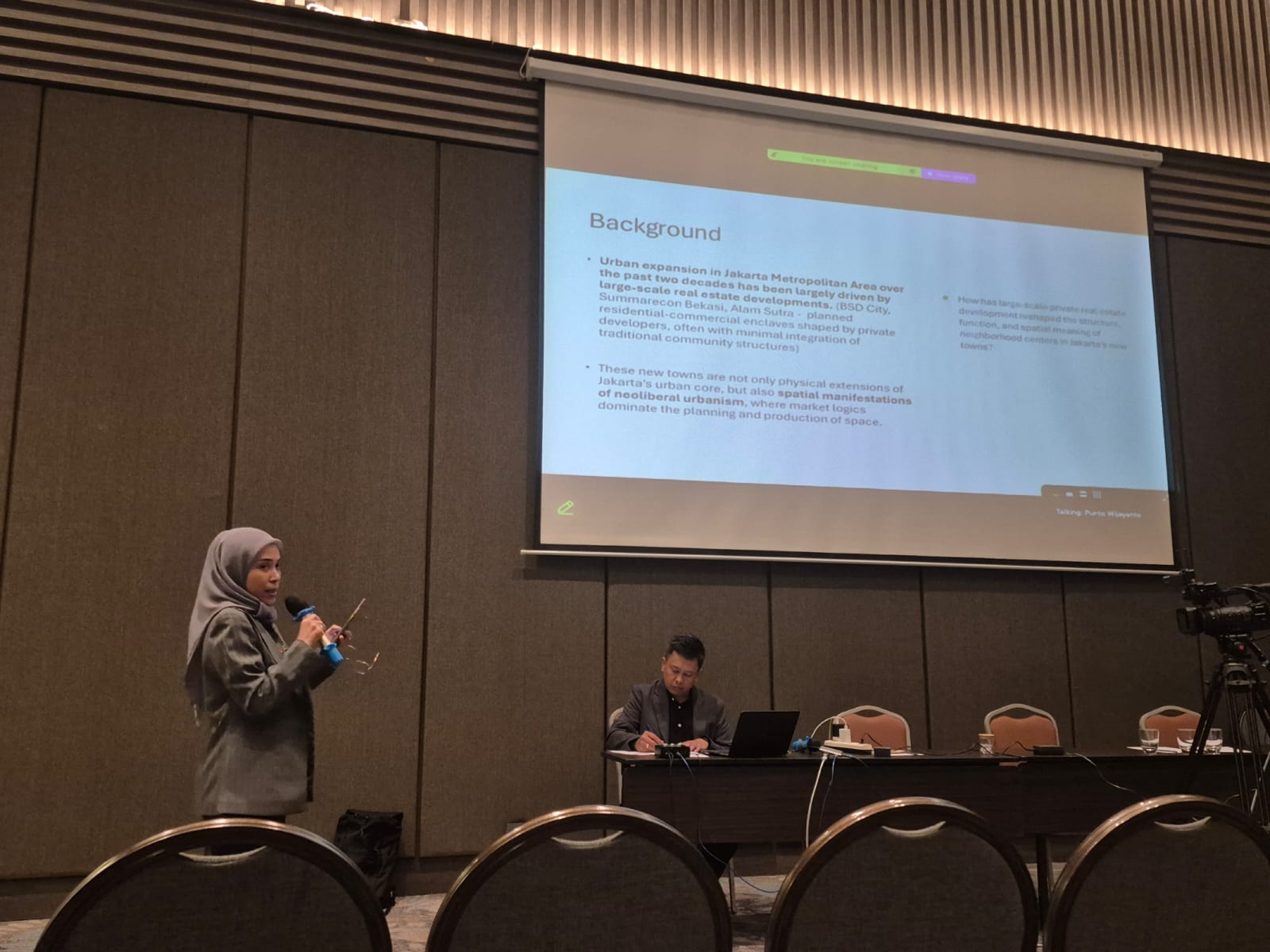

Background
Urban expansion in Jakarta Metropolitan Area over the past two decades has been largely driven by large-scale real estate developments. (BSD City, Summarecon Bekasi, Alam Sutra - planned residential-commercial enclaves shaped by private developers, often with minimal integration of traditional community structures)
These new towns are not only physical extensions of Jakarta's urban core, but also spatial manifestations of neoliberal urbanism, where market logics dominate the planning and production of space.

Rediscovering Large-Scale Real Estate Development With Small Neighbourhoods Centre's Yet So Irresistible

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Prepared for Is Livas
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Background

- **Urban expansion in Jakarta Metropolitan Area over the past two decades has been largely driven by large-scale real estate developments.** (BSD City, Summarecon Bekasi, Alam Sutra - planned residential-commercial enclaves shaped by private developers, often with minimal integration of traditional community structures)

- These new towns are not only physical extensions of Jakarta's urban core, but also **spatial manifestations of neoliberal urbanism**, where market logics dominate the planning and production of space.

- How has large-scale private real estate development reshaped the structure, function, and spatial meaning of neighborhood centers in Jakarta's new towns?

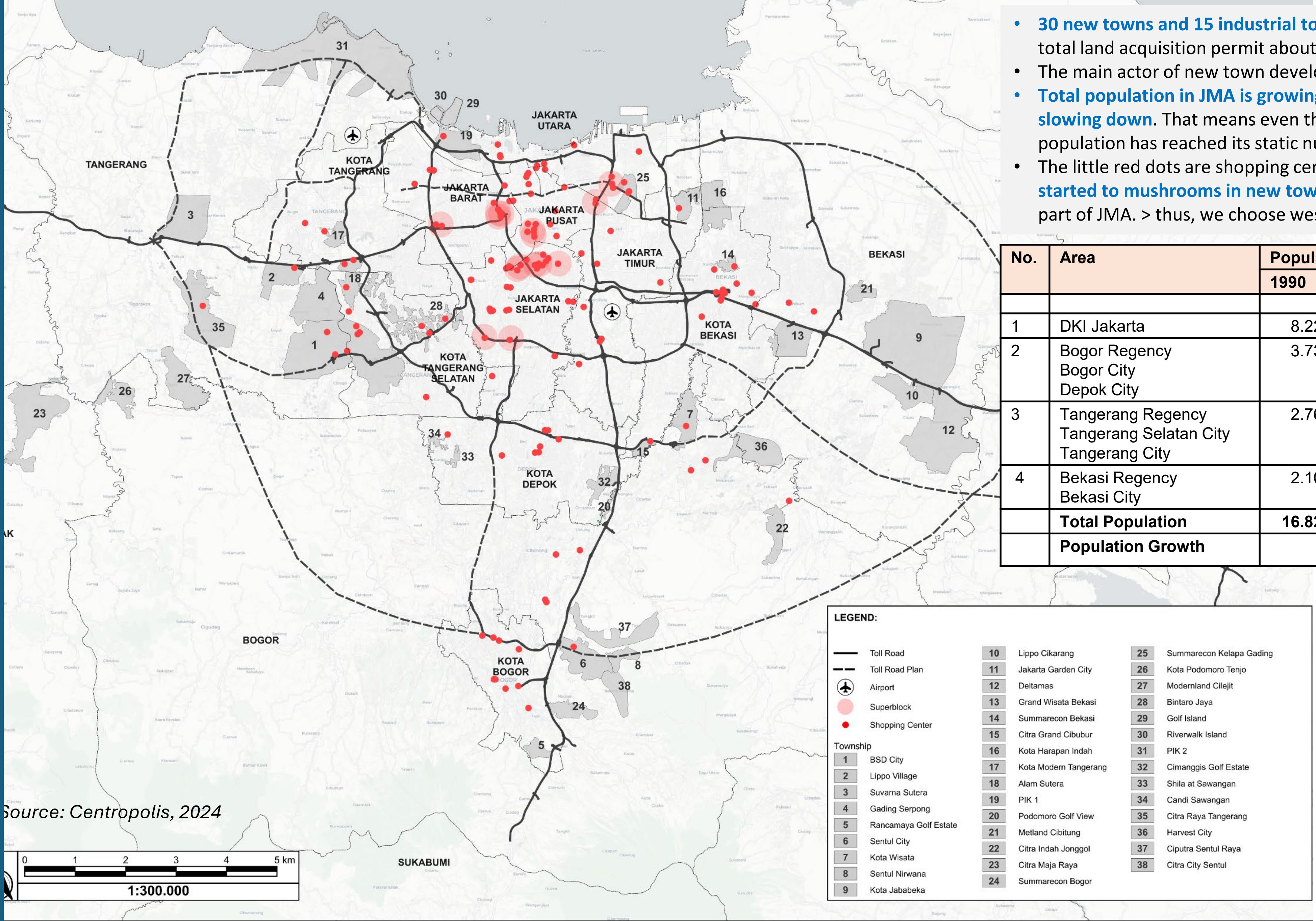
Why it is important to study

- Limited studies on the transformation of neighborhood centers in privatized new towns within rapidly growing metropolitan regions like the Jakarta Metropolitan Area (JMA) → understanding the evolution of micro-scale community spaces
- Underexplored role of private developers as major actors in shaping local-scale urban life and informal public services : Neighborhood centers are often seen merely as commercial spaces, not as emerging community hubs
- Scarcity of longitudinal studies: on how shifting lifestyle preferences, especially post-pandemic, are transforming the form and function of urban community centers.

Development of New Towns in JMA 2023-now

- **30 new towns and 15 industrial towns** has been developed in JMA, with total land acquisition permit about 85.000 Ha (1.3x land area of Jakarta)
- The main actor of new town developers are **national private companies**
- **Total population in JMA is growing, but the growth is decreasing and slowing down**. That means even though the new town is growing, but the population has reached its static number.
- The little red dots are shopping center or retail center. **The retail center are started to mushrooms in new town**, especially in **southern and western** part of JMA. > thus, we choose western part of JMA as case study.

No.	Area	Population			
		1990	2010	2020	2023
1	DKI Jakarta	8.222.500	9.588.198	10.562.088	10.672.010
2	Bogor Regency Bogor City Depok City	3.736.200	7.344.519	8.526.538	8.843.140
3	Tangerang Regency Tangerang Selatan City Tangerang City	2.765.000	5.804.963	6.495.455	6.704.834
4	Bekasi Regency Bekasi City	2.104.400	4.936.098	5.656.697	5.864.630
	Total Population	**16.828.100**	**27.674.178**	**31.240.778**	**32.084.614**
	Population Growth		**10.846.078**	**3.567.000**	**843.836**



Source: Centropolis, 2024

Development of New Towns in JMA 2023-now

No	Name	Location	Area (ha)	Year of Operation				
				1995	2001	2010	2015	2020
1	Bumi Serpong Damai	Tangerang	6.000	v	v	v	v	v
2	Kota Tiga Raksa	Tangerang	3.000	v	v	v	v	v
3	Bintaro Jaya	Tangerang	1.700	v	v	v	v	v
4	Citra Raya	Tangerang	1.000	v	v	v	v	v
5	Gading Serpong (split in 2004: Summarecon Gading Serpong and Paramount Serpong)	Tangerang	1.600	v	v	v	v	v
6	Kota Modern	Tangerang	770	v	x	x	x	x
7	Alam Sutera	Tangerang	700	v	v	v	v	v
8	Kota Puri Jaya	Tangerang	1.745	v	x	x	x	x
9	Lippo Karawaci	Tangerang	700	v	v	v	v	v
10	Pantai Indah Kapuk 2	Tangerang	2.650	x	x	x	x	v
11	Pantai Indah Kapuk	Jakarta	800	v	v	v	v	v
12	Reklamasi Pantura Jakarta	Jakarta	5.200	v	x	x	x	x
13	Pantai Modern	Jakarta	500	v	x	x	x	x
14	Jakarta Garden City *	Jakarta	270	x	x	v	v	v
15	Lippo Cikarang	Bekasi	3.000	v	v	v	v	v
16	Kota Legenda/Grand Wisata	Bekasi	2.000	v	v	v	v	v
17	Harapan Indah	Bekasi	700	v	v	v	v	v
18	Cikarang Baru	Bekasi	5.400	v	v	v	v	v
19	Delta Mas	Bekasi	3 000	-	v	v	v	v
20	Summarecon Bekasi *	Bekasi	240	-	-	v	v	v
21	Rancamaya	Bogor	550	v	x	x	x	x
22	Royal Sentul	Bogor	2.700	v	v	v	v	v
23	Banyu Buana	Bogor	500	v	x	x	x	x
24	Maharani Citra Pertiwi	Bogor	1.679	v	x	x	x	x
25	Bangunjaya Triperkasa	Bogor	500	v	x	x	x	x
26	Telaga Kahuripan	Bogor	500	v	v	x	x	x
27	Resor Danau Lido	Bogor	1.200	v	x	x	x	x
28	Kota Wisata	Bogor	460-750	v	v	v	v	v
29	Legenda Wisata	Bogor	750	x	v	v	v	v
30	Citra Grand *	Bogor	150	x	v	v	v	v
31	Bukit Jonggol Asri	Bogor	30 000	x	x	x	v	x
32	Harvest City	Bogor	1 050	x	x	v	v	v

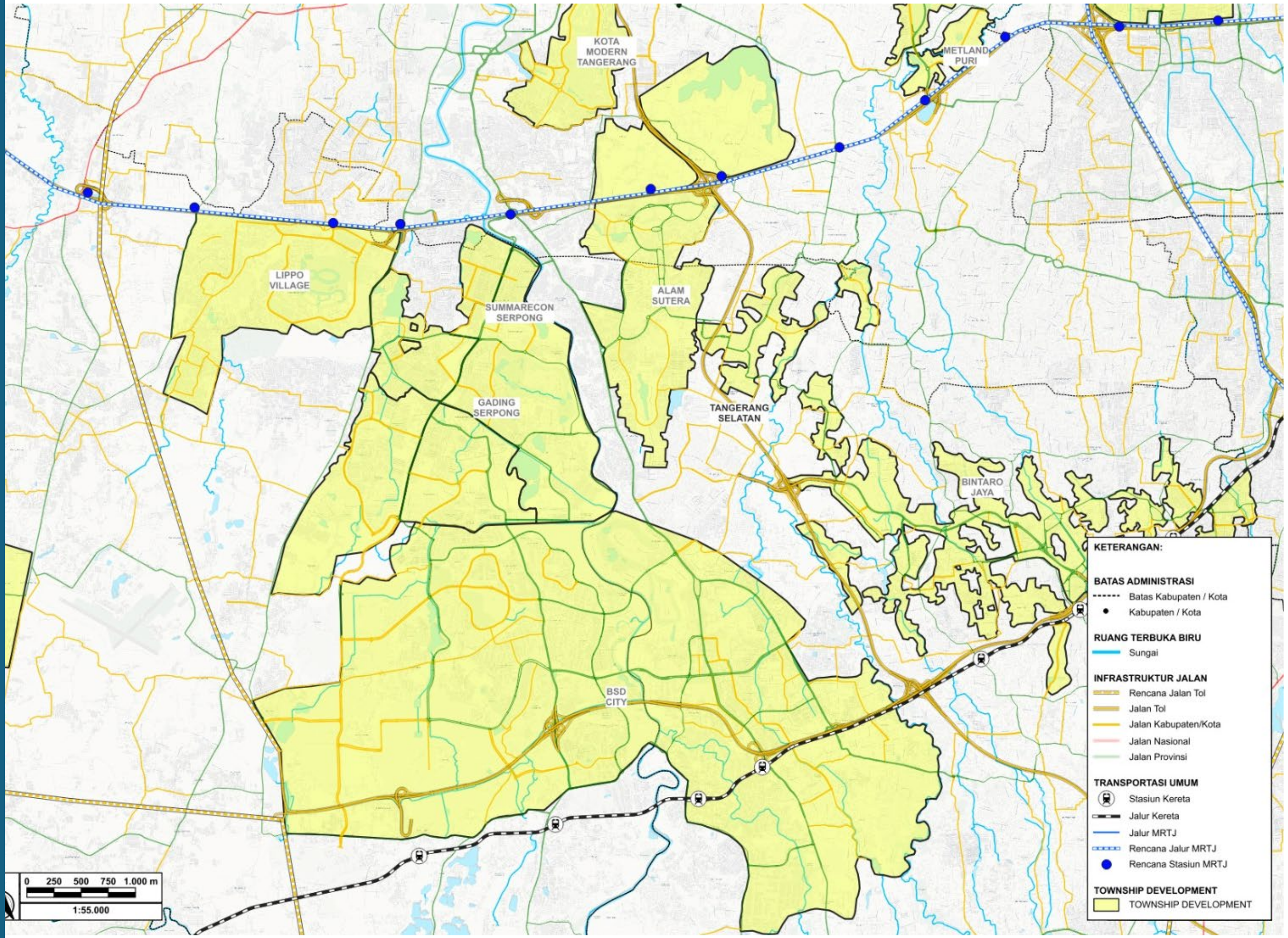
No.	Area	Population			New Towns in 2020		
		1990	2010	2020	Total area (ha)	Developed Area (ha)	Population (p)
						Est. 40%	Est.
1	DKI Jakarta	8.222.500	9.588.198	10.562.088	1.100	440	85.600
2	Bogor Regency Bogor City Depok City	3.736.200	7.344.519	8.526.538	5.250	2.100	420.000
3	Tangerang Regency Tangerang Selatan City Tangerang City	2.765.000	5.804.963	6.495.455	17.350	6.940	2.776.000
4	Bekasi Regency Bekasi City	2.104.400	4.936.0498	5.656.697	14.340	5.736	1.147.200
		16.828.100	27.674.178	31.240.778	38.010	15.204	4.428.800
			10.846.078	3.566.600			14%

- Developers has **land development permit between 500 ha to 6.000 ha** (except Jonggol – 30.000 ha)
- The type of development is dominated by **mixed landed house** (following Guidance for Proportional-Mixed Residential Development) and provided with **international standard of urban facilities** (commercial center, schools, religious buildings, CBDs) and alliance with global investors.
- It is estimated **only 14%** of the **population lives in New town**, where the rest are lived elsewhere.

Source: Firman (2010) and Centropolis Untar (2022)

**= less than 500 ha, but has the potential to develop into a new residential activity center*

New Town in Western Part of JMA



No.	Name of new town	BSD City	Alam Sutera	Gading Serpong	Lippo Village
1	Developer	PT. Sinarmas Land	PT. Alam Sutera Realty	PT. Summarecon Agung & Paramount Group	PT. Lippo Karawaci, bk
2	Land area	6.000 Ha	770 Ha	1.600 Ha	1.300 Ha
3	Developed land	3.200 Ha	550 Ha	1.100 Ha	1.200 Ha
4	Land Banking	2.800 Ha	220 Ha	500 Ha	100 Ha
5	Year start	1989	1993	1992	1990
6	Year of operation	1992	1994	1993	1993
7	Distance from Jakarta	30.5 Km	20.6 Km	22.6 Km	23.7 Km
8	Main function	Residential Urban Facilities (hospital, univ. school, mall)	Residential Urban Facilities (hospital, univ. school, mall)	Residential Urban Facilities (hospital, univ. school, mall)	Residential Urban Facilities (hospital, univ. school, mall)
9	Class	Middle upper and upper	Middle upper and upper	Middle upper	Middle up per and upper

- New town in western part of JMA consists of 6 new towns, but we only **focus on 4 major new towns** – BSD City, Alam Sutera, Gading Serpong (Summarecon & Paramount), and Lippo Village.
- All of those new towns **started in around the same year** of development, **having the same main functions**, and are **having a middle-upper and upper-class development segment.**

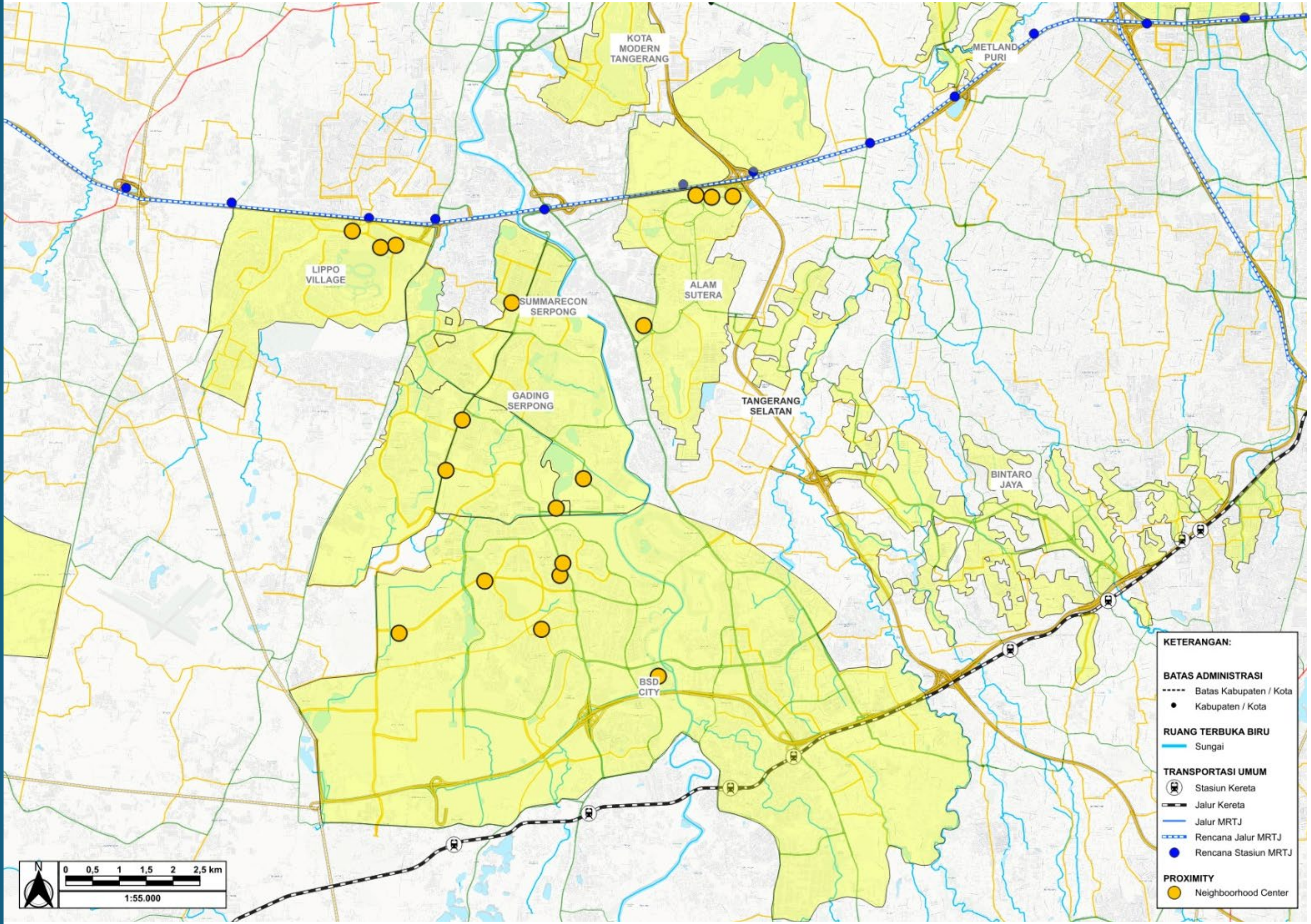
Commercial Facilities in New Town in Western Part of JMA

	Mal/Pasar		Hotel	Kantor
BSD City	***Neighborhood Center*** Giant Pasar Modern Eastvara Ararasa The Barn Quantis Clubhouse ***Community Center*** BSD Plaza BSD Junction BSD Square ITC BSD	***Theme/Festival Center*** The Breeze Mal Teraskota QBig ***Outlet Center*** BSD Autoparts	***3-Star Hotel*** Hotel Santika	***A Class*** Sunburst Office Park Green Office Park
Gading Serpong	***Neighborhood Center*** Pasar Modern Sinpasa Hampton Square Maggiore BEZ Walk ***Superregional Center*** Summarecon Mal Serpong 1 Summarecon Mal Serpong 2	***Theme/Festival Center*** Salsa Food City	***Budget Hotel*** Hotel Fave ***4-Star Hotel*** Hotel Aston	
Lippo Village	***Neighborhood Center*** Pasar tradisional Hypermart ***Superregional Center*** Supermal Karawaci	***Theme/Festival Center*** Benton Junction	***5-Star Hotel*** Hotel Aryaduta	***B Class*** Menara Asia ***C Class*** Kantor Dynaplast ***Office Park*** Cyber Office Park
Alam Sutera	***Neighborhood Center*** Makro (Lotte) Pasar 8 ***Superregional Center*** Mall @ Alam Sutera	***Power Center*** Living World IKEA Decathlon JPO ***Theme/Festival Center*** Flavor Bliss	***3-Star Hotel*** Hotel Mercure ***5-Star Hotel*** Tentrem Hotel	

- There are several types of commercial facilities developed in new town – shopping center, offices, hotels.
- Since 2010, hotels, offices, specialty store, convention-exhibition center, started to arise in new towns. > **indicate a transformation from dormitory town to self-contain/ independent town.**
- **The first type of retail facilities (1990-2010)** that occurred in new towns are shopping center (can be shaped as community center or neighborhood center).
- **Second type of retail facilities (2010-2020)** that occurred are regional scale shopping center with connection to global investor (AEON, IKEA, Decathlon).
- **Third type of retail facilities (2020-now)** that occurred are more into **neighborhood lifestyle shopping center**, more outdoor space and focuses on F&B tenants (see the red colored).

Source: Centropolis, 2025

Neighborhood Center in New Town in Western Part of JMA



- New type of retail in new town (for the past 5 years) is: neighborhood lifestyle shopping center.
- We analyse the reasons:
  - Pandemic – make a **shifting in lifestyle**
  - People **more comfortable to gather** (for arisan, meetup, informal meeting, etc) **at small commercial** – less hassle for parking, walking, etc.
  - A lot of new cafes or restaurants that **offer instagrammable design**.
  - **Shifting in generation** – dominated by Gen Y, Gen Z dan Gen Alpha > FOMO, YOLO, etc.
- The developer answer the shifting of lifestyle with **creating spaces with more intimate and good design, more open space and supported with international brands**.

Source: Centropolis, 2025

Neighborhood Center in New Town in Western Part of JMA

Alam Sutera				
	The Flavor Bliss	**IKEA**	**Decathlon**	**JPO (Jakarta Premium Outlet)**
website	https://www.theflavorbliss.com	https://www.ikea.co.id	https://www.decathlon.co.id	https://alamsuterarealty.co.id
Concept	Entertainment and culinary destination	power district	Power district	International premium brands
Year of operation	2010	2014	2017	2025
Total area	6,5 ha (land)	4,3 Ha (land) 3,5 Ha (building)	1 Ha (land)	7 ha (land) 80.000 m2 (building)
Program	The Plaza, Ring-O	Smaland	Playground and Experience Zone	
	Broadway (2020)	Click & collect		
Foreign Investor	APCA (Malaysia) Subway (USA) Starbucks (USA) Baskin Robins (USA)	Inter IKEA Group (Sweden)	Decathlon United (French)	Genting Simon Group (Malaysia)
Catchment area	regional	regional	regional	regional

Source: Centropolis, 2025

- **Alam Sutera** answers the shifting with creation of new commercial spaces which more focuses on **big box development** – power district commercial center and have a **regional catchment area**.
- Alam Sutera also **cooperates with foreign investors** to create the commercial spaces in the new town.

Neighborhood Center in New Town in Western Part of JMA

Gading Serpong & Paramount Land				
	Hampton Square	**Maggiore**	**BEZ Walk**	**Salsa Food City**
website	https://www.paramount-land.com	https://www.paramount-land.com/project/maggiore-signature	https://www.instagram.com/bez_walk/?hl=en	https://www.instagram.com/salsafoodcity/?hl=en
Concept	Semi Outdoor Mall	Street Gallery Open Corridor	Semi Outdoor Compound Retail	Outdoor food center
Year of operation	2024 (soft opening)	2024	2025	2004
Total area	2 ha (land) 15.463 m2 (building)	2,3 ha (land)	2,5 Ha (land)	2.600 m2 (land)
Program	Hampton Avenue Studio Loft	Maggiore Signature		Salsa stage
	Black Owl (dining & entertainment)	Maggiore Grande		
	Manhattan District (22 ha): regional commercial and business district	Maggiore Business Loft		
		Maggiore Junction		
Foreign Investor	Papaya Fresh Store (Japan) Daisho (Japan) Yoshinoya (Japan) Kaneka Corporation (Japan) Ikinari Steak (Japan) Little Red Dot (Singapore)	A&W (USA)	Starbucks (USA)	n.a.
Catchment area	Neighborhood	Neighborhood	Neighborhood	Neighborhood

Source: Centropolis, 2025

- **Gading Serpong – Summarecon & Paramount** answer the shifting with develop strip commercial area/district.
- Focuses on F&B tenants and they are not focus on big foreign investors but attract small-famous brand of F&B foreign investors.

Neighborhood Center in New Town in Western Part of JMA

Bumi Serpong Damai					
	The Breeze	**Q Big**	**The Barn**	**Eastvara**	**Ararasa**
website	https://thebreeze.bsdcity.com	https://qbigbsdcity.com	https://barnbsdcity.com	https://www.eastvara.com	
Concept	Mall without wall The First Open Air Lifestyle and Entertainment Center	Power Center Retail Complex	an open-air mall concept that combines modern barn-inspired design, surrounded by serene and lush natural scenery	a breath of fresh air in the world of commercial compounds.	*millenials & family*
Year of operation	2013	2016	2024	2024	2020
Total area	13,5 ha	17,5 ha (land)	1 ha (land)	4,8 (land) 23.0000 m2 (building) 1 0.0000 m2 (green space)	
Program	Kids and Family	Big Store	Grand Lucky	Urban Groove (Lifestyle and Fashion)	Temurasa Foodpark
	Koi Pond	Big Foodie	Restaurant	Spring Ville (Family)	Market City
	Ranch Market	Big Hobbies	Artisan café	The Light Atrium (Community Space)	
	Pharmacy	Big Excitement	Pop-up market	Sunset Boulevard	
Foreign Investor	Auntie Anne's (USA) % Arabica (Japan) Boost (Australia) Kaneka Corporation (Japan) Chatime (Taiwan) SaladStop! (Singapore) Dore (Japan) Subway (USA) Starbucks (USA) Gion Suhsi (Japan) Jitlada Group (Thailand) Marugame Udon (Japan) Old Town White Coffee (Malaysia) Wee Nam Kee (Singapore) Gold's Gym (USA)	Ashley furniture (USA) Ace Hardware (USA) Starbucks (USA) Chatime (Taiwan) Haagen Dazs (USA) KFC (USA) Gindaco (Japan) Chery (China) RELX (China)	Gion Suhsi (Japan) Kaneka Corporation (Japan) Pepper lunch (Japan)	Aeon Department Store (Japan)	Burger King (USA)
Catchment area	Regional	Regional	Neighborhood	Neighborhood	Neighborhood

- **BSD City** at first answers with creating **open-big box development** (Qbig and The Breeze) but after that changes its approach and started to create **small-unique-fancy commercial center > neighborhood scale** (Eastvara, The Barn, Ararasa, The Ranch).
- The new neighborhood center **developed in undeveloped land** > **soon to be residential area, but still under construction**.
- BSD City **collaborate with local investors** (Ranch Market, Grand Lucky, Market City) as anchor tenant and **combine it with small-specialized F&B global tenants** (Gion, Dore, Subway).

Source: Centropolis, 2025

Decade-Based Stages of Transformation

Period	Dominant Typology	Lifestyle Context
1980s–1990s	Enclosed Shopping Malls	Consumption-focused, car-oriented, status-led
2000s–2010s	Superregional Malls & Lifestyle Centers	Middle-class expansion, leisure & experience
Post-2015	Semi-Outdoor Community-Oriented Centers	Health-conscious, social interaction, walkability
Post-COVID (2020s)	Hybrid Public-Commercial Spaces	Open-air, flexible use, place attachment

From **closed and climate-controlled malls** → to **open, porous, walkable environments**
From **monofunctional retail use** → to **blended leisure, dining, wellness, and social spaces**
From **transaction-based interaction** → to **experience-based place-making**

Lifestyle-Driven Urbanism and Livable Space Creation

How Lifestyle Trends Shape Commercial Center Design

- **Health & Wellness:** Open-air concepts (e.g. The Breeze, Eastvara) respond to desire for nature, ventilation, and walkability.
- **Social Connectivity:** Spaces like Flavor Bliss or Salsa Food City promote gathering, events, and informal interactions.
- **Cultural Consumption:** Local and international branding mix becomes part of place identity and aspirational lifestyle.
- These centers **blur the line between private retail and public life**, becoming quasi-public urban commons.
- They enable **inclusive placemaking** when accessibility, programming, and design support diverse users and uses.
- They reflect a shift toward **experience-based urbanism**, where urban value is measured not only by function, but by atmosphere, comfort, and community.

Conclusion

- A Clear Shift in Urban Function: From Dormitory Towns to Integrated Urban Nodes : **urban functional shift**: from housing-focused to *service and community-focused development*.
- Evolving Role of Neighborhood Centers : auxiliary retail or convenience zones - **strategic hubs** within the urban structure of private cities (Economic, Social, Cultural, Environment)
- Developer-Led Urban Innovation and Adaptation: Growing **middle-class lifestyle demands, Health-conscious behaviors** post-COVID, Desire for **authentic public experiences** outside enclosed malls
- The Emergence of a New Typology: Semi-Outdoor Community-Oriented Commercial Spaces: Instead of traditional shopping malls, new town centers adopt → *Semi-outdoor design* (e.g., The Breeze, Flavor Bliss), *Community and destination-based programming* (e.g., The Barn, Maggiore), *Blended uses* integrating leisure, commerce, and social interaction.

- Neighborhood centers are becoming modern “third places”: informal public gathering spaces outside home (first place) and work (second place). Ray Oldenburg – “Third Place” (1989)

- Commercial spaces serve as arenas for identity-making, taste, and lifestyle expression—especially under neoliberal urbanism. Sharon Zukin – “Spaces of Consumption” (1998)

- *“Neighborhood centers in Jakarta’s new towns are not merely retail clusters, but evolving socio-spatial infrastructures that shape how communities live, connect, and grow in post-suburban urbanism.”*