents were keen to enhance the attractiveness of Morpeth as an employment location to prevent it becoming a commuter town. The community decided that creating their own neighbourhood plan was the best way to ensure that the right type of development was taking place. Their vision is for employment-focused development, which considers the community's needs and desire for growth, while recognising local identity and distinctiveness. The residents of the town were also keen to ensure that affordability was a significant consideration. The neighbourhood plan requires housing developments resulting in a net gain of 10 or more dwellings to provide affordable housing. It also compels developers to make appropriate provision for infrastructure to serve new housing developments.



Source: Simon Cotterill

The Green Book



What is the Green Book?

The Green Book is a guide published by Her Majesty's Treasury which is used to appraise and evaluate public investments. The guidance is used by policymakers, public transport sponsors, private developers and transport investors to determine if their programme, policy or project will achieve policy objectives and offer value to the public purse. The Green Book recommends various methods to assess value to public funds. For instance, the Social Cost Benefit Analysis takes into account quantifiable, direct costs and benefits to the public as well as the indirect, and sometimes non-monetary and non-quantifiable, advantages or disadvantages of an investment.

Increasingly, transport sponsors are recognising that, by using the tools and guidance included in the Green Book, wider economic benefits can be captured to boost the value of an investment. Potential negative knock-on effects of a development can also be identified earlier on, making design modifications and other mitigation efforts easier.

When is the Green Book used?

All strategic transport investments must adhere to Green Book guidance. Therefore, wider economic and non-monetary benefits are always considered at an early stage in the development process.

What works well?

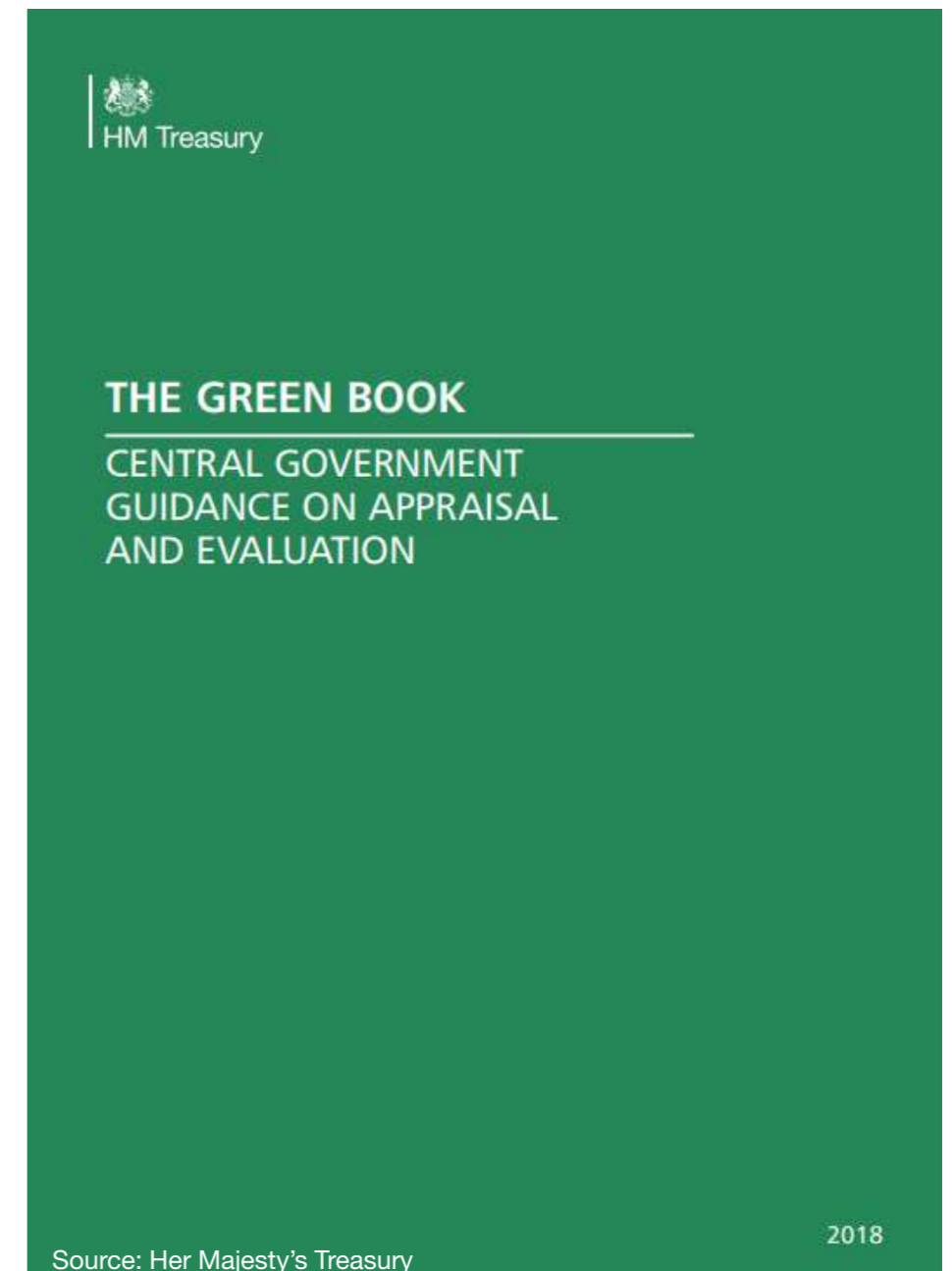
- Green Book appraisal is a statutory requirement for publicly funded schemes, making it easier to compare value for money across different schemes
- Guidance is regularly updated to ensure it includes the latest thinking in terms of economic, environmental and social appraisal

What are the unintended consequences?

- Rigid framework limits flexibility when evaluating complex, unusual or novel schemes, potentially limiting effectiveness for new and untested measures to tackle displacement
- More difficult to place value on non-monetary benefits or costs of investments, meaning they may be lower priorities than more tangible economic and financial benefits and costs
- Non-monetary benefits of a project can be lost in the Green Book methodology, which is more focused on concrete and quantifiable outcomes and may not end up in the final design

What are the challenges?

Resource-intensive	Difficult to quantify non-monetary benefits so may be understated or not included
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Estate regeneration ballots



What are estate regeneration ballots?

The Mayor of London introduced estate regeneration ballots in July 2018. The policy requires that estate regeneration plans that either involve either the demolition of social housing or require funding from the Greater London Authority (GLA) undertake a ballot with residents on the development proposals. If residents vote in favour of the plans, then the developer or landlord can proceed with the planned regeneration. If residents vote against, then the developer or landlord will not receive GLA funding for the project.

When can estate regeneration ballots be implemented?

It is a requirement that estate regeneration ballots happen before regeneration takes place. However, to proceed with the ballot, there must be a design for the residents to ballot on. Therefore, the ballot must take place after the design stage.

What works well?

- Can protect existing residents from displacement where landlords are regenerating to accommodate new residents
- Give residents a greater say in decisions regarding their estate
- Encourage landlords and developers to consider the opinions of and effects on residents when considering regeneration

What are the unintended consequences?

- Potential for ballots to be divisive among residents, potentially delaying or halting the regeneration process and reducing community cohesion
- Measure is new and has not been tested, so unintended consequences are not yet fully understood

What are the challenges?

Projects the residents do not approve may still proceed, albeit without GLA funding

Does not apply to developments which are not seeking GLA funding

Kingston Council Estate Regeneration Ballot Cambridge Road Estate, London

One major landlord to hold a ballot will be the Royal Borough of Kingston upon Thames, who wish to regenerate the Cambridge Road Estate, the largest estate in their borough, with the help of GLA funding. Regeneration will result in an increase of almost 1,200 new homes (from 820 to 2,000). However, prior to regeneration taking place, the Council will hold the ballot to ensure resident approval of the scheme.

Prior to the ballot taking place, The Royal Borough of Kingston upon Thames held a “bidders’ day” for residents so that they could comment on the three different bidders’ proposals. Following this, a bidder was selected, with plans to finalise contracts by March 2019. The ballot was an opportunity for residents to express their views on the regeneration of the estate, which is expected to take place in autumn 2019.



Source: Local Authority Building & Maintenance

Planning obligations



What are planning obligations?

Planning obligations are legal obligations to mitigate the impacts of a development proposal and make acceptable development which would otherwise be unacceptable in planning terms. They might be used to prescribe the nature of a development, to secure a contribution from a developer to compensate for loss or damage created by a development, or to mitigate a development's impact.

Specifically, Section 106 agreements can be used to prescribe the nature of a development or to secure a contribution from a developer to compensate for its impacts. They are typically used by councils to secure affordable housing requirements.

When should planning obligations be implemented?

Planning obligations are agreed as part of the grant of planning permission, which usually occurs towards the end of the design process, prior to construction.

What works well?

- Flexible for adaptation to local context, allowing decision-makers to address planning priorities
- Collection and spending of Section 106 monies listed publicly, ensuring greater transparency between the local authority and the public
- Provide a mechanism to levy land value uplift generated through market-led development to secure the on-site delivery or off-site financing of public goods
- Can secure the delivery of a mixed-tenure and mixed-income community through affordable housing requirements

What are the unintended consequences?

- Sometimes viewed by the public as a way for developers to “buy” planning permission
- Extensive negotiations on Section 106 agreements, which can prolong the period for securing planning permission

What are the challenges?

Subject to viability assessment and therefore can be negotiated away

Community and developer stigma towards affordable housing

Pocket Living Bollo Lane, Ealing, London

Pocket Living is a private developer who works with local planning authorities to achieve good outcomes for all parties when developing homes in London. For example, in Ealing, West London, Pocket Living is building 112 residential units, 75% of which are classified as affordable, which is due for completion in mid-2019. It is a policy of Pocket Living to commit to at least 70% affordable homes on all their projects. In addition to this provision, a clause in the Section 106 planning agreement states that starter homes would be offered at a discount of at least 20% to first-time buyers who already live or work in Ealing and earn less than £71,000 per annum. This aims to ensure that while prices in the Borough rise, existing residents can remain in the area.



Source: Pocket Living

2: SOUTH AFRICA AND AFRICAN CITIES

Africa in context

Cities across Africa are growing at unprecedented rates. According to the World Economic Forum, each day approximately 2,000 people make their way from rural areas to seek opportunity in Africa's burgeoning cities. This exodus, coupled with regional migration and natural population growth, has exacerbated Africa's housing needs to crisis proportions. The rate of housing provision simply cannot keep up with new demand for accessible and affordable housing.

Many newcomers are forced to settle in informal settlements or in neglected inner-city buildings, where informal slumlords convert unused office space and apartments through illegal subdivision to accommodate far more people than the buildings are designed to accommodate. While such conditions are inadequate and in many cases unsafe, this informal response to housing provision has at least provided new city dwellers with an opportunity to live in well-connected and accessible locations as they seek new livelihoods in growing and gritty cities.

City authorities and local governments have also had to respond to the need for housing, with low-cost housing consistently being a top issue in politics and legislation. For example, since the fall of apartheid in 1994, South Africa has embarked on one of the largest housing provision programmes globally, which promises free housing to the poor and unemployed. Since its inception more than 20 years ago, South Africa's mass housing programme has shifted focus from housing provision to housing facilitation, with the range of subsidy and partnership programmes becoming more sophisticated and characterized by increasing delivery options. While the programme began as a singular approach that provided fully built housing units along with land ownership to low- or zero-income families, it has broadened its scope to include rental housing, community partnerships and obligations being placed on the private sector to be a co-provider of housing opportunities. These responses have largely been driven by the inability of government to continue funding the programme of free housing in the face of economic downturns and frustration of a housing backlog that seems insurmountable.



The challenge

The early push for mass housing provision in African cities, and especially in South Africa, was carried out with little alignment to transport provision programmes. The urgency to provide housing to the urban poor has meant that both government and private developers have favoured cheaper land in the periphery of cities instead of aligning housing provision with supportive transport. As a result, low-income households spend up to 40% of their total household incomes on daily commutes. These decisions—along with already sprawling cities, and in the case of South Africa, apartheid policies of segregation that created enduring inequality—have made recent plans to implement mass transport programmes more complex and expensive.

Thus, many poor people are already located further away from opportunity. For the last two decades, city authorities, while officially disapproving of illegal and informal occupation, have turned a blind eye to these housing solutions, acknowledging the inadequacy of formal provision to cater for all housing needs.

However recent trends and a renewed energy in regenerating inner cities and neglected downtowns have placed the urban poor in positions of increasing uncertainty. As inner-city office buildings and opulent old apartment blocks are renovated into trendy lofts, studios and coffee shops for a new generation of young professionals, the urban poor are again being pushed out to the city periphery, where the difficulties of accessing jobs and education lock many families in generational cycles of poverty.

At the same time, many African cities are implementing new mass transport programmes, with bus rapid transport being a popular choice. Inner cities are the favoured focus for initial phases, as they are dense enough to support such systems, and they promote economic sustainability.

While these programmes are critical and long overdue in providing reliable and affordable city connectivity, their flip side is virtually inevitable increases in inner-city rents and property values. African cities and city authorities are beginning to acknowledge these unintended consequences but are still a long way from developing a coherent response and appropriate range of tools to deal with these effects in a manner that protects the right to the city for all.

Communities themselves are fighting back, with illegal occupation of prime land becoming a growing feature in cities, numerous high-profile court cases fighting evictions and the sale of public lands and the growing call from the political left for the amendment of South Africa's constitution to allow for the redistribution of land from the rich to the poor without compensation. This call in particular has been met with stiff opposition in some quarters and sparked a renewed debate about questions of property rights as a marker of economic emancipation and transformation across South African society.

This chapter presents some of the existing tools in African cities to prevent displacement and highlight their efficacy and shortcomings through real-world case studies, with a focus on South African cities.

Responding to the challenge in the African context

The Social Equity Toolkit in an African context focuses on the available tools and processes to prevent residential displacement. There are very few tools, if any, at present that address the displacement of commercial and not-for-profit enterprises, even

though small and community-owned businesses face the same challenges from gentrification and unaffordability as the residents of the communities they serve.

The African Toolkit is also framed by the acknowledgement that mass transport is far less developed compared to cities on other continents, with most cities still in the planning phase of public transport initiatives.

This means that a richness of tools to tackle displacement has not yet emerged and that successfully implemented case studies are few and far between. Thus, the examples provided are mainly in the planning stages, and a full analysis and evaluation of their impacts and effects is not possible at this time.

Nevertheless, the African toolkit and accompanying case studies highlight the unique opportunity to assess how well cities and authorities have drawn on global lessons and outcomes, with a view to both pre-empt the challenges of transport development and displacement, but also to exploit the opportunities that transport provision presents to restructure Africa's sprawling and unequal cities.



The winter of 2017 saw the Cape Town neighbourhood Bo-Kaap erupt in street protests reminiscent of the apartheid era, with residents airing their frustrations with the City, whose sales of publicly owned land within their district continues to push costs up in one of the few remaining areas where lower-income communities still live on the doorstep of the city centre.

African Social Equity Toolkit



People's Housing Process

South Africa's Department of Human Settlements introduced the People's Housing Process as a means for low-income communities to self-organise to exercise a degree of control over the type of housing provided to them and reduce timelines of provision. Communities, often assisted by not-for-profit organisations, instigate a plan for housing provision on public land, with the state contributing land costs and applicable subsidies augmented by community savings and cash or in-kind not-for-profit contributions. Similar approaches under different names exist in other cities such as Nairobi.



Inclusionary housing

Inclusionary zoning refers to legislation obligating developers to allocate a minimum of 20% of housing units in new developments as rent-controlled, based on affordability criteria for low-income tenants. Additional floor space, height or bulk service contributions are offered in exchange but are negotiated on a case-by-case basis. This policy is in the early stages of implementation in some South African cities, and policy is also being developed in Kenya and Ghana.



Rental Housing Act, 1999

South Africa conveys legal rights to rental tenants, as well as informal and illegal occupiers of land, that offer protection against unjust evictions through the Rental Housing Act, 1999. To prevent opportunistic land grabbing and protect the rights of landowners, conditions such as providing proof of long-term occupation of land are required. In contrast, other cities such as Addis Ababa offer no protections to informal settlers or tenants, and transport development projects result in mass evictions and slum clearing. In recent years these practices have generated widespread unrest and revolt.



Community Benefits Agreement

By law, private developers must engage with communities and demonstrate how new development will benefit wider or adjacent existing communities, often providing community facilities or improvements to bulk infrastructure supply as a benefit. Major criticisms have been levelled against this tool, as it is sometimes seen as a means for influential community members to secure personal or partisan political benefits as an incentive for agreement to development.



The right to shelter

The South African constitution and Bill of Rights obligate the state, but not private developers, to offer occupants decent housing if they are evicted or driven out by new development, even if they are informal settlers, as long as they can prove long-term occupation. Criticisms of this right have been that the obligation does not specify the type of shelter or proximity of the new housing provision in relation to the original place of residence and often results in social disruption, isolation from work and opportunities and the severing of community ties.



Finance Linked Individual Subsidy Programme

In South Africa, Finance Linked Individual Subsidy Programme is an initiative that offers state-subsidised commercial bank loans to help facilitate greater middle-income home ownership, specifically for those who do not qualify for low-cost housing subsidies but who would not be eligible for fully commercial home loans without support. In other Sub-Saharan African cities, such protection policies are non-existent.



Rent control: Social Housing Regulatory Authority

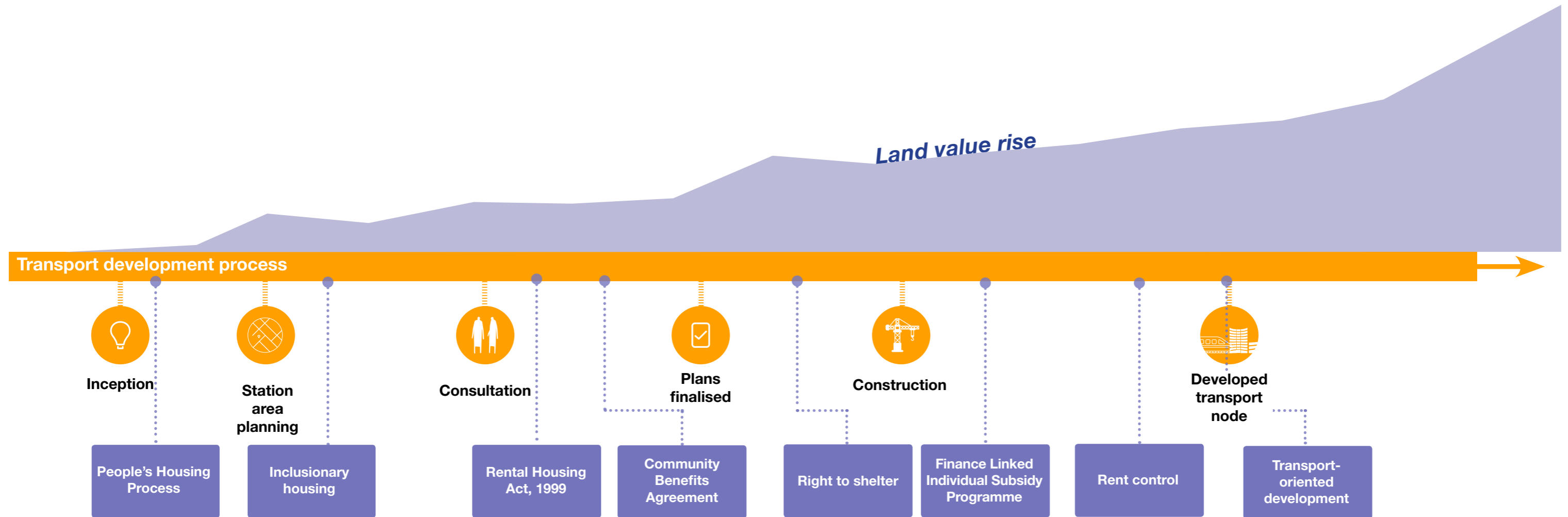
At present, only rentals deemed "social housing" are rent-controlled in South Africa, with rents set centrally by the Social Housing Regulatory Authority (SHRA). Private developers can build social housing subject to the approval and continuous oversight of SHRA. SHRA has been criticised as only catering to a small segment of the housing market and determining rental costs at a national level, which does not consider locational differences in affordability and incomes.



Transport-Oriented Development

Transport-oriented development (TOD)—an increasingly popular development strategy referring to new communities developed around transport nodes—is emerging as a key strategy in African cities to support mixed-use, mixed-income development. Cities use TOD a counter measure to city sprawl and a means to address spatial inequality and a lack of well-located housing and integrated work, recreation and education opportunities for the urban poor. Its emergence as a tool of choice is driven by the reality that many cities across Africa are developing mass transport systems and plans. TOD is thus seen as having the potential to significantly restructure cities and promote compaction and densification.

Social Equity Toolkit timeline



Inclusionary housing



What is inclusionary housing?

Inclusionary housing policies are quickly gaining traction as a tool to accommodate those in need of affordable housing in African cities. South Africa is a frontrunner in pursuing this policy, which aims to both stem the displacement brought about by the strong trend of renewal in its inner-city areas and as a means to extract some value from private housing developers who are seen as the primary profiteers of bulk infrastructure provided by cities.

Current inclusionary housing policies in South Africa require all private developers who are building more than 10 new housing units or converting existing floor space to housing units to dedicate at least 20% of the total number of units as “affordable” rental units. These units must accommodate low-middle-income and low-income households at a housing cost which is deemed affordable according to the city.

When should inclusionary housing be implemented?

The policy is implemented at the stage when a development or land use application is made for a housing development. Inclusionary housing is a condition required in order to approve the development. If owners or developers do not comply with the inclusionary housing conditions, the City may take action.

What works well?

- Reduced burden on the public sector for affordable housing provision
- Private-sector incentives including density bonuses, park contributions and engineering services contributions, as well as access to government subsidies subject to specific development conditions
- Ability for cities to recoup some of the costs of bulk service provision, which in South Africa can equate to half the completed unit cost

What are the unintended consequences?

- Difficulty accessing public schools, public healthcare facilities or commercial centres, as service providers in high-income areas cater to higher-income individuals
- Developers may find having to provide affordable housing an inconvenience, and will therefore avoid developing housing with more than 10 dwelling units at a time and create even more delays in the city approval systems

What are the challenges?

Stigma against affordable housing

Viewed as over-regulation by developers

Social cohesion among different income levels and access to supportive services

Inclusionary Zoning Housing Policy Johannesburg, South Africa

Johannesburg has seen an increasing trend of inner-city regeneration by the private sector, which has been strongly encouraged by municipal government policy. While gentrification benefits individuals who are gainfully employed and young, indigent individuals who have been living in derelict buildings are being displaced. Private developers have been achieving strong yields by clearing and redeveloping derelict buildings. Although development also leads to increased government revenue, this falls far short of the ability to provide decent replacement housing to new rural migrants and those displaced as a result of gentrification who would previously be absorbed within the inner city. The adoption of an inclusionary housing policy is one way that the City seeks to address this issue.



Rental Housing Act, 1999



What is the Rental Housing Act, 1999?

The Rental Housing Act, 1999 defines the responsibility of the government with regards to rental housing property. It aims to increase the provision of rental housing for low-income South Africans and improve access to adequate housing. Additionally, it governs the relationship between landlords and tenants, providing renters with protection against unlawful evictions or privacy violations. It does so through the establishment of Rental Housing Tribunals, which handle conflict resolution between landlords and tenants.

When should it be implemented?

This Act is applicable whenever there is rental of property by lessees. Provisions of the act in relation to unjust evictions and/or notices of evictions can be triggered by either tenants or landlords at any time. The act sets out the process for mediation and resolution and stays any actions of the landlord against the tenant, legal or otherwise, while the process is being decided.

What works well?

- Establishment of new legal rights for tenants (repeal of *Rent Control Act, 1976*).
- Prevents unfair evictions by landlords
- Establishes a common ground for tenants and landlords in the cases of disputes

What are the unintended consequences?

- Expired leases overlooked by the justice system

What are the challenges?

Tribunals decide on disputes and can set aside lease agreements

Lack of acceptance by landlords

Still at risk of price increases due to upgraded stock and value

Maphango v Aengus Lifestyle Properties

Johannesburg, South Africa

The court case of *Maphango v Aengus Lifestyle Properties* signified a substantial transformation in the South African landlord-tenant regime, as it empowered Rental Housing Tribunals to grant tenants substantive tenure protection. Tenants can approach these Tribunals and hold landlords accountable for unfair practices, such as exploitive rents, grounds for termination that unreasonably prejudice tenants' interests and inadequate maintenance. A significant distinction between this approach and the protective measures included in rent control statutes is that the burden of proof rests with the tenant firstly to approach the Tribunal and secondly to convince the Tribunal that the landlord's practices are unfair.



Rent control: Social Housing Regulatory Authority



What is rent control?

Rent control in the South African context is limited to the narrow definition of social housing units and does not include housing developed through other processes or housing areas located in proximity to mass transport. In addition to this formal measure, city authorities have been encouraging private developers to use housing size restriction as a rent-control mechanism.

Tenants in rent-controlled social housing units are vetted to ensure they meet affordability criteria and are required to report changes in household income. The SHRA sets the rental rates, which are reviewed annually and is also responsible for managing or authorising management of social housing by private or not-for-profit developers. Its rules set out management and maintenance requirements as well as processes for eviction.

In other African countries, a lack of available literature on rent control indicates little use of this tool.

When should it implemented?

Rent control is mandated wherever there is rental of units defined and managed as social housing property by lessees. It is usually implemented on housing developments of greater than 40 units for ease of management.

What works well?

- Ensures that poor residents have access to some level of rent control
- Sets maximum allowable rents for low-income tenants
- Clear management and maintenance rules as well obligations placed on tenants to maintain quality

What are the unintended consequences?

- Loopholes by residents failing to supply honest and/or updated information
- Affordability controls not specific to different urban areas and established based on national median-income data
- Large management and/or oversight burden on a state authority.

What are the challenges?

Focus on a single market segment only and restricted definition of unit types

Location not considered as a factor in approval of social housing

Large amount of exempt property—only applicable to defined social housing

Hope City

Middleburg Mpumalanga, South Africa

Hope City is an integrated social housing project offering a diversity of unit types, innovation in construction and delivery processes and quality urban spaces. The development is one of few social housing developments that is socially and racially integrated and serves as an example for South African social housing projects. The Mpumalanga Housing Finance Corporation was set up and registered with the SHRA to build the development.

Located at the edge of a middle-class suburban town, there were initially some problems with local residents opposing the scheme, as they thought it would be a low-cost and low-quality development. The local community held meetings to clarify the type of development being proposed, and the impact that the construction of 500 houses would have on the local economy. A show house strategy involving the building of 12 units quelled concerns about the project.



Transport-oriented development



What is transport-oriented development?

TOD is a development strategy that aligns land development with transport provision, allowing the benefits of public transport access to spread to a larger number of people.

When should it be implemented?

As African cities plan new transport systems, they increasingly see TOD as a strategy with the potential to restructure cities and move away from existing patterns of sprawl and inequality.

TOD should be planned ideally before transport is implemented, and land should be banked and allocated to lower-income housing before land costs are pushed up by transport provision, amenities and convenience.

What works well?

- Integrated, walkable settlements that provide optimal connection to transport systems
- Increased intensity and variety of land uses allowing residents to meet most of their immediate needs within walking distance
- Supportive spaces such as parks and open space, as well as community and civic facilities

What are the unintended consequences?

- Can increase an area's desirability and inflate cost of living
- Often developed in peripheral areas, offering short-term developer gains, rather than in more centralised locations, which would promote more sustainable living and access to opportunities

What are the challenges?

A prevailing car-dominated culture

Persistent aspiration of single-dwelling suburban living as a sign of success

Difficulty in capturing land value increases from private owners under current laws

Rosebank TOD Johannesburg, South Africa

When South Africa's first high-speed rail project, the Gautrain, was built, Rosebank station was identified as a pilot TOD. Located north of Johannesburg's central business district, Rosebank was already a well-established node comprised of a mix of primarily retail and office uses. The implementation of the TOD concept was thus aimed at revitalising an existing urban node, as well as promoting residential intensification.

Rosebank is now also served by various modes of transport, including private cars, the Gautrain and its bus feeder services, Metrobus, metered taxis, minibus taxis, as well as the proposed bus rapid transport system. Meanwhile, the mix of uses in the Rosebank study area promotes walking within the neighbourhood.

Land values in Rosebank have more than doubled since the introduction of TOD, but unfortunately neither this value nor the opportunity to provide well-located low-income housing in this node have been explored.





3: AUSTRALIA

Australia in context

Unaffordability in Australia is the centre of ongoing debate. This trend is reflected in major Australian cities such as Melbourne and Sydney, spurred by growing population pressures and a demand for housing that vastly outstrips supply. Not only has this increased high national rates of homelessness, but it has also displaced whole communities in the face of increased urbanisation and development pressures. With a large decrease in peri-urban and rural farming and agricultural professions in the Australian landscape, there has been a significant shift towards urban living, with 90% of Australia's population now residing in urban areas. Placing high pressure on metropolitan and urban-fringe regions, once low-income and undesired areas are now becoming highly sought-after, with expensive residential developments pushing out existing residents and displacing communities into areas of poorer accessibility, amenity and opportunity.

This means that, despite available regional land and affordable rural living options, pressures on cities to deliver equitable housing stock and infrastructure remains a significant issue. We see evidence of this in Melbourne's Metropolitan Growth Boundary, continually being flexed over time to encompass the demand for urban living and planning requirements. This too is occurring in the nation's most populous city, Sydney, whereby a shift from a mono-centric to a poly-centric model, as outlined in the Greater Sydney Commission's "A Metropolis of Three Cities", has enabled further alterations to land zoning to allow for fast-paced urban development. Such actions initiate intense competition around available land, especially in areas where infrastructure promises residents access to jobs and services.

The key focus of this chapter is to examine the policy measures currently in place in Australia that address residential affordability. Alongside a rapidly expanding urban population, heavy investment in infrastructure is stimulating renewal in urban areas. In the face of significant regeneration, affordability mechanisms are essential in ensuring that the fabric of existing communities can be sustained and prosper in the midst of change. If robust measures to address affordability are not implemented and enforced, not only will this result in insufficient housing stock that is affordable for prospective residents, but it will also lead to the displacement of existing residents due to gentrification, altering the community aesthetic and culture of Australia's cities.

Australian Social Equity Toolkit



Unlocking supply

Releasing undeveloped crown land to increase housing availability



Inclusionary zoning

Regulations or incentives for a dedicated portion of new developments to be designated for affordable housing



Fit-for-purpose housing models

Innovative housing typologies that prioritise community, sustainability and affordability



Diversified housing stock

Accounting for medium-density housing typologies



Energy-efficient fit-outs and builds

Long-term savings and environmental benefit through energy-efficient building construction and operation



Rent-to-own models

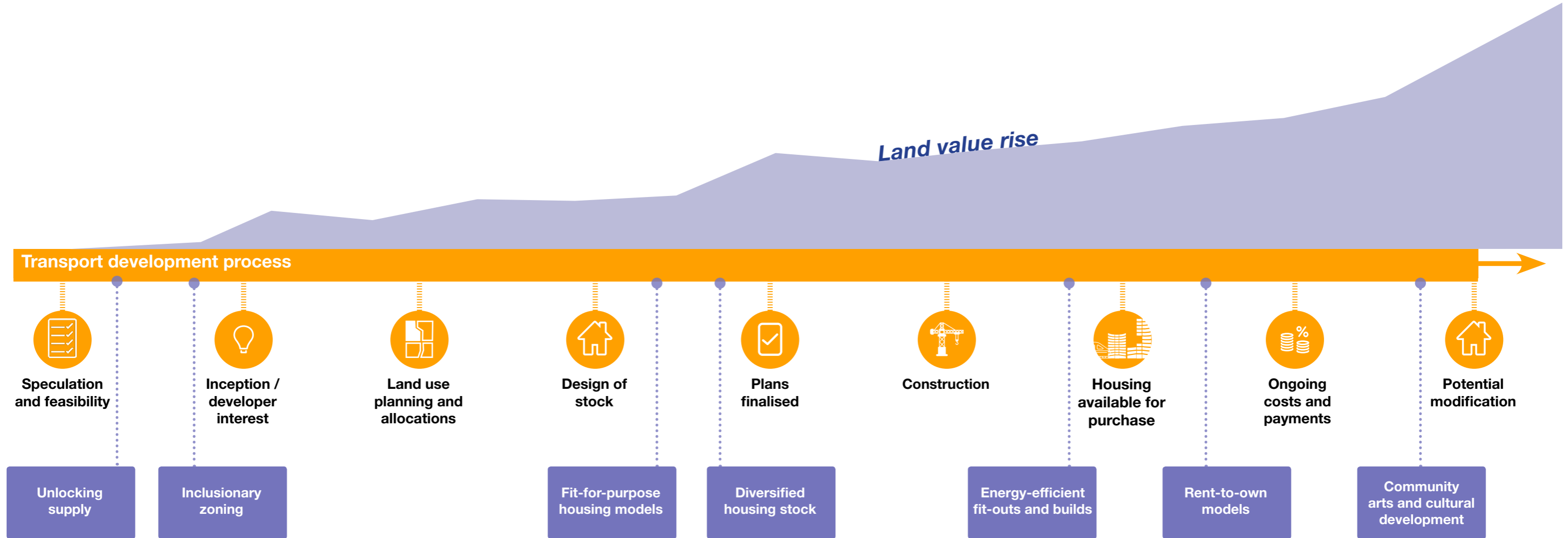
Financial and technical assistance for commercial tenants who are not in a position to purchase the properties they occupy



Community arts and cultural development

Promotion of local cultural institutions and programming to maintain and improve social and cultural fabric

Social Equity Toolkit timeline



Unlocking supply



What is it?

As a geographically vast country, Australia has large amounts of crown land (comprising nearly a quarter of the country's land mass), much of which borders urban areas. While typically banked for public infrastructure and military uses, a significant portion is currently vacant. Thus, in many cases, this land could be better used for much-needed residential and mixed-use development. Due to uncertain future development prospects, large pockets of desirable land sit idle in anticipation for potential future ventures or urbanisation. While sometimes essential, prioritisation and reconsideration of the use of this land could help aid Australia's housing affordability crisis by increasing the nation's supply of urban residential land.

According to the 2017-2018 Australian federal budget, the government will ease restrictions that are directly resulting in housing shortages in order to encourage a more responsive housing market. Part of this includes released surplus Commonwealth land in strategic locations.

When should it be implemented?

Unlocking land supply is an initial step, as releasing land can trigger development.

What works well?

- Better use of available land
- Easing pressures on overdeveloped areas
- Housing market relief for city regions
- Opportunities to develop new regions and establish a strategic vision that incorporates adequate infrastructure and amenity from the outset

What are the unintended consequences?

- Rapid influx of developer interest
- Additional amenity and access to services may drive up prices in highly desirable locations
- No guarantee that affordable housing will be prioritised beyond prescribed requirements

What are the challenges?

Can entail a lengthy or cumbersome process

Land may be released on conditions or "leased," creating uncertainty

Difficulty in ensuring a mix of housing types, as well as supportive infrastructure

Defence Site Maribyrnong

Victoria, Australia

Defence Site Maribyrnong in Victoria is releasing suitable surplus Commonwealth land. The 127-hectare site is located in the City of Maribyrnong. Located less than 10 kilometres west of Melbourne's central business district, the area is highly desirable and could help absorb some of the metropolitan region's anticipated population influx. The land was made available in response to the rapidly growing population of the region and has the potential to support up to 6,000 new homes.

The Victorian Planning Authority are currently identifying the opportunities and constraints of the site before moving forward with the vision and design of the new neighbourhood. Already of high interest from major developers, the project is in discussion with the state government and local council, as well as major transport authorities, who will seek to provide strategic transport links through the site.



Inclusionary zoning



What is inclusionary zoning?

Inclusionary zoning is a land-use planning intervention whereby, either through incentives or by government mandate, developers dedicate a proportion of a residential development to affordable dwellings. Affordability metrics vary depending on the development's location, with high-demand urban areas typically expected to offer a higher share of affordable dwelling units than suburban localities.

When should it be implemented?

Inclusionary zoning should be implemented early, during land use planning phases.

What works well?

- Clear metric requirement, with quantifiable provisions
- Enforceable at a local government (council) level
- Controllable and scalable

What are the unintended consequences?

- Disengagement from developers due to loss of financial gain
- Disinterest from other residents due to stigmatised views of affordable housing and the types of residents who occupy this property type

What are the challenges?

Loopholes in policy providing means for reduction

Low national requirements for affordable dwellings compared to those in other countries

Stigma of residents and attitude towards co-locating with affordable housing

Australian inclusionary zoning

South Australia's capital city of Adelaide has a relatively low urban growth rate of 0.7% per annum, compared to larger cities such as Melbourne and Sydney, which are growing at annual rates of 2.6% and 2.1%, respectively.

However, despite a notably smaller urban population growth rate in Adelaide, the city has significantly higher requirements for inclusionary zoning. In Adelaide, 15% of new dwellings in all significant development projects must be affordable, with 5% of these dwellings catering for high-needs groups. Comparatively, only 2% of housing stock in New South Wales (Sydney's state) is comprised of affordable housing. The discrepancy between these figures are reflective of demand, with Sydney housing in very high demand for all income groups. However, the neglect of commitment to affordable provisions is clear, and it is crucial that these requirements are increased to ensure equitable housing options for all.



Fit-for-purpose housing models



What are fit-for-purpose housing models?

The typical Australian household is changing, both in terms of physical structure and occupant needs. The “Australian dream” of a large, detached suburban house has shifted to one of smaller-scale urban living and less traditional household compositions. This move reflects a growing desire to live close to amenities, services and employment hubs. Increasingly, this accessibility is a driving factor behind property uplift, and, as a result, housing prices in Australia’s largest cities are 17 times higher today than in 1980.

Flexible living arrangements and lower running costs associated with compact dwellings are also of increasing desirability, as work and living arrangements become less traditional in modern Australia.

Many developers in Australia are seeking to respond to this issue by experimenting with new housing typologies that prioritise community, sustainability and affordability in urban contexts. These structures also have a focus on wellbeing and sustainable living practices, evidenced through shared facilities and promoting active lifestyles, integrating policies such as omitting individual car-parking spaces.

These unique fit-for-purpose housing models also offer more flexible and affordable housing options. The providers are able to leverage financing for affordable housing from several sources, such as savings on developer margins, goods and services tax (GST) exemptions, reduced developer contributions, gains through the land-use planning system and more.

When should fit-for-purpose housing be implemented?

Early, in land use planning phases

What works well?

- Alternative to status quo, creates new market option
- More flexibility in ownership
- Less focus on financial gain than with traditional developers
- Often innovative design to assist with reducing construction costs

What are the unintended consequences?

- Purchasers of these properties may not align with the desired occupant, as housing stock, while offered at a lower cost, may still be purchased by affluent citizens.
- Local council pushback when a design is non-compliant
- Opposition from local communities (‘NIMBYism’)

What are the challenges?

Higher risk than traditional models, with barriers for designs driven by users not legislation

Less buy-in from developers due to reduced profit margin

Nightingale Model Melbourne, Victoria

The Nightingale Model embodies affordability, sustainability, community contribution and transparency through collaborative decision-making. Under the Nightingale Model, in a new housing development, decisions around housing typology, design, materials, and even ground-level commercial tenants are largely driven by the residents who will be living there. Other notable elements include capped purchase and resale prices on the apartments, ensuring ongoing affordability for current and future residents, as well as environmentally sustainable building materials and practices.

The process of developing housing under the Nightingale Model begins with potential purchasers their registering interest online. The developer then secures a site for development and puts a design survey out to potential purchasers to understand building requirements and desires of residents. Buyers who respond to the survey form the project’s “long list”. The developer then submits a town planning application, encouraging applicants on the development’s long list to participate in the process. Final apartment prices are confirmed once negotiations with the builder are finalised. Purchasers who are short-listed nominate their preferred apartment.



Source: Nightingale Housing

Diversified housing stock



What is a diversified housing stock?

The typical housing stock in modern Australia is primarily a mix of low-density single-frontage properties and medium- to high-density units in urban regions.

However, there is a clear gap in medium-density options, labelled as “the missing middle.” Medium-density residential typologies includes town houses and duplexes, which, though common in Australia until the 1940s, have become less common due to shifting preferences towards low-density suburban living and more recent pushes back to urban lifestyles.

The Missing Middle highlights lacking home options in the Australian landscape and is part of ongoing residential debate around the nation’s affordable housing crisis.

When should they be implemented?

During precinct planning

What works well?

- Diversity attracts a broader market
- Greater mix of residents engaged in regions, resulting in more demographic and socioeconomic diversity
- Diversity of options creates more character and individuality in communities

What are the unintended consequences?

- May require a broader range of stakeholders to plan and create housing types
- Housing types may not be desired in a certain area, with lack of sales leading to profit loss

What are the challenges?

More time-consuming to design an array of housing types

Housing stock may not necessarily be affordable to target users

Hard to make options for all; some gaps may still emerge in stock

Density and Diversity Done Well Queensland, Australia

The Queensland government recognised the need to expand its range of housing options to meet modern community needs, urban challenges and future environmental considerations. In 2017, Queensland launched Density and Diversity Done Well, a design challenge to respond to the need for more diverse housing options. The challenge attracted more than 100 multidisciplinary responses. The teams each looked at a typical neighbourhood block containing 20 dwellings, as often seen in Australian suburbia. Participants were encouraged to break the rules of typical development and think about a range of a liveable and efficient design solutions.

The winning design, Dappled Dwellings by TRIAS, increased the number of dwellings in a neighbourhood block from 20 to 52 through higher utilisation of land and vacant structures without overcrowding. It allowed work to proceed organically, without excessive capital costs and unnecessary demolition. It looked at incrementally changing micro-dwellings and yard space while making the most of existing structures. The approach allowed for incremental change and a simple financial model, however would require planning considerations and changes in areas to proceed without zoning restrictions.



Energy-efficient fit-outs and builds



What are energy-efficient fit-outs and builds?

Developing a more energy-efficient and sustainable housing stock is not only beneficial for the broader environment but also imparts a long-term financial incentive for property developers and dwelling owners by sustaining lower running costs. Techniques such as passive heating and cooling with considerate use of materials can create insulated, ventilated, comfortable and efficient housing options.

Institutes such as Passive House Association in Australia aim to help spread this knowledge and expertise in order to allow everyone to live in healthy, comfortable, low-energy, resilient and affordable buildings.

Worldwide, ample examples of energy-efficient and sustainable housing design can be seen deployed in diverse regions. It is clear that a shift towards sustainable dwellings could be more broadly implemented in the Australian context.

Prioritisation for, and enforcement of, energy-efficient development through building standards could not only encourage more sustainable practice and construction methods, but in turn significantly reduce living costs for current and future residents.

When should they be implemented?

During building design and construction

What works well?

- Long-term cost savings for current and future residents
- Sustainable, environmentally friendly
- Less reliance on gas or electric appliances
- Impacts seen for livelihood of building

What are the unintended consequences?

- Upfront costs may be higher
- Process may be more time-consuming than more traditional building design

What are the challenges?

Higher upfront costs, eliciting pushback from developers

Less traditional

May be harder to promote long-term over short-term benefits

Smart Urban Villages Melbourne, Victoria

The team at Smart Urban Villages create sustainable housing options which are accessible to prospective residents without the need for a mortgage. This environmentally friendly approach is tailored to those who are interested in the project with engagement between developers and prospective residents from an early stage. It uses mechanisms such as common facilities to decrease costs, paired with industry-leading environmental standards to ensure lower running costs for owners.

Ensuring that affordable living extends beyond just affordable housing, the provider also offers long-term rental options (offered for more than 5 years), giving residents stability, as well as the option to pursue in advance.



Rent-to-own models



What are rent-to-own models?

Rent-to-own models offer financial and technical assistance to both residential and commercial tenants who are not able to purchase the properties they occupy. As a result, tenants are safeguarded from rapid rises in rental prices while on the path towards ownership, promoting the long-term sustainability of local communities and helping to maintain local character.

Such interventions are a response to landlords of unregulated properties imposing unexpected, non-negotiable and unaffordable rent increases on their tenants. They offer greater security of tenure, including a possible pathway to ownership if desired without being subject to market increases. Having an initial fixed-term lease provides security and the opportunity to get to know local communities and surrounds before committing to long-term purchase. While not common practice within Australia, properties are beginning to emerge with this model to aid housing and business security and access to property for those who are renting.

When they be implemented?

Early, in land use planning phases

What works well?

- Flexibility towards ownership commitment
- “Try before you buy”
- Limited inflation

What are the unintended consequences?

- Not viable for all
- Lack of return on investment
- Long-term leasing may not suit all lifestyles

What are the challenges?

Less initial financial gain for developers

Potentially limited financial gain on resale for tenants

Exit conditions may differ per development

Assemble Communities Melbourne, Victoria

Through partnership with local development firm “Make Ventures”, Melbourne-based Assemble Communities sought to bridge the gap between renting and home ownership. A more accessible pathway to home ownership was created by enabling tenants to secure a five-year lease with the opportunity to buy at the lease conclusion, via paying a three-month rental bond. The purchase price is agreed upon upfront, calculated at current prices with a fixed 1.75% increase per year, until purchase approximately seven years later (two years of building and five years of leasing). Ultimately, potential homeowners are given the time to save, plan and become familiar with their neighbours, community and the dwelling prior to committing to buy.

Other companies in Australia are seeking to take a similar approach. For example, Smart Urban Villages in Melbourne focuses on creating affordable access and collective amenity in a sustainably built and operated development. While Smart Urban Villages is still in feasibility testing, their model will also seek to use a “rent-to-own” system in which a fixed rental term can build into a housing down payment and ownership.



Community arts and cultural development



What is community arts and cultural development?

Ensuring supportive community infrastructure in the form of cultural institutions, recreational programmes and creative opportunity in the midst of developmental change in a neighbourhood is crucial to maintaining and improving the social and cultural fabric of a place. Preserving identity and culture during change is pivotal for community cohesion, cultural diversity and the prosperity of a region. Mechanisms that foster arts and culture not only create relationships between residents but provide further opportunity for gathering, connection and expression.

Residents should have a large role in determining the scope of these mechanisms or programmes, which should be responsive to unique community needs and not assumed or imposed. Creating ownership of the community fabric and creating identity will allow these programmes to act as a pillar in the community despite changes in surrounds.

Community arts and cultural development can take many forms, from specific programmes to allocated community space. While it may not generate financial revenue for a locality or developer, allowing for this space can foster a community that is both connected and accepting.

When should community arts and cultural development be implemented?

Land use planning, building design, construction and beyond

What works well?

- Community prioritisation and involvement
- Ownership over community assets
- Community cohesion
- Celebration of arts and culture

What are the unintended consequences?

- Division among community groups
- Lack of engagement or interest

What are the challenges?

Obtaining substantial funding for community enjoyment and benefit

Ongoing management

Collingwood Arts Precinct Melbourne, Victoria

In 2010, Creative Victoria took over management of the former Collingwood Technical College. Since taking over management, approximately half the grounds are now home to Circus Oz, and the other half is being transformed into a contemporary creative precinct.

The former college has a range of buildings and entrances, allowing for a diverse range of community users and uses through separate programmes and creative uses on the site.



4: HONG KONG

Hong Kong in context

Among the primary economic powerhouses in the Asia-Pacific Region, Hong Kong's economy and population are undergoing continual growth. Yet Hong Kong is one of the most compactly settled cities in the world. Due to an expansive network of national parks, conservation zones and environmentally sensitive areas, some 7.4 million people are squeezed into approximately 15 percent of Hong Kong's landmass. Thus, property prices in Hong Kong rank among the world's most expensive.

Owing largely to these space constraints, Hong Kong is no stranger to issues of development-induced displacement. As demands for living and working space continue to outpace supply, and as land values continue to climb higher, high-profile development and redevelopment projects are increasingly met with opposition due to perceived negative impacts on local communities.

However, compared to the other cities and countries profiled in this report, Hong Kong has yet to develop a robust system of policies to protect residents or businesses against displacement. While some tools are under development, their application to date has been fairly limited. Thus, this chapter explores some of the prevailing displacement issues in Hong Kong, presents specific case studies of areas that have experienced displacement and cultural change and highlights the emerging toolkit of government policies designed to address displacement.



Source: Priscilla Fraire

The challenge

Transport-induced displacement

Hong Kong's real estate market operates under the "Rail + Property" (R+P) model, one of the world's most sophisticated TOD practices. Under this framework, rail stations not only serve a transport purpose, but they also explicitly pave the way for new development: the Hong Kong government grants land development rights adjacent to new or existing rail stations to Mass Transit Railway (MTR), the local transport authority, which works with developers to build mixed-use buildings—incorporating retail, office, educational, residential, and other uses—atop new stations. MTR then uses a portion of revenue from new developments to fund further rail construction. While this model has allowed Hong Kong's development to thrive in its compact setting, it has also brought about varying levels of displacement.

Transport-induced displacement can be observed along and/or near MTR lines and stations. These areas are likely to be transformed into valuable developments, which inevitably result in higher land values and property prices. For instance, since the opening of the South Island Line (East) in December 2016, a dramatic increase in property prices around its stations has occurred. Flat prices in South Horizons have leapt from an average of HK\$13,320 (£1,300) per square foot to HK\$15,300 (£1,500) over the course of just one year (SCMP, 2017). In a 2016 interview, a Southern District councillor said that rent for a 900 square-foot shop has tripled from HK\$20,000 (£1,900) to HK\$60,000 (£5,750) since the start of the construction of the line.

On the one hand, new MTR lines generate positive economic impacts, such as investments in infrastructure and the creation of new shops, jobs and housing units. On the other hand, smaller business owners are often unable to afford new rents and are forced to relocate elsewhere. If this trend continues in the coming years, the threat of displacement can be expected to intensify.

Urban renewal-induced displacement

Through the Urban Renewal Authority (URA), the Hong Kong government works to rejuvenate neighbourhoods by restoring dilapidated buildings, promoting environmentally sustainable design and mobility and preserving historically significant structures. The URA represents a key government strategy to boost the local economy and address the city's housing shortage.

However, numerous case studies indicate that urban redevelopment projects often result in displacement; by increasing the desirability of renewal areas, these projects can drive residents into less desirable neighbourhoods or areas further out from the city centre. Once redevelopment projects commence, speculation for buildings surrounding the station pushes the cost of living higher until prices become unattainable for long-time residents.

Social Equity Toolkit timeline



Flat-for-flat scheme

Compensation to displaced residents with a nearby flat to maintain community cohesion in the face of redevelopment and relocation



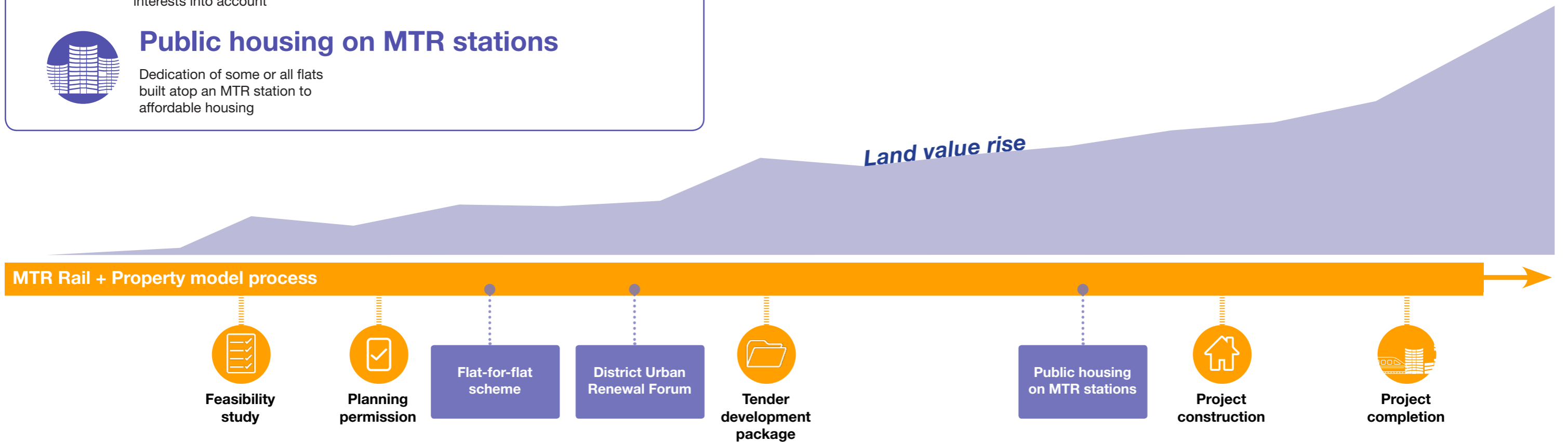
District Urban Renewal Forum

Public platform designed to ensure that urban renewal projects take local character and interests into account



Public housing on MTR stations

Dedication of some or all flats built atop an MTR station to affordable housing



Flat-for-flat scheme



What is a flat-for-flat scheme?

URA redevelopment projects can result in displacement of residents, even homeowners, from their flats. However, to make sure that displaced homeowners are not forced to move to distant locations, and to preserve existing social networks within regenerated communities, the Development Bureau created a scheme called “Flat-for-Flat” (FFF) as part of the 2011 Urban Renewal Strategy. Rather than merely offering cash compensation to flat owners, this scheme provides impacted owner-occupiers an equivalent flat in the same district as compensation. The owner-occupiers who opt into the FFF Scheme must first accept cash based on the appraised value of a seven-year-old replacement flat. They can then use the accepted compensation amount to either purchase a flat on one of the lower floors in the in situ redevelopment or in a new, proximate building developed exclusively for participants in the FFF Scheme.

When should it be implemented?

FFF should be implemented around the time of property acquisition, which takes place during the planning permissions stage.

What works well?

- Regeneration of neighbourhoods while allowing residents to remain living in their home neighbourhoods
- Maintenance of existing social networks while enabling development and absorption of new residents

What are the unintended consequences?

- Government still ultimately decides where displaced homeowners may live
- New flats may be smaller, offer less light or amenities, or otherwise fall short of the comforts and conveniences homeowners may have enjoyed in their own flats

What are the challenges?

High cost to government

Time-consuming process



District Urban Renewal Forum



What is it?

A District Urban Renewal Forum (DURF) is a public platform with the express purpose of ensuring that urban renewal integrates local characteristics, community aspirations and public interests at large. The functions of a DURF include advising the government on urban renewal plans from a holistic and integrated perspective, conducting engagement exercises or studies funded by the Urban Renewal Trust Fund, monitoring progress of redevelopment projects and acting in a public education role to all relevant stakeholders. A DURF is chaired by an engineering professional, and membership includes local representatives and technical experts, as well as delegates from involved public agencies. This partnership helps give teeth to community-based planning efforts.

When should it be implemented?

During the planning stage.

What works well?

- Diverse membership grants more legitimacy to public planning efforts
- Gives residents agency over the future of their communities

What are the unintended consequences?

- Unclear

What are the challenges?

Difficulty reaching consensus

Identifying a representative set of community voices

Kowloon City DURF

Established in June 2011, the first pilot DURF is in Kowloon City. It provides the opportunity for people in the community and district to participate in the urban renewal process by expressing their views via workshops, seminars, and other public forums. An online platform was also built for people to have a better understanding of the project and give comments. The DURF was integral to the redevelopment process every step of the way, from preparing an urban renewal plan and conducting community engagement to ensuring a social impact assessment be undertaken before plans are finalised, which is atypical in the urban development process.



Source: District Urban Renewal Forum

Public housing on MTR stations



What is it?

To accommodate population growth and urbanisation, while ensuring that the public transport system is economically viable and self-sustaining, the Hong Kong MTR Corporation employs a business model called the “Rail + Property (R+P) model”. Per MTR’s performance, more than half of all revenues received by the MTR Corporation come from property development.

The financing mechanism of the R+P model starts with the Hong Kong government granting land development rights to MTR for sites along railway alignments by paring land premiums. MTR then builds the railway and rents out spaces to property developers. MTR benefits from the development when property values rise along the railway.

R+P is a popular TOD building model in Hong Kong, not only because it helps to make the rail line self-financing, but also because it boosts transport ridership. In fact, the developments atop MTR stations generate an additional 35,000 weekday passengers to the railway. The R+P model benefits TOD residents as well, as they can easily walk to the MTR station from their homes.

MTR Corporation is seeking to provide public housing on top of train stations. The agency is considering two potential sites: Siu Ho Wan Depot in Northern Lantau and at a proposed MTR station along the Tuen Mun South Extension. The Development Bureau and the Transport and Housing Bureau are also negotiating with MTR on two potential strategies: either requesting that MTR reserve a portion of private flats for conversion to public housing or granting MTR a smaller site for private flats and leaving the remainder for the Housing Authority to construct public housing.

When should it implemented?

During the tender stage.

What works well?

- Housing is self-financed by MTR
- Provides low-income residents easy access to public transport

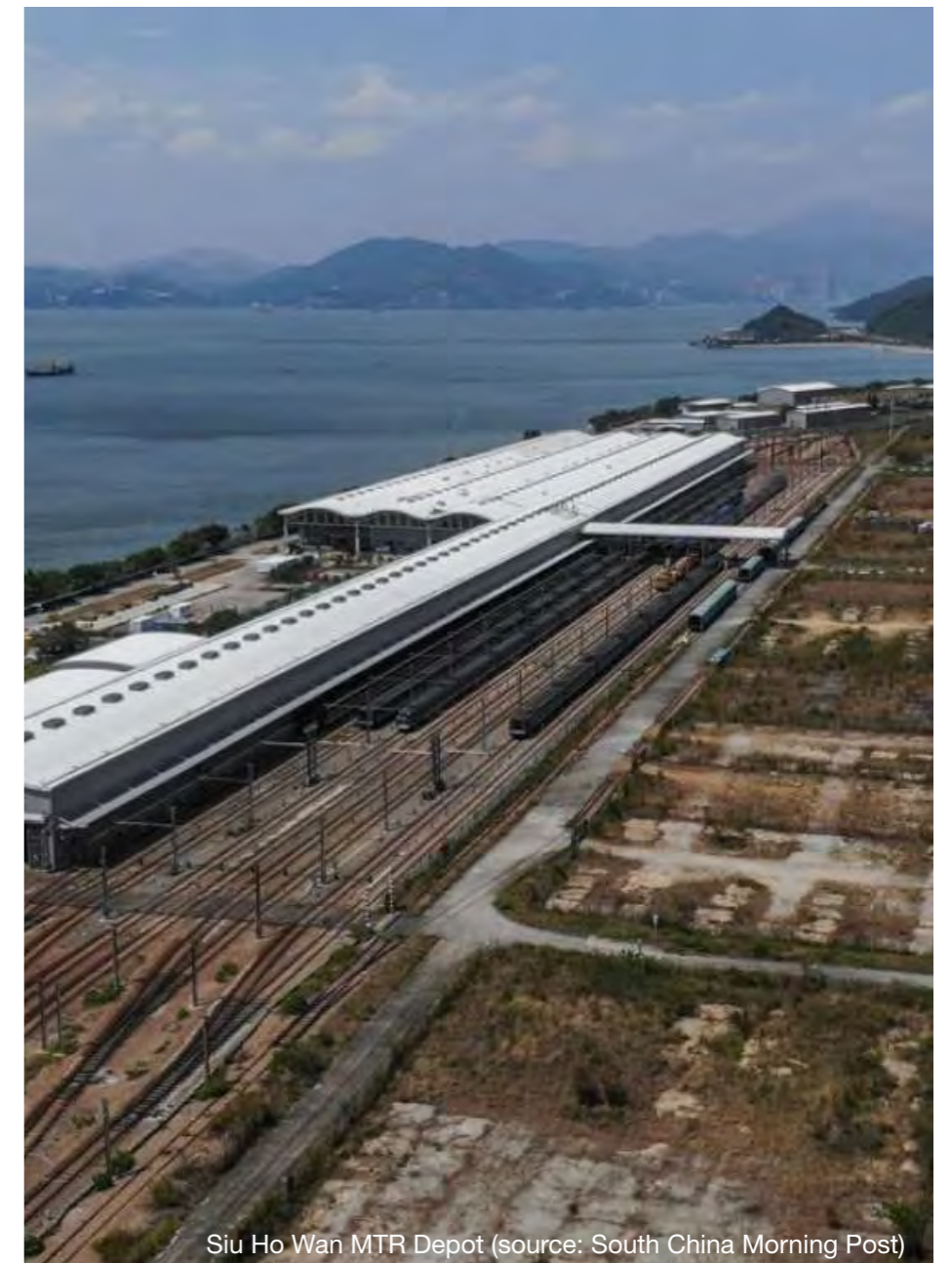
What are the unintended consequences?

- Unclear

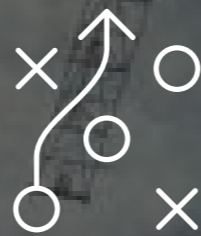
What are the challenges?

No mandate to provide affordable housing

New concept in Hong Kong with little precedent



5: WRAP-UP



Conclusion

The 21st century city is characterized by vibrancy, opportunity and creativity. The rapid evolution of the urban world in recent decades has dramatically increased the desirability of city living.

At the same time, rising property values and inequitable access to urban areas have become defining features of the 21st century city. Across the world, demand for well-located housing outpaces supply, straining housing markets and displacing low-income residents and business owners.

Federal, state and local governments worldwide are making concerted efforts to reverse this trend. This report shows how implementing the right measures at the right time can effectively reduce displacement pressures and ensure more equitable access

to transport and the expansive opportunities of modern-day cities. Through four distinctive Social Equity Toolkits, it illustrates how decision-makers can learn from other cities around the world to advance development without displacement within their own unique housing and policy contexts

Arup understands these challenges. We shape successful transport systems through our uniquely integrated capabilities in transport, buildings, digital, planning and advisory services. But it takes more than good ideas to drive equitable community outcomes. Our technical knowledge comes with a deep understanding of city governance and urban policy implementation—and we offer our advice independently. We are owned by our employees and have a long history in city-shaping infrastructure projects and social development. These Social Equity Toolkits provide measures for development without displacement and channel both our values and skills to help shape a better world.



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