

A CLC-ARUP  
RESEARCH  
COLLABORATION

# The Future of CBDs

PERSPECTIVES  
FROM 6 APAC CITIES

CENTRE for  
**LiveableCities**  
SINGAPORE

**ARUP**



# Acknowledgements

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## About CLC

Set up in 2008 by the Ministry of National Development and the then-Ministry of the Environment and Water Resources, the Centre for Liveable Cities (CLC) has as its mission 'to distil, create and share knowledge on liveable and sustainable cities'. The CLC's work spans four main areas – Research, Capability Development, Knowledge Platforms and Advisory. Through these activities, the CLC hopes to provide urban leaders and practitioners with the knowledge and support needed to make our cities better. For more information, please visit [www.clc.gov.sg](http://www.clc.gov.sg)



## About Arup

Dedicated to sustainable development, Arup is a collective of more than 18,000 designers, advisors and experts working across 140 countries. Founded to strive for humanity and excellence in everything that we do, we collaborate with our clients and partners, using imagination, technology and rigour to shape a better world. For more information, please visit [www.arup.com](http://www.arup.com)



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# Foreword

The future of the Central Business District (CBD) is an important topic for us in land scarce Singapore, given the major role that it plays as a financial and commercial centre for our city. We saw during the height of the pandemic that disruptions can easily impact the way we live, work and play. As we return to the new normal, we want to think about how the CBD needs to evolve going forward to remain resilient to emerging trends and meet future needs. The pandemic gave many cities that necessary pause but also an opportunity to undertake a more transformational rethink for their downtown areas. In fact, some cities made quite big changes during those down times. The future of work may also have been set on a new trajectory, with many adopting new technologies and habits, like work from anywhere, and recognising the need to better cater to new expectations in the ESG space. Hence, we hope that this shared study of CBDs across six APAC cities may provide some insight into how CBDs can adapt and evolve to remain relevant, attractive and competitive.

We convened two roundtables through the course of this study, and this will culminate with a final roundtable at the World Cities Summit here in Singapore in June 2024. Through these efforts, we hope to generate ideas that will be useful in helping us better plan, develop and shape our cities for an exciting future.

## Mr Hugh Lim

Executive Director, Centre for Liveable Cities

CBDs stand as crucial pillars within a city's economic framework, typically contributing 10 to 20% of its GDP. Despite enduring challenges like the COVID-19 pandemic and global financial crises, CBDs have displayed resilience, maintaining their economic significance over recent decades. However, the yardstick for assessing their success has expanded beyond economic metrics. Today, a CBD's vitality is gauged by its vibrancy, connectivity and cultural allure, a shift underscored by the pandemic's reminder of the importance of meaningful urban experiences. Urban competitiveness remains ever pertinent. Cities compete for investment, talent, visitors, events and reputation, and as the dynamic core of a city, a CBD must stay agile, seeking improvement and innovation. Yet, the recurring question persists: what constitutes a competitive city? While fundamental factors like governance, business environment, infrastructure and human capital remain vital, a broader perspective reveals a markedly more complex and uncertain world ahead.

Cities are substantial contributors to climate change, responsible for 75% of global CO<sub>2</sub> emissions. With the private sector increasingly recognising climate change as a tangible risk to their operations, supply chains and long-term viability, CBDs must adapt to shifting needs and demands. External factors like changing behaviours towards remote work also spotlight inequalities in affordability, quality of life and social well-being. These shifts are further compounded by factors such as aging populations, evolving generational preferences and the ever-changing dynamics of urban interaction. The role of a *Centralised* Business District is not the only aspect evolving; the necessity of an environment tailored around business and commerce is being questioned. The future of CBDs thus pivots less on traditional competitiveness driven by efficiency and more on aligning with the evolving needs of society and the planet.

## Andy Hodgson

Director, Global Advisory Leader, Arup

## Chintan Raveshia

Director, Southeast Asia Cities Business Leader, Arup

01

## Introduction & Methodology

 PAGES  
05 – 07

02

## Overview of APAC Cities

 PAGES  
08 – 10

03

## Aspirations & Approaches

 PAGES  
11 – 16

04

## Actions – Case Studies

 PAGES  
17 – 43

05

## Key Takeaways & Conclusion

 PAGES  
44 – 46

## Endnotes

 PAGE  
47 – 48

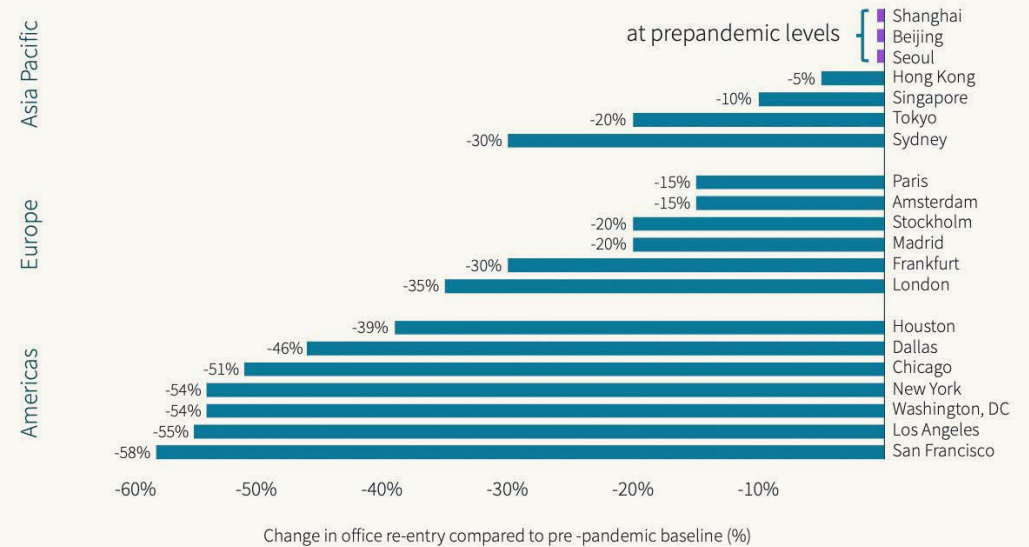
# Background

Central Business Districts (CBDs) have been pivotal hubs in global cities, driving economic growth and job creation. By clustering government administration and commercial services, they also facilitate economies of scale and knowledge exchange. Historically, CBDs have adapted to evolving market dynamics and planning paradigms. Initially dominated by financial institutions and headquarters, they later accommodated more technology firms and modern services as cities transitioned to knowledge-based economies. While some CBDs bustle with workers and tourists, most CBDs experience significant periods of lull after office hours and on weekends, prompting efforts to optimise space utilisation and introduce more mixed uses and activity-generating programmes to inject vibrancy.

The COVID-19 pandemic brought about critical disruptions, and accelerated the need by governments, planners and businesses to re-evaluate the role of CBDs. Hybrid and remote work models led to reduced demand for office space, impacting supporting retail, F&B and other businesses in the area. However, unlike other markets, Asia Pacific (APAC) CBDs experienced a relatively speedier recovery. In May 2023, JLL reported that office return rates in European and American CBDs ranged between 42% and 85% of their pre-pandemic levels, whereas those in APAC clocked in much higher levels: 80% to 100% (refer to image).<sup>1</sup>

APAC CBDs are therefore expected to retain a central role in supporting the vitality of their cities and national economies. Nonetheless, with the rise of emerging trends and critical uncertainties such as new digital and AI technologies, escalating concerns on the effects of climate change, changing lifestyle preferences and increased competition for talent in the midst of global economic uncertainty, etc., CBDs must be able to adapt to better respond to future needs and remain relevant.

## Office re-entry rates vary across global regions



Source: JLL Research, 2023

## Aim of the Study

By looking at CBDs in six APAC cities (Bangkok, Ho Chi Minh City, Hong Kong, Singapore, Sydney and Tokyo), this study by CLC and Arup seeks to uncover the challenges faced by CBDs, their broad aspirations and the approaches to achieve them and critical actions (or initiatives) considered for implementation moving forward. Given each city's unique context, there is no 'one-size-fits-all' solution for developing successful and sustainable CBDs, as what is current in one city may become the future of another. This publication is, therefore, a compact compilation of insights from our six-city study, with common challenges, aspirations and key actionables distilled, to form a practical comparative reference for urban practitioners and policymakers contemplating their first steps in re-imagining their city's CBD of the future.

# Methodology

This study was carried out in two phases. Phase 1 focused on understanding the ‘what’s and why’s’, while Phase 2 delved into the ‘how-to’s’.

For Phase 1, interviews with key city experts and a hybrid-format roundtable discussion involving stakeholders from the six APAC cities were conducted. The aim was to:

- Identify common issues faced and the cities’ aspirations for their CBDs
- Explore potential approaches to achieve these aspirations, as well as gaps, challenges and opportunities encountered
- Discuss the roles and relevance of future CBDs

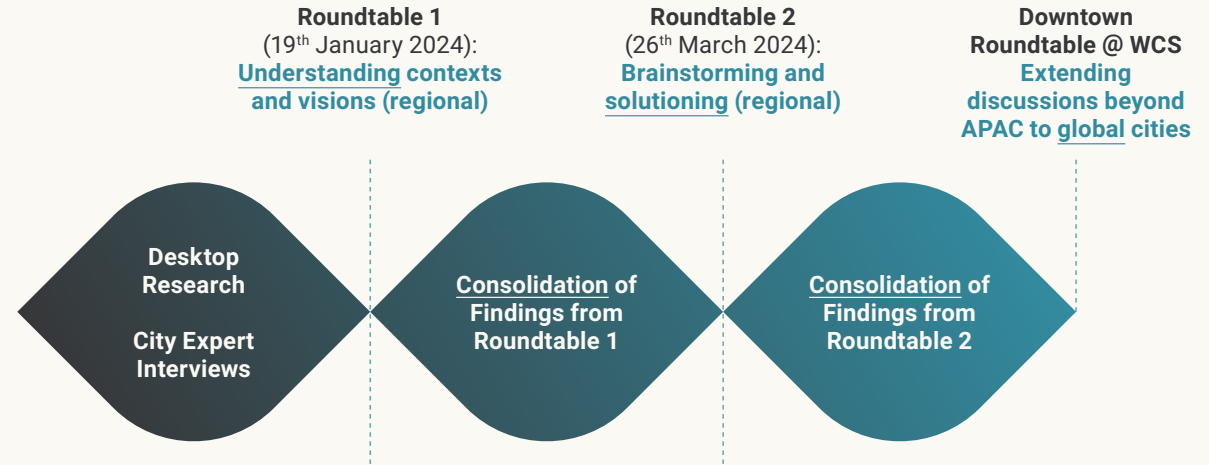
Findings from Phase 1 were consolidated, and analysed to identify the key challenges, common aspirations and approaches for future CBDs in these six APAC cities. The findings were discussed and validated at a second roundtable session (fully virtual) with the same six APAC cities. During the roundtable session, each city also:

- Presented key action(s) that they were undertaking, or planning to undertake, to achieve a specified aspiration
- Identified possible indicators that could help track and evaluate the CBD’s performance level vis-à-vis aspirations over time

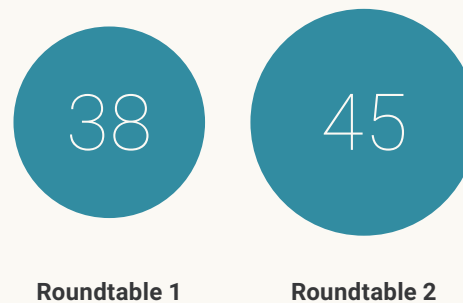
For both roundtable sessions, city experts were invited to share insights and observations on their respective CBDs via the Miro platform. The findings from both phases were analysed and compiled into this report.

A third roundtable on the Future of Downtowns will be conducted at the World Cities Summit 2024 where we will extend the conversation to stakeholders from other cities around the world, beyond the six APAC case study cities.

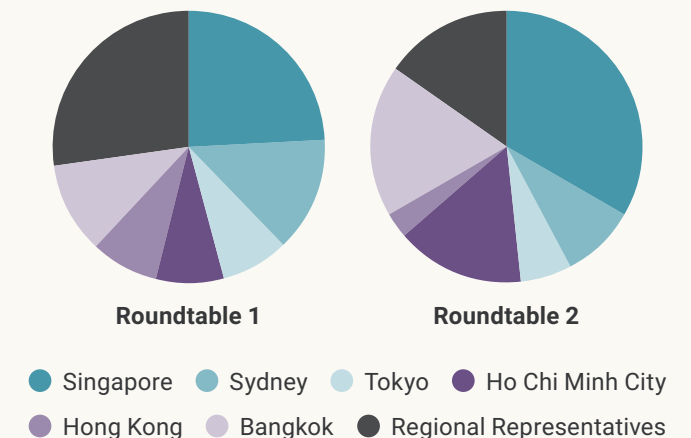
## Summary of the Process



## Total No. of Participants



## Distribution of Roundtable Participants by City



# Graphic Recordings



**Roundtable 1**  
19<sup>th</sup> January 2024



**Roundtable 2**  
26<sup>th</sup> March 2024





## 1. Bangkok

GEOGRAPHICAL LAND AREA  
7,761 km<sup>2</sup> <sup>6</sup>

POPULATION  
10.8 million (2022)<sup>7</sup>

DENSITY  
1,399.8 people/km<sup>2</sup>

Bangkok's economy thrives on tourism, manufacturing and finance. With hybrid work and flexible workspaces becoming increasingly prevalent, landlords are enticing CBD tenants with solutions such as built-to-suit and ready-to-move-in models that allow for adaptive uses of office spaces. The city is also working towards enhancing connectivity and lifestyle amenities within the CBD.

## 2. Ho Chi Minh City

GEOGRAPHICAL LAND AREA  
30,602 km<sup>2</sup> <sup>8</sup>

POPULATION  
22.3 million (2022)<sup>9</sup>

DENSITY  
729.69 people/km<sup>2</sup>

Ho Chi Minh City drives half of Vietnam's economic growth. Initiatives are in progress to revamp public realms, strengthen cultural identity, and improve transport connectivity and infrastructure both on land, as well as across Saigon River to better support the upcoming CBD in Thu Thiem.

## 3. Hong Kong

GEOGRAPHICAL LAND AREA  
1,089 km<sup>2</sup> <sup>4</sup>

POPULATION  
7.5 million (2022)<sup>5</sup>

DENSITY  
6,885.4 people/km<sup>2</sup>

Hong Kong ranks as one of the world's largest trading economies. However, the limited size of its apartments has made remote working less feasible. In response, companies are contemplating a move to higher-quality office spaces. CBD landlords are working towards enhancing the appeal of office work environments.

## 4. Singapore

GEOGRAPHICAL LAND AREA  
735 km<sup>2</sup> <sup>10</sup>

POPULATION  
5.9 million (2022)<sup>11</sup>

DENSITY  
8,049 people/km<sup>2</sup>

As one of Asia's leading financial sectors, Singapore has been working towards bringing jobs closer to homes and decentralising business districts. In the CBD, office buildings are converted to mixed-use developments that support residential and lifestyle needs. The city-state is hopeful that the future CBD will support a vibrant and inclusive way of life.

## 5. Sydney

GEOGRAPHICAL LAND AREA  
12,368 km<sup>2</sup> <sup>12</sup>

POPULATION  
5.3 million (2022)<sup>12</sup>

DENSITY  
428.5 people/km<sup>2</sup>

Sydney offers an agglomeration of businesses and robust transportation systems. Its night-time economy is expanding, and nearby commercial centres are considering relocation to the Sydney CBD due to lower rental costs. With the shift to hybrid work, commercial real estate needs to adjust to the changing live-work dynamics.

## 6. Tokyo

GEOGRAPHICAL LAND AREA  
13,564 km<sup>2</sup> <sup>2</sup>

POPULATION  
36.9 million (2022)<sup>3</sup>

DENSITY  
2,718.3 people/km<sup>2</sup>

Tokyo adopts a polycentric approach with multiple CBDs. These CBDs are transitioning towards more people-centric environments, while enhancing resilience to natural disasters. As businesses upgrade to premium office spaces, landlords often face the challenge of maintaining the appeal of their properties.

## Key Challenges

Common challenges facing APAC CBDs today

### Lack of adequate land for new developments

Many APAC cities have dense urban cores with limited land available in the CBD for new developments or expansion. As a result, these cities have increasingly moved towards decentralisation – establishing multiple polycentres in addition to their original CBDs. In some cities like Bangkok, the CBD consists of numerous small privately-owned parcels of land, posing challenges for consolidation in large-scale district redevelopment.

### Need for greater vibrancy

There has been an increasing trend of people splitting their time between home and the office. For some cities, such as Sydney, workers are settling into a pattern of working in the office from Tuesdays to Thursdays.<sup>13</sup> As footfall in CBDs decrease, it is imperative for measures to be taken to prevent the potential hollowing out of the CBD and underutilisation of its amenities. As virtual meetings and discussions become more prevalent, it is also crucial to provide compelling reasons for users to continue engaging with the physical space of the CBD. CBDs must evolve from being solely mono-use office spaces, and instead diversify its offerings to foster a healthy ecosystem that supports liveliness from day to night.

### Constraints of repurposing existing buildings

As cities mature, buildings age and these older developments may no longer meet the need of modern occupants. Yet, in keeping with sustainability goals, demolition of old buildings is not always a viable option. Many CBDs are pivoting towards mixed-use districts and considering changes to its spatial usage, such as repurposing office and industrial buildings to residential and other lifestyle uses. This is often challenging, due to the technical considerations and constraints from existing building layouts. At times, inflexible and rigid land-use policies may also hinder the conversion of existing developments to other uses.

## Key Challenges

Common challenges facing APAC CBDs today

### Need to improve infrastructure

As the functions of CBDs evolve, there has been a greater impetus to improve the quality and network of infrastructure. For instance, in some APAC cities like Ho Chi Minh City, access to the CBD heavily relies on private modes of transportation. To tackle traffic congestion during peak periods and to promote sustainable mobility, enhancing public transport and infrastructure to encourage walking and cycling is crucial. Such improvements are particularly essential prerequisites for new developments in the CBD.

### Lack of affordable housing

Historically, many APAC CBDs have prioritised business uses over residential space, resulting in lesser space allocated to housing needs. Given the steep cost of prime land in the CBD, there is a tendency for developers to construct higher-value commercial developments. The poor financial viability of building residential units inadvertently contributes to limited live-in options in the city, in particular affordable forms of housing. This further exacerbates the lack of vibrancy in the CBD outside office hours, entrenching CBDs as a less inclusive district.

### Changing work trends

While hybrid work and its impact on demand for office space appear to be less significant in most APAC cities and their CBDs, changing work trends are still anticipated to impact the way people use, demand and perceive spaces in the longer term.





**Good connectivity** remains key to urban vitality as CBDs evolve. This is marked by regional and local connectivity, and accessibility to and from CBDs, as well as within the district.

### Proximity to Transportation Networks

As the economic hubs of cities hosting a myriad of businesses and services, proximity to regional and major transport networks is crucial for CBDs to remain accessible and competitive.

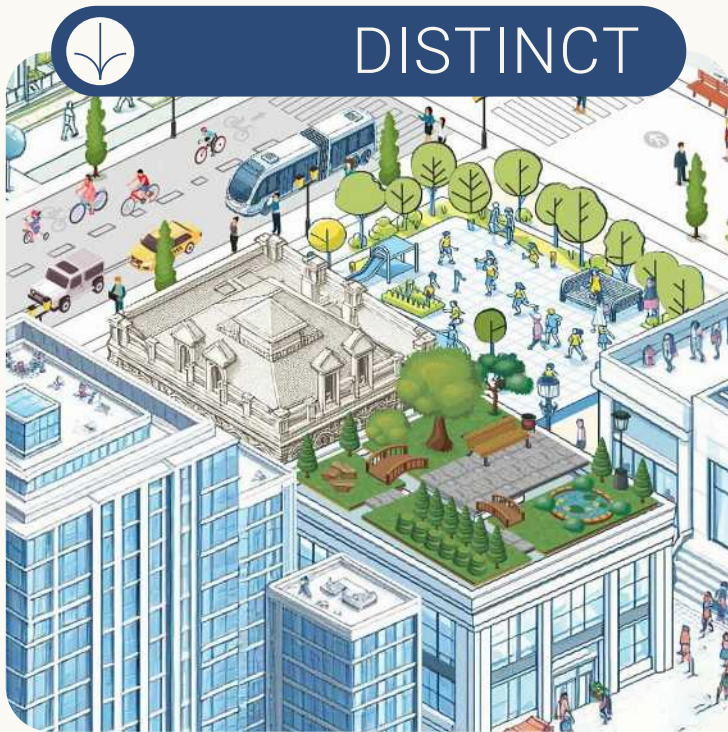
### Efficient Public Transport Networks and Infrastructure

Efficient public transportation networks and infrastructure support active mobility, alleviate traffic congestion and enable workers and visitors to access and commute around the district with ease.

### Multi-Modal Transport Options

Multi-modal transport options in the CBD provide flexibility and choice for commuters, and promote inclusivity by catering to the diverse needs of people. Furthermore, integrating various transport modes and transit-oriented developments can help to lessen the demand for private transport mode share and encourage active mobility.





Cities adopting polycentric approaches (multiple CBDs or 'nodes') should seek to **differentiate between each district**, by emphasising the unique characteristics of each cluster. This supports healthy competition, while positioning each node as an attractive locality for stakeholders.

### Tapping on Local Assets

By nurturing synergy with the existing regional and local characteristics of the area, businesses can capitalise on surrounding resources, infrastructure and talent pools to cultivate a bustling ecosystem of economic activity based on collaboration and innovation.

### Key Strategic Business Anchors

Focusing on different business sectors based on the unique characteristics of each city helps to strengthen the distinctiveness of each node and support healthy competition.

### Strong and Differentiated Cultural Identity

CBDs often serve as the economic and social heart of the city. By embracing elements of local art, history and culture, CBDs can preserve and promote their cultural identity as well as showcase the unique character and spirit of their communities, enrich the overall experience and distinctive-ness of their district, and stimulate economic growth.

→ Connected



Inclusive



Vibrant



Resilient



As CBDs evolve and stakeholder profiles change, there needs to be a good range of affordable and accessible uses that can **accommodate the diverse needs** of stakeholders.

### Mixed Use

Injecting and integrating diverse uses, such as housing and recreation to support businesses and the community in CBDs, can help districts to become more attractive and inclusive to a wider range of people, and foster a dynamic environment where people can live, work and play in proximity.

### Accessible and Meaningful Public Spaces

Providing meaningful and accessible public spaces in CBDs is crucial to improving the quality of the densely built environment, as it helps to foster social interactions and ensure the well-being of workers, residents and visitors alike. By creating well-designed and inclusive public spaces, CBDs can enhance the sense of belonging for residents while remaining attractive for businesses.

### Safeguard Affordability

Provision of affordable housing, commercial spaces and services is important for attracting a diverse mix of workers, residents and visitors to the CBD. It also ensures that the district remains inclusive and vibrant as an urban destination.

Connected

Distinct

←

Vibrant

Resilient



To remain attractive, CBDs need to be dynamic and cater to the evolving needs of businesses and lifestyles. They should be **attractive and vibrant urban destinations**, offering a good mix of activities that extend beyond work functions.

### 24/7 Economy

Investing in the night-time economy and other uses (apart from commercial) can help to increase vibrancy in CBDs beyond office hours. Fostering an economy that includes after-work hours and weekends is important to ensuring that CBDs remain attractive and economically competitive.

### Activated Streets and Public Spaces

Well-designed active streets and public spaces serve as focal points for gatherings, events and recreational activities. It encourages foot traffic and creates memorable experiences that contribute to the overall attractiveness of a CBD. Investing in the design, maintenance and activation of these spaces is therefore crucial for ensuring the sustainability of CBDs as vibrant urban destinations.

### Placemaking and Strong Local Identity

Placemaking initiatives activate underutilised spaces within CBDs, transforming them into lively hubs of activity and interaction. Public and private sector partnerships are key enablers as they contribute to the economic vitality of the area by supporting local businesses and attracting visitors, while fostering a sense of ownership and stewardship among stakeholders. Such initiatives can also help to strengthen the local identity of the place.

Connected

Distinct

Inclusive

Resilient

Resilient





The ability of CBDs to **adapt and respond to changing needs** is critical to its relevance and resilience in an increasingly dynamic landscape. These include responses to changing climate, social demographics and demands.

### Repurposing Spaces and Buildings

Repurposing vacant, underutilised spaces and old buildings allows for new life to be injected into CBDs while conserving resources and optimising land use. It can foster economic resilience by unlocking new business opportunities and encourage social resilience by preserving architectural heritage and a sense of familiarity.

### Flexible and Adaptable Spaces

Having spaces that are flexible and adaptable towards accommodating diverse uses can raise the competitive edge of CBDs. Such spaces increase the district's ability to respond to demands that arise from the evolving roles and expectations of CBDs as urban destinations.

### Sustainable and High-Quality Buildings

Investing in high quality and sustainable net-zero buildings will not only help to improve the resilience of the city to the impacts of climate change but also enhance the CBD's desirability to investors and businesses that are looking for low-carbon assets.

→ Connected

→ Distinct

→ Inclusive

→ Vibrant

←

## Actions – Case Studies

The following case studies are non-exhaustive examples of actions that the six cities are undertaking to achieve the range of aspirations for their CBDs.

24/7 Place  
Management

TOKYO



Central Sydney  
Precinct  
Redevelopment

SYDNEY



Dynamic Mixed-Use  
District to Live, Work  
and Play In

SINGAPORE



Extension to the CBD  
in Central: Kau Yi  
Chau Artificial Islands  
(KYCAI)

HONG KONG



Rejuvenating the  
Waterfront as an  
Urban Destination

HO CHI MINH  
CITY



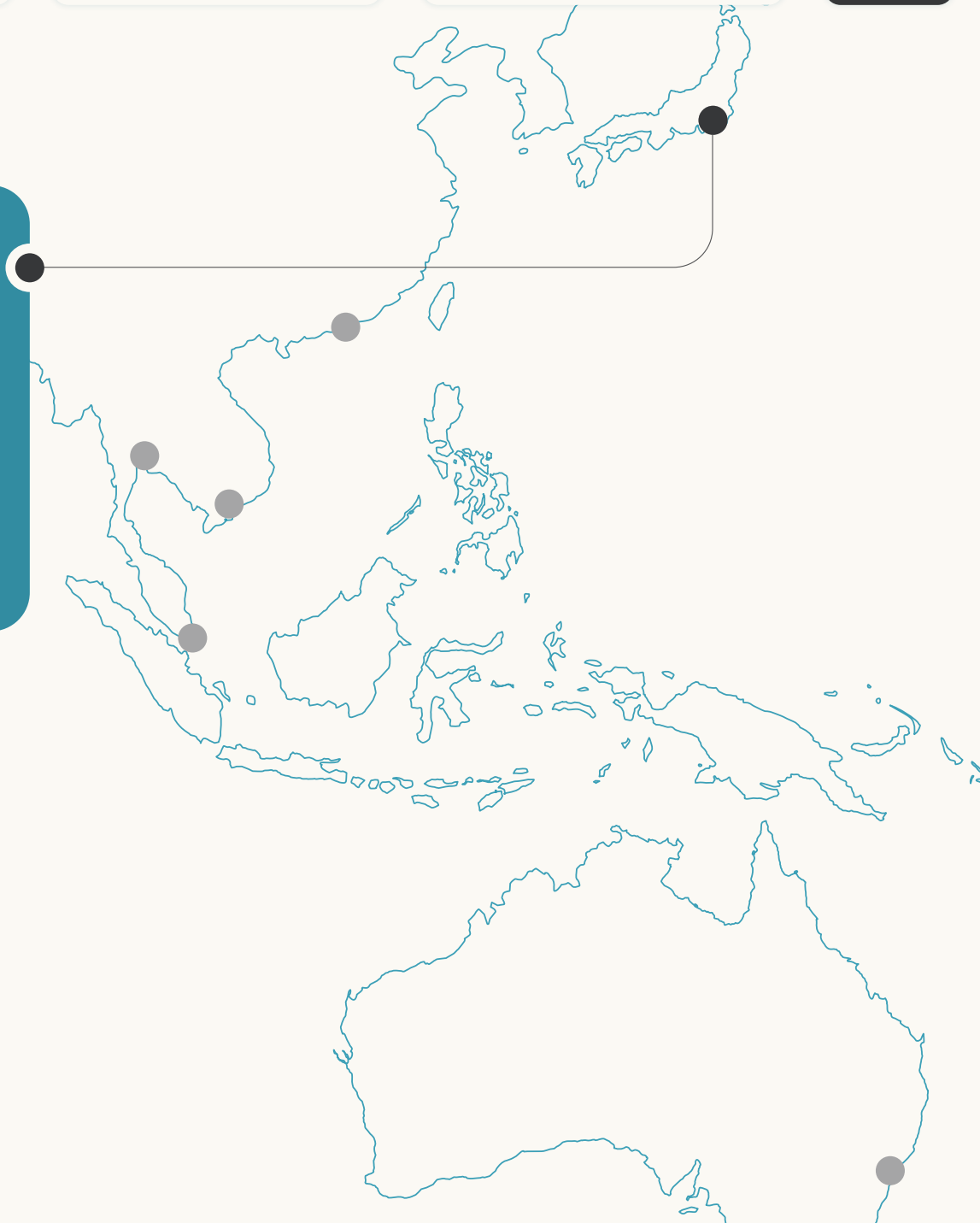
Integrated  
Developments –  
One Bangkok &  
Cloud 11

BANGKOK



# 24/7 Place Management

TOKYO



**CONNECTED**

Proximity to Transportation Networks

**Efficient PT Networks & Infrastructure**

Multi-Modal Transport Options

**DISTINCT**

**Tapping on Local Assets**

Key Strategic Business Anchors

Strong & Differentiated Cultural Identity

**INCLUSIVE**

Mixed Use

**Accessible & Meaningful Public Spaces**

Safeguard Affordability

**VIBRANT**

**24/7 Economy**

Activated Streets & Public Spaces

Placemaking & Strong Local Identity

**RESILIENT**

Repurposing Spaces & Buildings

**Flexible & Adaptable Spaces**

Sustainable & High-Quality Buildings

# Background

Tokyo is an exceptional case with multiple established CBDs across the city, including the Otemachi, Marunouchi and Yurakucho (OMY) district, Shibuya, as well as Roppongi and Toranomon. In response to socioeconomic changes, Tokyo has been undergoing renewal of its CBDs.

Besides redevelopment of buildings, revitalisation in Tokyo has largely been supported by place management or area management as it is known in Japan. In area management, local stakeholders from the private sector and community come together to drive initiatives to enhance the area where they live or work at, often through formal area management organisations.<sup>14</sup>

For instance, the OMY district which is located near Tokyo Station in the heart of the city was previously mono-use with domestic and foreign companies, but the last two decades saw large-scale rejuvenation with retail, hotel and civic uses being introduced into the area.<sup>15</sup> This was driven by major landowner, Mitsubishi Estate Co. Ltd, which also leads the OMY Area Management Association. Such organisations have helped to facilitate urban renewal by collaborating with partners to craft guidelines, organise events and improve infrastructure such as by boosting walkability.

In recent years, Tokyo has also been looking into growing their night-time economy to tap on its economic and social value. This initially started with revisions to the Entertainment Business Law in 2016 which allowed clubs to apply for 24-hour licenses.<sup>16</sup> In addition, grants were offered by the Tokyo Metropolitan Government (TMG) and the Tokyo Tourism Foundation in 2019 to reduce the financial burden on night-time businesses and events.<sup>17</sup> Momentum was ultimately impacted by the pandemic and work has been restarting on this front.

Revitalisation efforts have typically been constrained by legal and regulatory restrictions as well as the availability of supporting infrastructure and amenities. As we consider the issue of how CBDs tend to drop in buzz and energy after people leave the office, it will be helpful to look into Tokyo's experience of keeping their city and CBDs active 24/7.



↑ Naka-dori Avenue at Marunouchi is a pedestrian-friendly street / James Pere



↑ People gathered at public spaces around Tokyo Station / zauber2011

## Actions

The refresh of Tokyo's CBDs continues to be led by private developers that organise programmes and add public spaces and furniture to encourage use of the space even after dark. In the winter, Tokyo is also well known for its illumination events to light up the streets.

To further grow the night-time economy, the roundtable also discussed the need to extend the operating hours of Tokyo's public transportation. At the moment, trains typically stop at around 12 a.m., which can affect the feasibility of holding events or keeping businesses open past midnight. There is thus a need to engage private sector operators to come up with innovative solutions to match capacity and demand. Similarly, there needs to be a ready pool of staff available for various functions like retail, hospitality and security.

Some CBDs have also incorporated considerations for the night-time economy in their plans. The Advisory Committee on OMY Area Development, consisting of both the government and private sector, has drafted guidelines to shape upcoming changes to the district. Some of these include the addition of restaurants and entertainment facilities that MICE visitors can enjoy after hours as well as late-night express buses.<sup>18</sup>

The government also plays an important role in this process. Besides facilitating business-led initiatives, they also spearhead trials and events to not only attract and retain visitors, but also demonstrate the feasibility of such projects. For example, in February 2024, the Tokyo Metropolitan Government started permanent nightly projection mapping of artwork on Building No. 1 in Shinjuku to turn the civic infrastructure into a destination for tourists.<sup>19</sup>

At the national level, key stakeholders have also come together to form the Japan Nighttime Economy Association. Its aim is to lobby for more conducive legislation, support businesses and networking and raise awareness on what is required for a thriving night-time environment.<sup>20</sup>

Tokyo's strategies to cultivate their night-time economy exemplify how public-private partnerships can facilitate transformative change in our cities and CBDs.



↑ Projection of Godzilla on the Tokyo Metropolitan Government Building No. 1 / picture cells – Adobe Stock

### 1. Connected

While late-night transport services are available on certain days like New Year's Eve, more regular provision of longer public transportation operating hours can encourage people to spend more time in the CBD. Place management to enhance walkability can also ensure that the CBD remains accessible for all, including families with young children and seniors.

### 2. Distinct

Tokyo's CBDs are anchored by developers that have each identified unique visions. To illustrate, the OMY district made a goal to become a smart city in 2019. Their plan involves the collection and use of data to model various simulations to improve comfort and efficacy of the district, as well as to enable area management organisations to better design urban spaces for users (e.g. to enable seamless transfers at transportation nodes).<sup>21</sup> Other visions include a Vertical Garden City at Roppongi and Toranomom as well as an Entertainment City at Shibuya. This enables each polycentre to differentiate themselves from each other and meet the demands of their users and occupiers. Each CBD's approach to cultivating their night-time economy would further add to their distinctiveness.

### 3. Vibrant

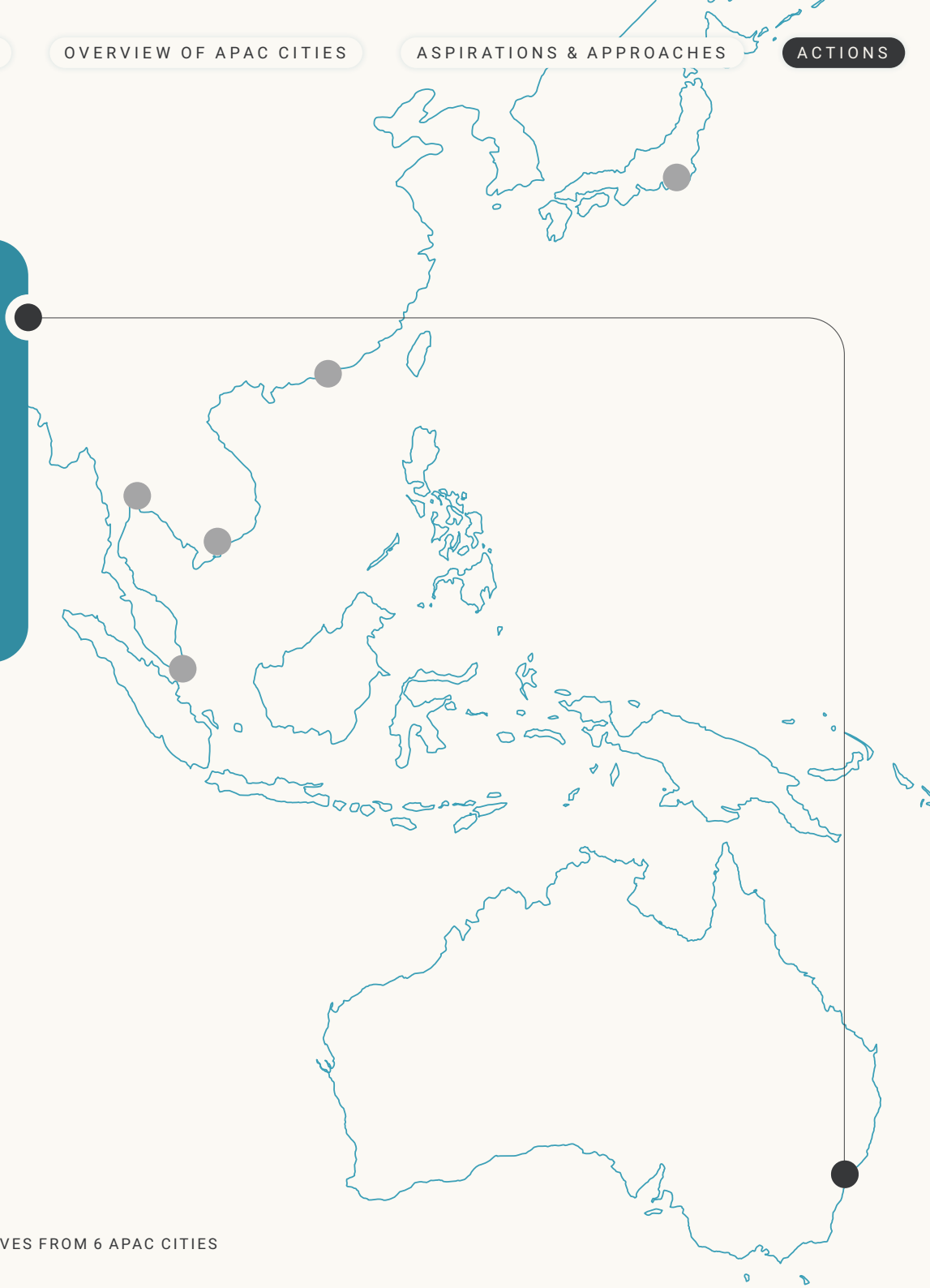
The city's plans to foster their night-time economy will help to keep the various CBDs vibrant from day to night. This is done through both hardware and software to create lively places that attract both workers and tourists. Tokyo's strong practice of area management which harnesses the strength of the private sector also contributes towards the success of these actions.



↑ Person taking photos of an illumination event at Roppongi / Leo Okuyama

# Central Sydney Precinct Redevelopment

SYDNEY



CONNECTED

- Proximity to Transportation Networks
- Efficient PT Networks & Infrastructure
- Multi-Modal Transport Options

DISTINCT

- Tapping on Local Assets
- Key Strategic Business Anchors
- Strong & Differentiated Cultural Identity

INCLUSIVE

- Mixed Use
- Accessible & Meaningful Public Spaces
- Safeguard Affordability

VIBRANT

- 24/7 Economy
- Activated Streets & Public Spaces
- Placemaking & Strong Local Identity

RESILIENT

- Repurposing Spaces & Buildings
- Flexible & Adaptable Spaces
- Sustainable & High-Quality Buildings

# Background

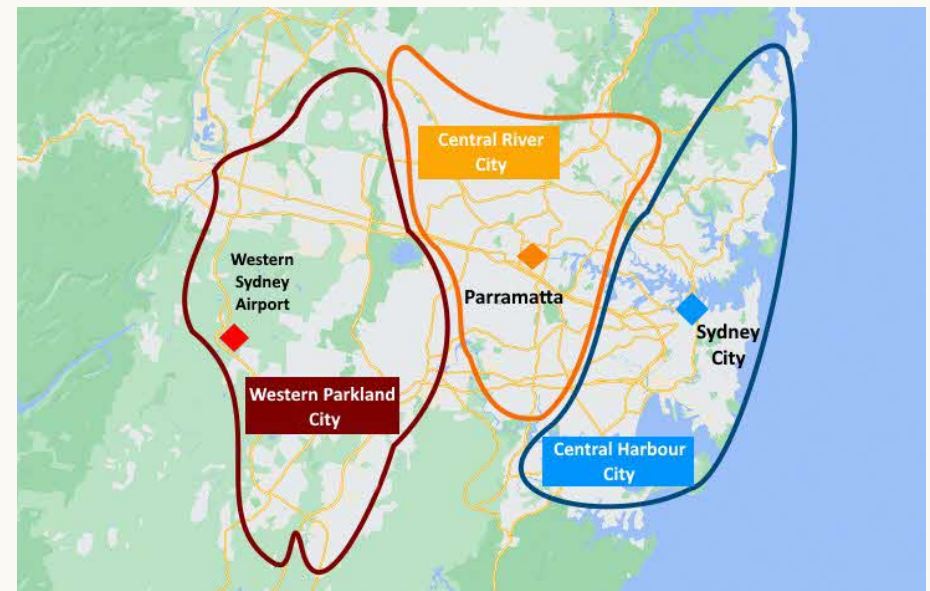
The City of Sydney is one of 32 local government areas in Sydney and accounted for about 7% of Australia's gross domestic product in 2022.<sup>22</sup> A significant part of this can be attributed to its CBD, made up of Harbour CBD, Chinatown and CBD South, which serves as a major economic hub. Within a small area of about 4.24 square kilometres, the area also houses many iconic attractions like the Sydney Opera House and Sydney Botanic Gardens.<sup>23</sup>

The Sydney CBD anchors the Eastern Harbour CBD which is part of a larger plan for a Metropolis of Three Cities within the Greater Sydney Region, alongside the Central River City and upcoming Western Parkland City. The Eastern Harbour City is expected to build upon its solidified reputation as a gateway for the region and also grow its innovation capabilities.<sup>24</sup>

Being bounded by waterfronts and green spaces on most ends, one of the few areas left for the Sydney CBD to expand and redevelop is at its southern end. This is where Central Station, which brings in people from various suburbs, cities, regions and states, is located.



↑ The Sydney CBD waterfront / Dan Freeman



↑ The Metropolis of Three Cities strategy / Adapted from the Greater Sydney Commission





↑ The Central Station is located at the southern tip of the Sydney CBD / Centre for Liveable Cities



↑ The Central Station's railway corridor currently acts as a stark divide between neighbouring suburbs / Taras Vyshnya – Adobe Stock

The area, also known as Central Precinct, is made up of around 24 hectares of government-owned land. In addition to its office and retail functions, the area also holds rich historical and cultural significance. In 2016, the New South Wales (NSW) government thus began to seek feedback from stakeholders on their visions for the site. Over the years, a Strategic Framework was also published together with regular engagement efforts to hear from the community.

Some of the challenges that face the Central Precinct include congestion and low dwell times by users, especially given its primary role as a transport interchange. It is also perceived as a less attractive location by commercial tenants, who tend to be drawn to areas close to the Harbour instead. The railway corridor further presents a hurdle to seamless connectivity in the area. Still, there is great opportunity to activate the space to realise its full potential.

# Actions

To meet the changing needs of its users, the reimagining of Sydney's Central Precinct encompasses a wide range of initiatives with a goal to become 'a vibrant and exciting place that unites a world-class interchange with innovative and diverse businesses and high-quality public spaces'.<sup>25</sup>

This is steered by a comprehensive Strategic Plan that has identified five key planning priorities, including:

- Place and destination
- People and community
- Mobility and access
- Economy and innovation
- Sustainability

In collaboration and consultation with various government groups, an urban design framework was also launched to guide development. Given the large scale of this project, this case study will focus on some of the ways the Central Precinct project is expected to help the CBD become more connected, distinct and inclusive.

## 1. Connected

Many transport lines around Sydney converge at Central Station. It is projected that the station will receive 450,000 commuters daily by 2040. Beyond improving the capacity for public transportation through rail and buses, the Central Station revitalisation plan also includes extended walking and cycling networks. Proposed open spaces over the station will help to connect the precinct with its nearby areas and restore pedestrian flow. The over station development will also have a deck that will be car-free and kept solely for pedestrian use. In addition, the precinct will explore the potential to include autonomous vehicle shuttles as a new mode of transport.



↑ Central Station is a key transport hub / MDRX (CC BY-SA 4.0 DEED)



↑ Views to the Clocktower will be safeguarded / Daniel Zador

## 2. Distinct

Over the past decade, across Australia, there has been a significant shift in how Australia's First Nations people and culture are reflected and represented in design and planning. The NSW Government has developed draft guidelines for Connecting with Country, which inform developments such as Central Station.

In addition, key heritage landmarks are also given prominence, with views to the Sydney Terminal Building and its iconic Clocktower, prioritised through sensitive planning of built form, even from new public spaces like Central Green.<sup>26</sup>

## 3. Inclusive

Affordable housing is a growing concern in Sydney, especially with rising costs of living. Hence, there is a goal to provide a range of housing options in the Central Precinct, such as student housing.

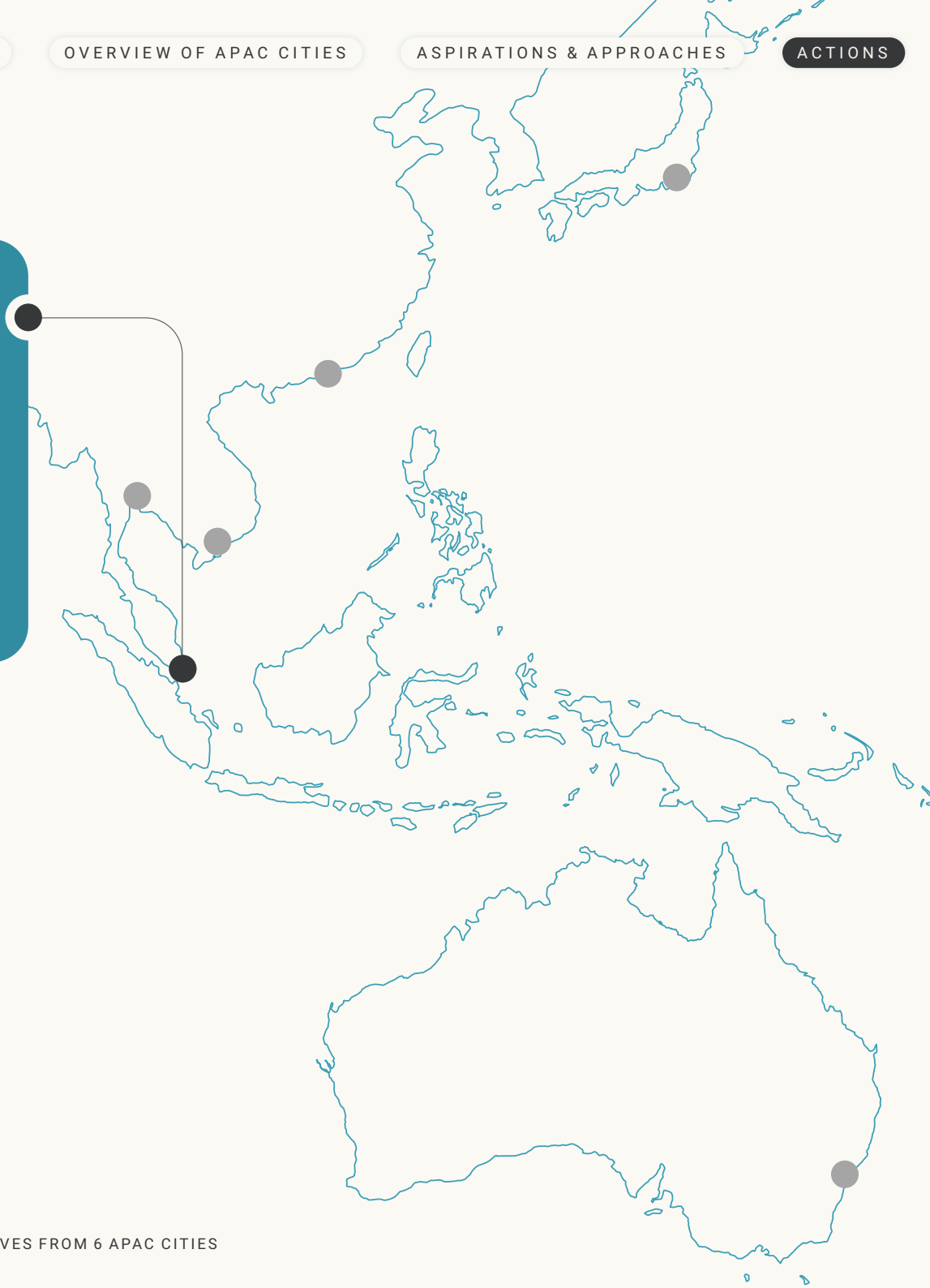
The overall indicative Master Plan has allocated about 82,000 square metres of Gross Floor Area for residential use, with about 30% earmarked for affordable housing. The latter is possible as the land is owned by the state. Some of the proposed affordable housing mechanisms include the provision of incentives (e.g. floor space bonuses) and selling of land parcels to the community housing sector at lower prices. Downstream, it is also recommended that the management of affordable housing be transferred to registered Community Housing Providers to streamline operations.<sup>27</sup>

The roundtable also talked about another perspective of inclusivity – ensuring that there are land use types to suit different aspects of the economic value chain such as businesses, industrial spaces and institutes of higher learning. One way this is done is through the development of Tech Central, an innovation district that focuses on areas like fintech, deep tech and creative industries, of which the Central Precinct is a key part of.

Through public and private investment, Tech Central is set to become one of Australia's largest innovation districts covering a total area of around 250,000 square metres. To attract emerging businesses like startups, about 50,000 square metres of this space will also be let out at lowered rental rates.<sup>28</sup> Anchor tenants like tech firm Atlassian have also been secured to further draw talent and investment into the district.

# Dynamic Mixed-Use District to Live, Work and Play In

SINGAPORE



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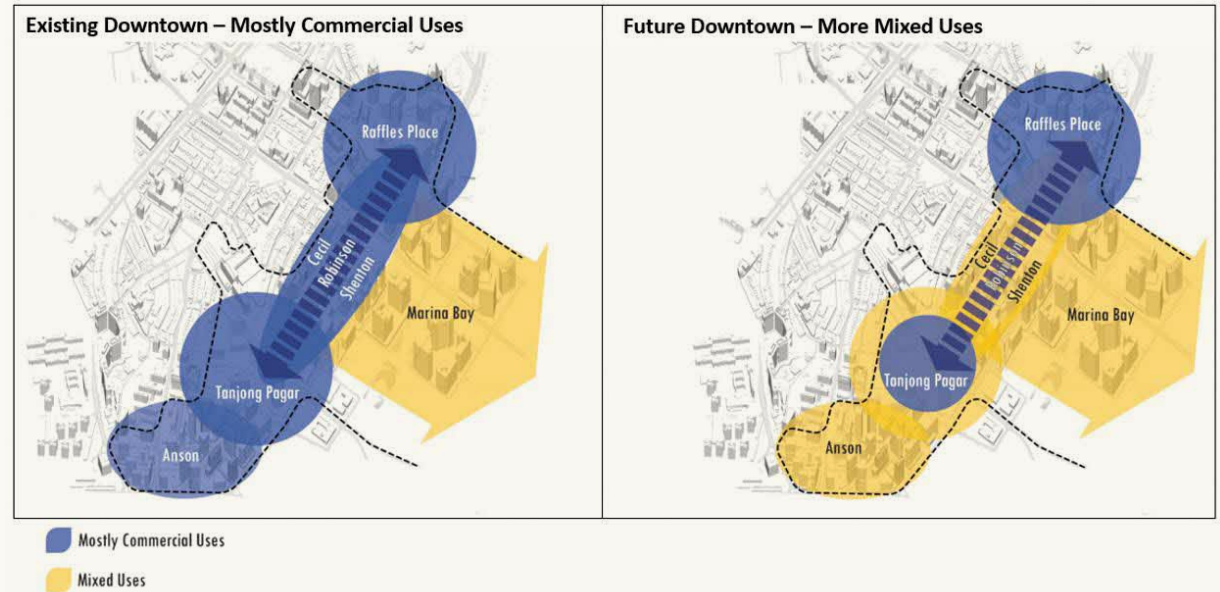
# Background

Singapore's CBD, which consists of Raffles Place, Robinson, Tanjong Pagar, Anson and Marina Bay areas, has always been the financial and commercial centre of Singapore. In recent years, the city has been moving away from a CBD that is dominated by offices, to one which is more mixed-use and lively after office hours. While Singapore adopts a polycentric approach to create a variety of job nodes that are closer to homes, the CBD continues to remain vital to anchor Singapore as an international business hub.

The city plans for the CBD to continue to evolve, accommodating a wider diversity of uses with enhanced public realms, so that it will not only be an attractive place for work, but also a vibrant place to live and play in. This will anchor its position as a dynamic 24/7 downtown and global financial hub.

# Actions

Active streets and public spaces provide essential urban relief, with space for office workers and residents to relax and unwind, as well as exciting programmes to add life and vibrancy to the CBD. Working with building owners, Singapore's CBD is introducing more public spaces with active programming by building owners and community groups.



↑ Plans for Downtown Singapore on Master Plan 2019 / Urban Redevelopment Authority

## Business Improvement District (BID)

The BID is a business-led and funded body formed to enhance the vibrancy and attractiveness of a defined area. It is a formal place management model commonly adopted overseas. Times Square Alliance in the United States and New West End Company in the United Kingdom are examples of established BIDs.<sup>29</sup>

In Singapore, a pilot BID programme was introduced in 2017 by the Urban Redevelopment Authority (URA) to assess the feasibility of the BID model and the possibility of enacting legislation in the future to formally empower the private sector to take ownership of their precincts. In the pilot BID programme, pilot BID precincts received matching seed funding from the Government for every dollar of membership fees collected from stakeholders to kick-start their collective stakeholder-led place management initiatives.

Singapore River One, Raffles Place Alliance and Discover Tanjong Pagar are three existing pilot BIDs in Singapore that are in the heart of the CBD.

## Benefits of BID include:

### 1. Enhanced Vibrancy

Pilot BIDs organise initiatives that offer unique experiences and inject buzz into the CBD beyond office hours. These initiatives help increase footfall and dwell time in the CBD.



← Fitness workouts at Raffles Place Park / Raffles Place Alliance

### 2. More Inclusive Communities

Pilot BIDs foster stronger communities by targeting diverse audiences beyond the working population and growing Corporate Social Responsibility as a collective culture.



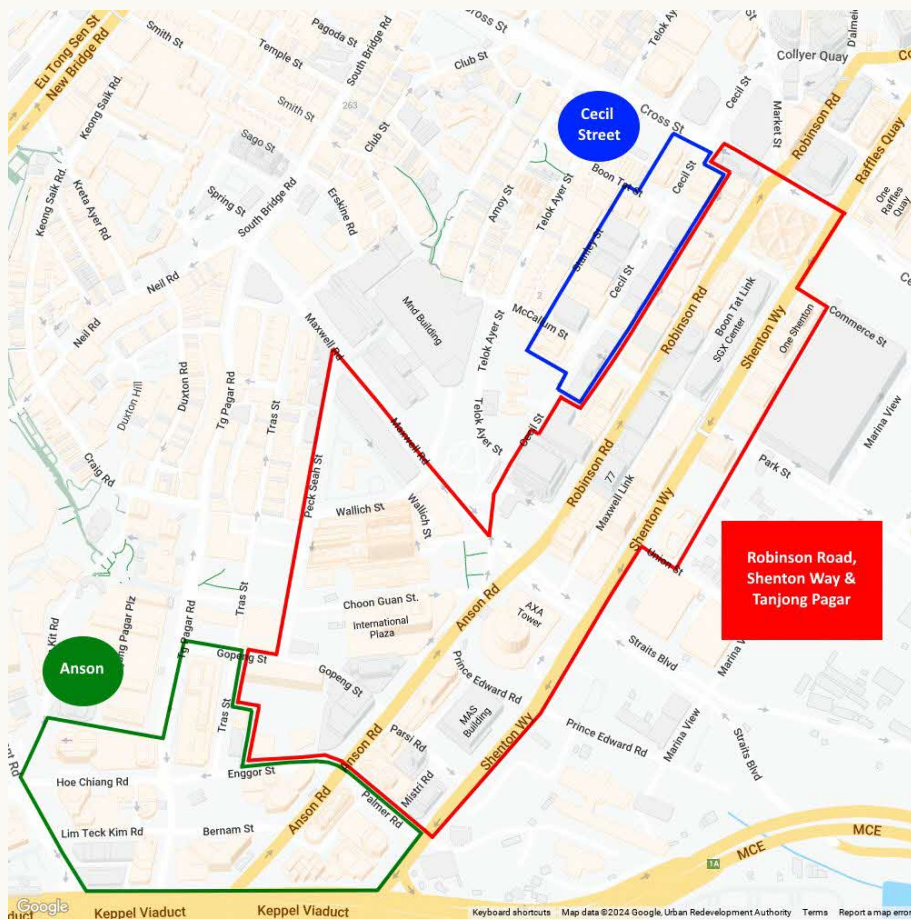
← Eco-playground at DTP Community Green / Discover Tanjong Pagar

### 3. Strengthened Resilience

Pilot BIDs bolster the resilience of the CBD by managing public assets and generating sources of revenue.



← New outdoor refreshment area along Boat Quay / Singapore River One



↑ CBDI Boundary / Adapted from Urban Redevelopment Authority

## CBD Incentive Scheme

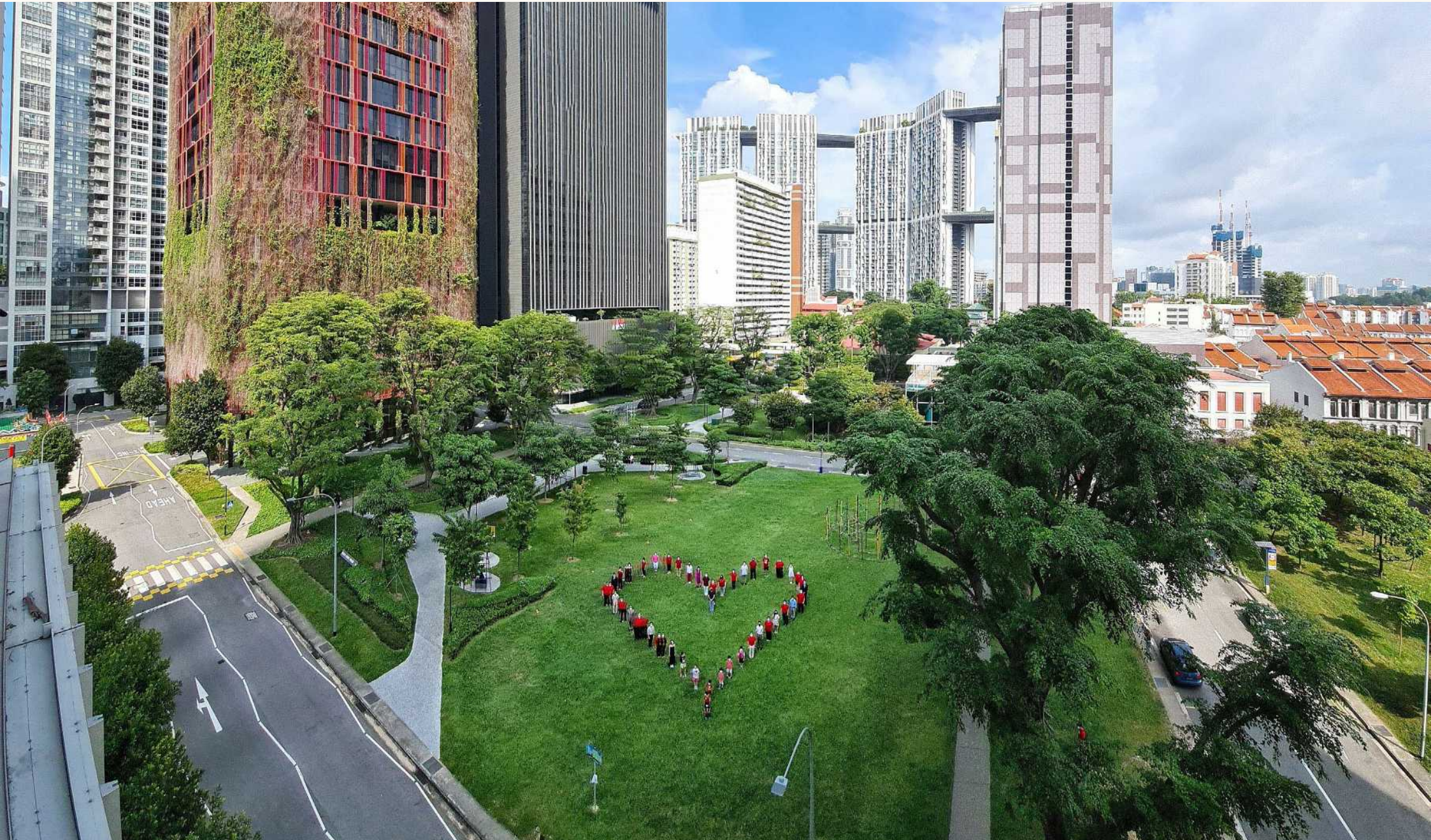
In recent years, Singapore's Urban Redevelopment Authority (URA) has continued to build on its efforts to shape the CBD into a mixed-use district.

To support these plans, the URA introduced the CBD Incentive Scheme (CBDI) in March 2019 to promote the redevelopment of ageing buildings in selected parts of the CBD. The purpose of the scheme is to increase the live-in population and introduce a greater amenity mix to rejuvenate the CBD. The CBDI encourages predominantly office developments to be converted into mixed-use developments that integrate commercial uses with a greater mix of residential, service apartments, and/or hotel uses that will bring more people to the CBD.

The scheme is only applicable to developments in three areas within the CBD, all of which were first developed in the late 1960s and 1970s, including through the Sale of Sites programme: (i) Anson, (ii) Robinson Road, Shenton Way and Tanjong Pagar, and (iii) Cecil Street. Additionally, eligible developments must be at least 20 years old and meet the minimum site area requirements of 1,000 square metres (for sites in Anson and corner sites in Cecil Street) or 2,000 square metres (for all other sites).<sup>30</sup>

Successful applicants are allowed to intensify the use of their land by up to 25% or 30% of the allowable plot ratio, depending on the location and proposed land use. Building owners and developers who apply for the scheme must ensure that proposed development plans comply with existing urban design and planning guidelines. There is also a requirement that the completed developments meet high standards of sustainability, through achieving Platinum certification under the Building and Construction Authority's Green Mark scheme.

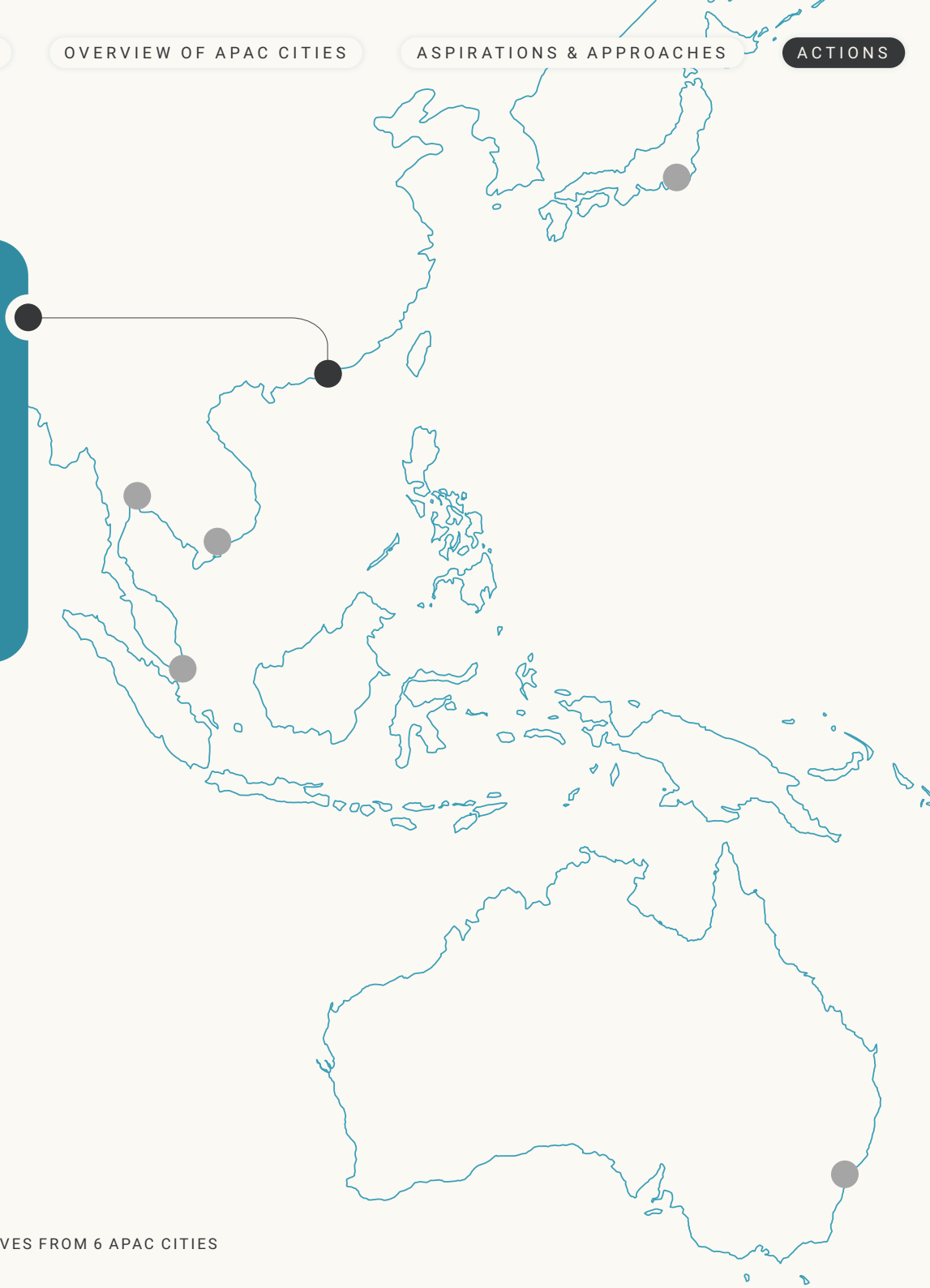
As of 2024, the scheme has received 15 applications, of which six have been granted planning permission by the URA. When completed, it is envisaged that these mixed-use developments would provide a wider diversity of uses, enable better connectivity and contribute to a more intimate and people-friendly CBD environment, that is not only a place to work but also a vibrant place to live and play in.





# Extension to the CBD in Central: Kau Yi Chau Artificial Islands (KYCAI)

HONG KONG



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# Background

In 2021, the Planning Department of the Government of the Hong Kong Special Administrative Region formulated a Conceptual Spatial Framework (the Framework) under a strategic planning study, 'Hong Kong 2030+: Towards a Planning Vision and Strategy Transcending 2030+' ('Hong Kong 2030+'). The Framework sought to meet various medium to long-term land demands in Hong Kong, in accordance with national initiatives including the National 14<sup>th</sup> Five-Year Plan and Outline Development Plan for the Guangdong-Hong Kong-Macao Greater Bay Area, promulgated by the Government of the People's Republic of China.<sup>31</sup>

Hong Kong 2030+ proposed the establishment of a 'Harbour Metropolis' in Hong Kong, in which the traditional CBD located in Central would continue to serve as the country's global financial centre, while Kowloon East would be transformed from a revitalised industrial district into a CBD to serve as a hub for emerging industries, SMEs and start-ups.<sup>32</sup> According to the Framework, KYCAI, which is located in a strategic position within the expanded Harbour Metropolis, can provide about 1,000 hectares of land for meeting part of the medium to long-term land requirements of Hong Kong.

With KYCAI's advantageous location – close to Hong Kong Island, it will serve as an extension to the traditional CBD in Central, providing an additional 100 hectares for commercial, residential, cultural, recreational and open space uses. It will become Hong Kong's future economic engine and promote Hong Kong as an international finance and trade centre, as well as a node for legal services. In consideration of the new generation of young people who aspire for work-life balance, the planning of KYCAI will adopt an innovative planning concept using urban design and a place-making approach to create a quality "Work-Live-Play" environment.

**Area:** Approx. 100 hectares

**Working Population:** 200,000

**Location:** Midway between CBD 1 and Lantau Island, where the airport and the 55-km Hong Kong-Zhuhai-Macao bridge are located



← Diagram map of Kau Yi Chau Artificial Islands / Planning Department of the Government of the Hong Kong Special Administrative Region



← Strategic connections between KYCAI and Hong Kong's Central CBD and Hong Kong International Airport / Planning Department of the Government of the Hong Kong Special Administrative Region

# Actions

## Proposed Initiatives for KYCAI:

### 1. To Enhance Connectivity

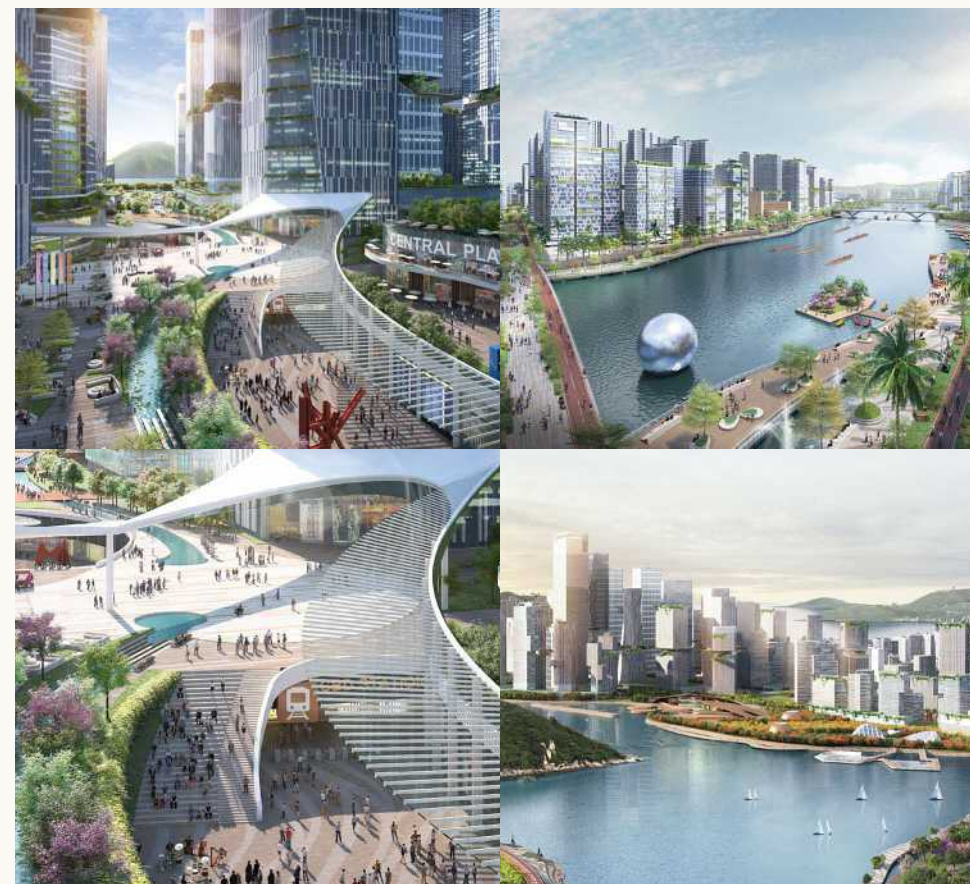
- New network of strategic transport infrastructure to improve Hong Kong's overall transportation network, and reinforce Lantau's edge as a 'Double Gateway' to the world and other Greater Bay Area cities
- Large-scale strategic transport interchange hubs with cross-boundary services to facilitate efficient intermodal change
- A green transport and mass transit system to connect neighbourhoods within the islands
- A car-lite zone with underground road infrastructure to free up above-ground space for pedestrian use

### 2. To Promote Inclusivity and Vibrancy

- Land set aside for housing, culture, creative arts, fashion, entertainment, sports and daily living facilities
- High-quality inter-generational public spaces to cater for different social groups

### 3. To Build Resilience

- Smart Green Resilience (SGR) city strategies, including 15-minute neighbourhood planning concept, building orientation based on prevailing wind directions, carbon emission reduction through the modular integrated construction (MiC) method, promotion of green buildings and urban forestry
- A comprehensive blue-green network to provide a variety of recreational and sports opportunities for people living and working on the islands, and enhance biodiversity with a diverse range of flora and fauna habitats
- Integrated SGR infrastructure system, incorporating renewable energy, district cooling systems, desalination plants, food waste sewage co-digestion facilities and common utility tunnels
- Smart and active mobility through pedestrian and cycle networks, as well as supporting facilities for electric and other energy vehicles<sup>33</sup>

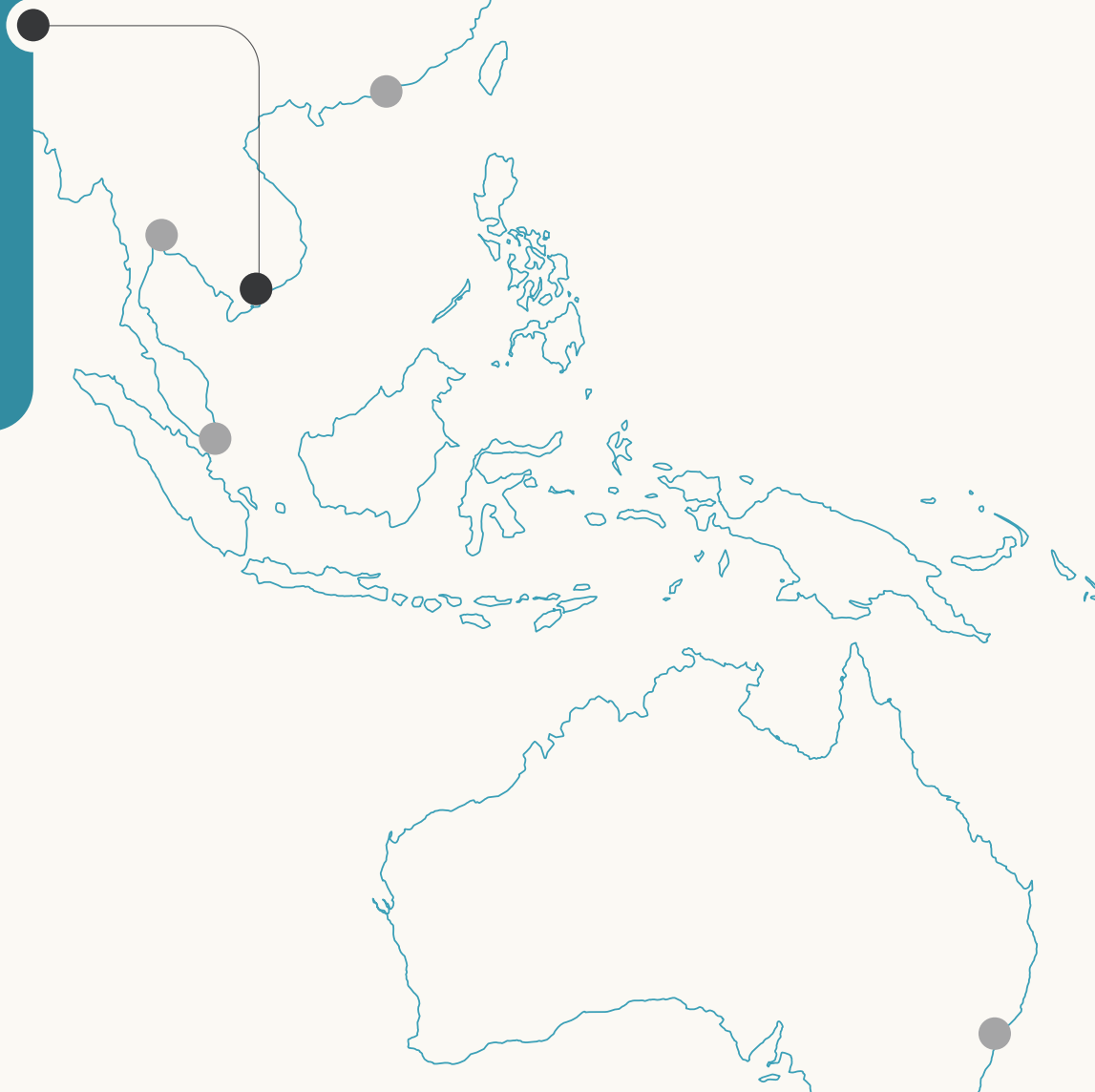


↑ Artist's impression of Kau Yi Chau Artificial Islands / Planning Department of the Government of the Hong Kong Special Administrative Region



# Rejuvenating the Waterfront as an Urban Destination

HO CHI MINH CITY



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## Background

As the most populous city in Vietnam, Ho Chi Minh City (HCMC) is known as the business and financial hub of Vietnam. The city's geography is fragmented by rivers and canals, including the Saigon River which meanders through the city. District 1, which is located to the west of Saigon River, has historically been the financial and commercial hub of HCMC. To address the growing demand for more mixed-use and public realms while alleviating pressure off District 1, the city has started expanding its CBD into the adjoining neighbourhoods such as District 3 and 4. To ensure the CBD remains attractive and competitive, the city is also looking at creating new CBDs.

Thu Duc City, which includes Thu Thiem New Urban Area, is an example of a new and upcoming innovation district consisting of six innovation hubs<sup>34</sup>. Thu Duc City is envisioned to become HCMC's technology, finance and service leader, with the nucleus of Thu Thiem urban area transforming into a new financial district and CBD for HCMC.

## Actions

In the past, port activities along Saigon River occupied prime waterfront land, resulting in an inwardly-focused community lacking connection to the water. The city is, today, reclaiming its waterfront space and enhancing connectivity both inland and across the waterways for a more accessible and inclusive CBD that doubles as an attractive urban destination for workers, residents and tourists alike.

### To revitalise the waterfront space:

- Existing walls and fences were removed to create a porous waterfront that connects to adjacent neighbourhoods. Nguyễn Huệ, Hàm Nghi and Lê Lợi are three important boulevards in District 1 that connect the CBD to the waterfront. Events are often curated on these streets and adjoining open spaces to add to the social-economic vibrancy of the CBD.
- Nestled in the heart of the CBD in District 1, Bach Dang Wharf Park stretches 1.3 kilometres along the banks of Saigon River and is a popular destination for locals and tourists. The park houses landmarks like the Thu Ngu flagpole which celebrates its port heritage. To further enhance the CBD's public realm, there are plans for the park to be extended to provide multifunctional open spaces, greenery and public facilities.
- The District 4 Old Port area has much potential for expanding the public realm and adding vibrancy to the CBD, such as through creative reuse of warehouses and port infrastructure to celebrate the site's industrial heritage. Existing examples include heritage buildings that have been repurposed as museums and a new waterfront plaza with a floating screen that was implemented as a flexible space to promote arts and culture events.



← Bach Dang Wharf Park / Ho Chi Minh City's Department of Planning and Architecture



← Illustration of Bach Dang Wharf Park's planned extension / Ho Chi Minh City's Department of Planning and Architecture



← Vibrant waterfront celebrating the city's heritage / Ho Chi Minh City's Department of Planning and Architecture

## To enhance connectivity and improve use of the water space:

1. The city has plans to take better advantage of its waterways. These water channels are valuable assets that add vibrancy to the waterfront spaces in the CBD and contribute to the blue economy (e.g. hosting of water sports events such as sailing competition and and dragon boat festival).
2. The city is also exploring different types of waterway public passenger transport systems to better serve urban passenger transport and tourism. This could help alleviate pressure off congested roads, boost blue economy and tourism and enhance connectivity of the city across the waterways.
3. Thu Thiem New Urban Area is planned as a new CBD for the City. To facilitate growth of the new CBD and attract more businesses and footfall, the city is working to enhance the connectivity between the two sides of the Saigon River. The City recently completed a Design Competition for a new pedestrian bridge to connect Thu Thiem to the existing CBD in District 1. Shaped as a nipa palm leaf, an iconic symbol of southern Vietnam, the bridge will feature a circulating waterfall and artistic lighting, thereby doubling up as a new landmark and attractive public space linking the two districts.



↑ Water sports events at District 1 / Ho Chi Minh City's Department of Planning and Architecture



↑ Water bus transport / Centre for Liveable Cities

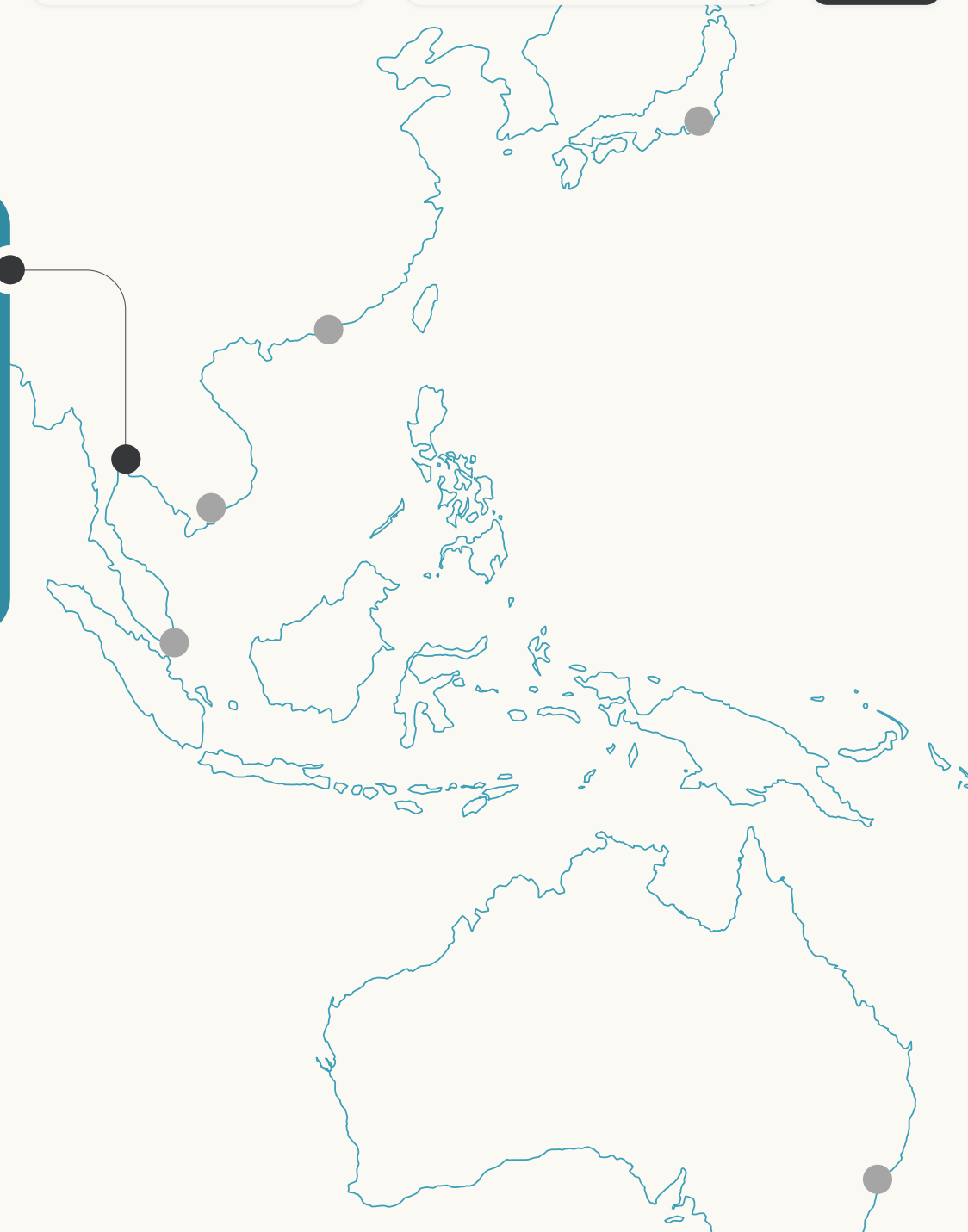
↑ Artist's impression of the new pedestrian bridge / Joint-venture of Chodai – Takashi Niwa Architects và Chodai Kiso – Jiban Việt Nam





# Integrated Developments – One Bangkok & Cloud 11

BANGKOK



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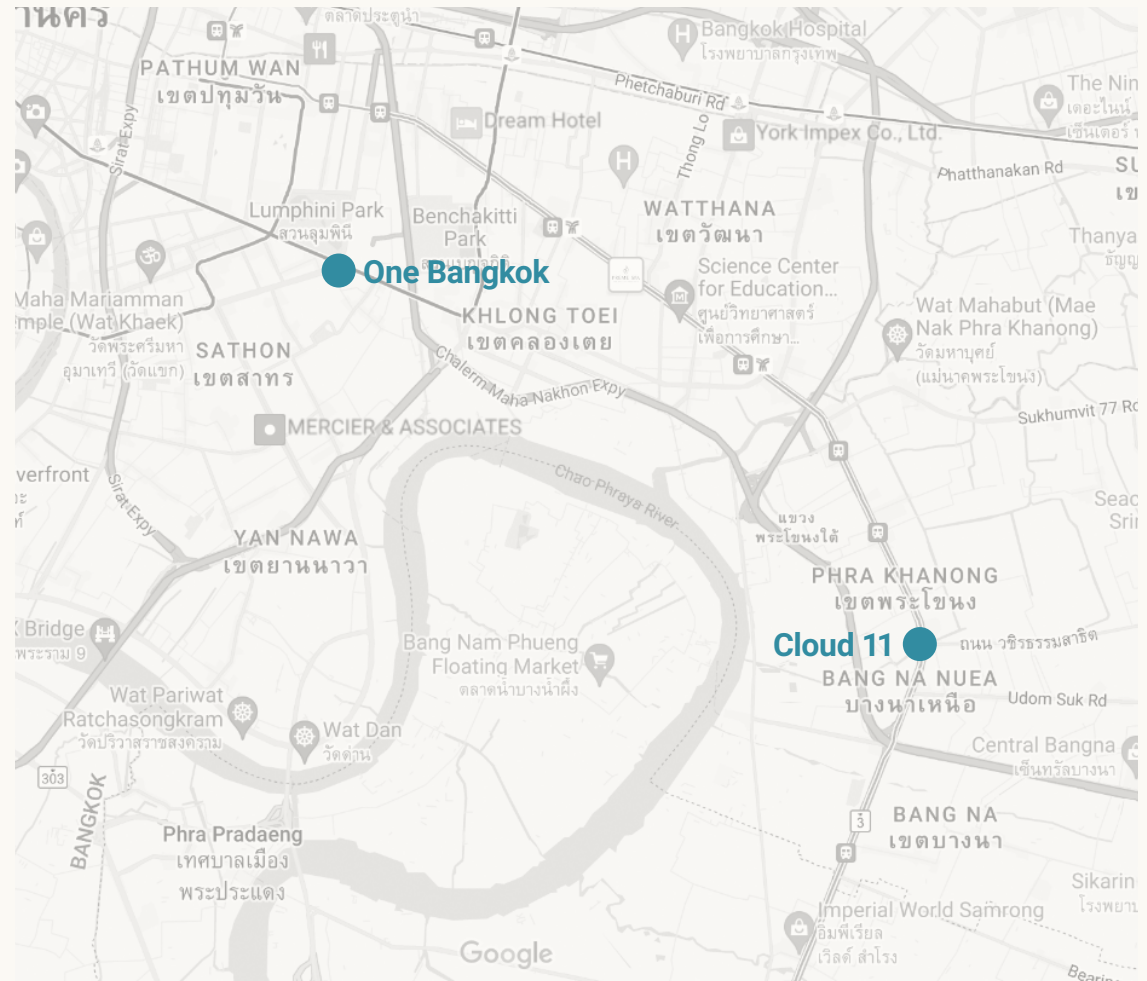
# Background

Historically, commercial activities in Bangkok were concentrated around the Chao Phraya River, Charoenkrung Road and Yaowarat (Chinatown). The introduction of the BTS Skytrain and MRT subway in 2004 led to rapid development and modernisation, shifting business activities to new commercial areas such as Silom, Sathorn, Lumpini, early Sukhumvit and Phayathai. These areas eventually became the anchors of Bangkok's city centre and CBD.

This rapid development has led to scarcity of land for new developments in these areas, driving up prices of prime plots and making it financially less feasible for new projects. This challenge is further compounded by rigid land-use policies and the complexities of repurposing existing buildings.<sup>35</sup> Additionally, Bangkok has also been experiencing shifts in the population's workforce profile and lifestyle preferences. Recent surveys highlighted that as Bangkok transitions to the digital age, workers may start to lean towards entrepreneurship and content creation – endeavours that align with personal values and provide income security. This new generation of workers may also seek greater job mobility and flexible work arrangements.<sup>36</sup>

## Actions

Against this backdrop emerged One Bangkok and Cloud 11 – two recent integrated developments that seek to redefine Bangkok's urban landscape by providing integrated mixed-use districts that take into account the needs and aspirations of future generations.



↑ Location of One Bangkok and Cloud 11 / Google Maps



↑ Overview of amenities at One Bangkok / Frasersproperty.com<sup>39</sup>

## One Bangkok

One Bangkok, comprises five office towers, three hotel/service apartment towers, interconnected retail podiums, art and cultural venues, eight hectares of plazas and landscaped green spaces.<sup>37,38</sup>

**Area:** 16.7 hectares

**Population:** Approx. 60,000 residents and workers

**Location:** Situated at the intersection of Rama IV Road and Wireless Road in Pathum Wan district, overlooking Lumpini Park. The site was previously occupied by Suan Lum Night Bazaar and the old Lumpini Boxing Stadium.

### 1. Supports Connectivity

To enhance connectivity with the other major regions in Bangkok, the development is directly connected to the MRT blue line at Lumpini Station through a network of direct underground links. Walkability is also a key emphasis in the masterplan: vehicular traffic access is located in a common underground infrastructure, thus freeing up land area across the district to support walkability with amenity-lined pedestrian streets and alleys. The district is connected to the nearby Lumpini Park, via a 40-metre wide continuous linear park.

### 2. Promotes Inclusivity

To promote social inclusivity, almost 50% of the land area at One Bangkok area is dedicated to public green and open spaces that support placemaking initiatives and enhance the area's vibrancy. This includes a 10,000 square metre landscaped civic plaza anticipated to be the venue for mass events and festivals.

### 3. Fosters Resilience

One Bangkok aims to set a benchmark for sustainable development in Thailand, in alignment with UN Sustainable Development Goals (SDGs). It incorporates numerous sustainability and design features, such as a centralised energy and water management system, and the use of recycled waste building materials in construction. Additionally, it is the first neighbourhood development in Thailand aiming for LEED Platinum certification.

## Cloud 11

Cloud 11 is another mixed-use development, which features seven key zones: office and studio space, hybrid retail (combining physical retail and digital services), smart hotel, lifestyle hotel, education, cultural and a central public space. One of the key aims of the project is to provide a place that empowers digital content creators in generating innovative digital content.<sup>40, 41, 42</sup>

**Area:** 25 hectares

**Location:** Situated at the CyberTech District of South Sukhumvit in Bangkok

### 1. Supports Connectivity and Accessibility

Cloud 11 is strategically positioned across a BTS Skytrain station, ensuring easy accessibility and connectivity to other regions of Bangkok. A central circulation spine is purposefully designed to support walkability and seamless connection between all the programmes within the development.

### 2. Fosters Inclusivity

The amenities were intentionally curated to cater to the needs of the new generation workforce, particularly digital content creators. This includes the design of spaces that support content creation, such as labs and studio spaces, as well as infrastructure that bridges physical and virtual realms, by connecting Thai content creators with global markets via Web 3.0, Metaverse and Blockchain technology.

### 3. Builds Resilience

To ensure flexibility and adaptability, the development incorporates a centralised logistic system, consisting of an automated warehouse, a central kitchen and a central distribution hub for deliveries and all loading infrastructure. The development is also designed to support climate resilience, by serving as a green urban lung that responds to existing environmental challenges in Bangkok, such as air pollution and lack of green spaces. This is achieved through the presence of a central green lawn with elevated gardens and a series of pocket parks for social activities. Additionally, the structure's courtyard openings are designed to optimise air flow through the vegetation, thereby improving air quality in the open spaces.



↑ Overview of Cloud 11 / Snøhetta, Photo by Mir<sup>41</sup>



↑ Elevated gardens and the Central Courtyard / Snøhetta, Photo by Mir<sup>41</sup>

# Discussion

Aspirations of the future CBDs were inextricably linked, and actions undertaken by cities to achieve one aspiration may in turn support another. As each city develops in consideration of its unique context, the overall approach and scale of the actions naturally differs from one CBD to another. Nevertheless, there are observed similarities in planning domains to consider when undertaking an action:

- 1. Geographical context and characteristics** – Planning with the local characteristics of the city in mind can help to enhance connectivity and bolster the city’s vibrancy and efforts to remain resilient. For instance, transportation planning in relation to the city’s geographical context can activate commuting modes unique to that context, thereby enhancing connectivity. Ho Chi Minh City and Hong Kong are exploring water-based transport modes for commuting to waterfront areas of the CBD, which, when fully implemented, can also help to activate these areas and enhance overall vibrancy. Additionally, to remain resilient, it is important for cities to understand its geographical constraints and develop mitigating strategies. In cities like Singapore and Hong Kong, planning agencies are innovating towards integrated developments with multiple functions to mitigate the scarcity of land area for new developments.
- 2. Evolving population demographics** – Incorporating emerging demographic shifts into the planning and design of the CBD can enhance the inclusivity of planning decisions, thereby fostering vibrancy. Cities like Tokyo and Sydney have begun curating activities to cater to a broader range of demographics, including families and tourists, particularly in terms of the night-time economy. This not only enhances inclusivity in the CBD but also expands its utility and functions, improving vibrancy beyond office hours. Additionally, cities experiencing a significant influx of tourists need to consider integrating different demographics, such as local communities and tourists. Failing to ensure inclusivity for local communities may lead to societal fragmentations, impacting the city’s efforts in fostering social resilience.
- 3. Support for public-private partnerships** – Amidst geopolitical and economic uncertainties, many cities have emphasised the need for stronger collaborations between public and private stakeholders. To support local and ground-up initiatives, planning agencies may consider enhancing flexibility in policies and planning legislations, as well as providing financial subsidies or cost offsets to support placemaking efforts. Creating a conducive environment for locally-driven initiatives can encourage private stakeholders to take ownership in developing public spaces, thereby enhancing the overall inclusivity and vibrancy of the CBD.
- 4. Affordability** – To mitigate high costs of living and the downstream implications of gentrification, new developments in the CBD should consider the potential impact on costs and safeguard affordability for residents. The absence of such consideration may lead to resistance from local communities, ultimately eroding the city’s social and economic resilience.
- 5. Local climate conditions** – Urban planning and design that are sensitive to local climate conditions can significantly contribute to the success of intended aspirations. For instance, to support walkability and pedestrian connectivity within the CBD, Singapore has implemented a large underground pedestrian network, complemented by above-ground sheltered walkways to allow users to walk between localities regardless of weather conditions. Understanding the nature and scale of disaster risks faced by each city is also crucial. This knowledge can help inform planning and design decisions, bolstering resilience against adverse climate events such as floods and earthquakes. Given that assets and infrastructure in the CBD are considerably expensive, it is essential to design them to withstand disaster events and support the CBD in recovering post-disaster, thereby enhancing the CBD’s economic resilience.

# Indicators

To track and evaluate the CBD's performance level vis-à-vis aspirations:

	QUANTITATIVE	QUALITATIVE
CONNECTED	<ul style="list-style-type: none"> <li>Density of public transport stops</li> <li>Modes of commute to the CBD</li> <li>Overall accessibility of the CBD area</li> <li>Travelling time between CBD: 1) from residential areas, 2) to airports, 3) to other significant infrastructure in the city (e.g. other CBDs)</li> <li>Cost of public transport commute to the CBD</li> </ul>	<ul style="list-style-type: none"> <li>Overall perceived accessibility of the CBD area</li> <li>Perceived travelling time between CBD to key nodes in the city</li> </ul>
DISTINCT	<ul style="list-style-type: none"> <li>No. of visitors/tourists to the area</li> <li>Perception survey – 1) understand people's sentiments and perceptions of their CBD, 2) significance and memory of places and icons in the CBD</li> </ul>	<ul style="list-style-type: none"> <li>Understand people's sentiments and perceptions of their CBD</li> <li>Significance and memory of places and icons in the CBD</li> </ul>
INCLUSIVE	<ul style="list-style-type: none"> <li>Established measures of walkability, affordability, safety and security</li> <li>No. of tourists frequenting the CBD</li> <li>Operating hours of places in the CBD</li> <li>No. of inclusive amenities for various demographics – e.g. families, people with pets</li> <li>Proxy measures of good mixed use – rental/resale prices, mobility patterns</li> </ul>	<ul style="list-style-type: none"> <li>Perceptions of walkability, accessibility, safety and security</li> <li>Overall friendliness of places in the CBD for different demographics – e.g. families, people with pets</li> </ul>
VIBRANT	<ul style="list-style-type: none"> <li>Footfall and dwell times</li> <li>Presence of ad-hoc events, festivals, art installations</li> <li>Facilities that integrate emergent trends and technological initiatives – e.g. esports</li> </ul>	<ul style="list-style-type: none"> <li>Satisfaction surveys – measuring levels of happiness</li> </ul>
RESILIENT	<ul style="list-style-type: none"> <li>No. and density of green and open spaces, public spaces</li> <li>Recovery time and extent of disruption during a disaster event – e.g. flood, storm</li> <li>Carbon footprint generated from new projects</li> <li>Level of green certification for buildings</li> <li>Investment – 1) to upgrade infrastructure against impact of climate change, 2) retrofit existing buildings to meet latest standards on energy performance</li> </ul>	

The six APAC cities also discussed the significance of indicators to assess the actions undertaken in the CBD, particularly to examine the CBD's level of attractiveness for investors, measure the city's resilience, and assess its ability to cope and recover during adverse situations. These indicators, shared by the cities, may be organised at varying scales – country level, city level, district level (or within the CBD) and individual level.

Besides being valuable for evaluating the city's competitiveness in comparison to other cities, these indicators can also serve as planning tools to help cities track their progress towards achieving its aspirations. These tools can be used to provide a baseline level for the CBD's performance, vis-à-vis the specified aspiration, and compared with a post-occupancy review after undertaking an action.<sup>43</sup>

# Conclusion

This report provides a comprehensive overview of the challenges encountered in the CBDs of six APAC cities, along with the corresponding actions undertaken by each city to shape the future of its CBD. Given the varying stages of development and contextual differences among these cities, the approaches and actions adopted by one may not be directly applicable to another in its current context. Yet, this inter-city research project presents a platform for mutual learning, as the issues faced by one city may be encountered by another in the future. In this regard, by distilling the key aspirations and approaches for future CBDs across the six APAC cities, this report serves as a practical comparative reference for each city. This is augmented by more nuanced discussions on local actions that also account for contextual differences, bridging between macro and micro planning considerations.

In today's hyperconnected world, the issues faced in the APAC region have been similarly observed in other regions, albeit at different scales.<sup>44</sup> While the report focuses on the future CBD from the perspective of six cities in the APAC region, the findings and discussion are also relevant to the broader conversation of how downtowns are continuing to evolve post-pandemic to meet the needs and aspirations of future generations. Accordingly, the relevance and impact of the findings from this report will be expanded to the global scale through a roundtable on the Future of Downtowns at the World Cities Summit 2024, which will be attended by both APAC and non-APAC cities. A short session report for that Roundtable will be appended to this document.

As cities explore greater decentralisation, such as through the 15-minute neighbourhood model, the insights from this study will also offer relevant ideas and guidance on planning and designing decentralised hubs that support better liveability for the population at large. After all, cities revolve around their people, and people will remain at the heart of our future districts and places.

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