

PRIVATE SECTOR-LED DEVELOPMENT AND HOUSING PROVISION – THE CASE OF SOUTH TANGERANG, INDONESIA

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ABSTRACT

In the last few decades, South Tangerang City has transformed into a supporting city for Jakarta. It has become a popular choice for professionals working in Jakarta who are looking for a more affordable and environmentally friendly residential option. The private sector has been a dominant actor in the housing construction in South Tangerang. The private sector constructs the vast majority of new housing, which is aimed at middle and upper-income households. The massive development of the private sector in many townships such as Bintaro, Alam Sutera, and BSD City has resulted in South Tangerang having good infrastructure of international standard. However, the private sector's massive land ownership causes significant problems for South Tangerang's city development. The study investigates the phenomenon through in-depth interviews with housing stakeholders, including local governments, private developers, and academics in South Tangerang. Land prices in Indonesia have caused affordability issues in South Tangerang. The study investigates how and at what cost this model of private-sector-led development affects housing provision in South Tangerang. This private-sector-led development may have contributed to the problem of rising land prices, making affordable housing difficult to build. Since 2013, no subsidized housing has been built in the South Tangerang area by a private developer because the land price makes it unfeasible. Besides, local government intervention is also



limited because the cost of acquiring land for infrastructure and housing development has become expensive. It raised the question of whether this development model, which has made the private sector the sole determinant of housing prices, can be sustained in the future.

Keywords: *Peri-urbanisation, South Tangerang, Private Sector-led Development, Housing*

INTRODUCTION

The Jakarta Metropolitan Area's (JMA) expansion has had an impact on the surrounding area. It is not surprising that the affordability of housing in JMA has become a major concern for many young households. House prices in Indonesia's major cities, particularly JMA, have risen dramatically in recent years. Affordability is a major issue for these young households, who work in many of the city's offices and commercial buildings (Rahmawati & Rukmana, 2022; Rukmana & Ramadhani, 2021; Tarigan, 2017). As a result of the housing affordability issue in DKI Jakarta, many young households working in the city center have sought housing in surrounding cities such as Bekasi, Tangerang, Depok, Bogor, and South Tangerang. Tangerang, and particularly South Tangerang, have become a popular choice for young professionals looking to buy a home because the area offers more alternative transportation access to the Jakarta city centre than other areas.

South Tangerang has seen massive development in the last twenty years as a result of large housing development by big private developers, most notably Bintaro Jaya (in Pondok Aren and Ciputat), BSD City (in Serpong and Setu), and Alam Sutera (in North Serpong). South Tangerang was administratively separated from Tangerang Regency in 2008, with a total area of 164.85 km². As a result of massive land conversions in Bodabek (Bogor, Tangerang, Bekasi) during the 1990s, land ownership concentration in the hands of a few large developers has caused land prices in the Jakarta Metropolitan Area to rise (Permanasari et al., 2024). South Tangerang has also seen significant increases in land prices in recent years (Rumah.com, 2021).



Figure 1. South Tangerang Location as Part of JMA

Source: Authors' analysis

The study sought to determine how the current urban development pattern in South Tangerang affects housing provision in the area. In recent decades, the private sector has emerged as the dominant actor in housing development in South Tangerang, and it is continuing to develop a large number of housing units for the market. The phenomenon of the private sector owning a large amount of land has been studied (Winarso et al., 2015), but the impact of this massive land ownership on the housing market in Greater Jakarta, specifically South Tangerang, has not been investigated. However, the private sector prioritizes profit over providing housing to the entire market. As a result, there are significant housing prices and limited choice in some housing segments. In addition, the impact on land prices and housing provision is one area that has yet to be thoroughly researched. This raises concerns about the long-term risk such as affordability and housing options especially for many first-time buyers in South Tangerang. This will become more difficult for them. Despite the importance of the issues for current housing provision, no specific policy exists to address this phenomenon; in fact, the government appears to be relying more and more on the private sector to provide housing for all income groups. Hence, this study investigates the relationship between housing provision and private sector-led development from the perspective of stakeholders in South Tangerang. The effect of massive land and housing development by private developers on housing provision has never been thoroughly studied. Thus, the perspectives of developers, local governments, and academics were investigated to gain a comprehensive picture of the problems. South

Tangerang was chosen as the case study due to its massive private sector-led development, with more than 60% of the area built and managed by the private sector.

LITERATURE REVIEW

The Rise of Private-sector-led Development and the Housing Shortage

After 78 years of independence, Indonesia still has a national housing shortage, with a steady increase in the housing backlog. Following the independence, the government initially prioritized agriculture, infrastructure, and industry development over housing. The housing sector was expected to improve in tandem with economic growth. When the government began focusing on housing provision in 1970, the problems of urbanization and population growth were massive, and it was too late to provide adequate housing (Tarigan, 2017). Due to a massive housing backlog and a lack of clarity in housing policy, Indonesian housing provision has historically prioritized quantity over quality. The Indonesian housing policy has also shifted to a more market-oriented approach, with the government serving as an "enabler" rather than a "provider." It is argued that direct government intervention, such as building social housing, is too risky and costly, and that the government should instead focus on building housing market. This new focus means that the private sector has become the dominant actor in housing production, while the government is focusing more on strengthening the financial sector in order to increase participation and capital investment in housing. In 2021, Indonesia's national housing backlog was estimated to be around 12,7 million units, with 600.000 - 800.000 units required to be built each year (BPS, 2021). In the last few decades, the private sector has already developed more housing than the government. For Instance, in 2018, the private sector built approximately 447.364 units, while the government built 161.299 units (Kompas.com, 2018).

Besides, the involvement in housing production by government has been limited to the lowest income group, while the other income groups rely on the market for housing. Nonetheless, housing assistance programs may help to stimulate economic growth if housing markets were functioning

properly. Since the 1998 reform, decentralization has also played an important role in housing provision over the last two decades. The central government has delegated implementation to local governments, with only monitoring and regulation carried out in the absence of concrete evaluation and a clear target. However, the homeownership rate in Indonesia remains high, at around 83,99%, with Banten province accounting for around 84,98% (BPS, 2022). Land and dwelling ownership has a particular cultural resonance because it has been an important symbolic and material value for most Asian societies (Huang et al., 2021). Housing is clearly an investment and consumption concern for many Asian societies, including Indonesians.

The private sector has emerged as the primary source of housing for the middle and upper classes, since then many new town developments have been constructed in Jakarta's semi-urban area (Firman, 2004). Many professionals work in Jakarta and live in the new town development built by private developers to improve housing conditions, the environment, and the cost of housing. This allows private developers to build their projects on a city scale up until now. The majority of private developers in Indonesia are members of two housing associations: REI (Real Estate Developers Association) for commercial housing developers and APERSI (Subsidized Housing Developer Association) for subsidised housing developers, both of which have over 9300 members in 34 Indonesian provinces.

As an 'enabler', the government focuses solely on developing a financial system for housing mortgages, with limited housing provisions for low-income individuals. Since 2010, the government has provided subsidized mortgages (KPR-FLPP/Kredit Perumahan Rakyat - Fasilitas Likuiditas Pembiayaan Perumahan) to assist first-time buyers with income up to Rp. 8,000,000 (\$521). The mortgage allows first-time buyers to purchase a house in the price range of Rp.165,000,000 - Rp.234,000,000 (USD 10.600 - 15.000) with fixed interest rates of 5 percent for up to 20 years (PUPR, 2023). The government also provides assistance to first-time buyers in the form of down payment assistance subsidies (SBUM/Subsidi Bantuan Uang Muka). In 2023, the government planned to allocate 220.000 units of subsidized housing through the KPR-FLPP (Republika.co.id, 2023).

Housing Condition in South Tangerang

In the 15 years since its establishment, South Tangerang has been dominated by large scale residential estates and many small and middle size residential clusters. South Tangerang's residential land area is approximately 108,4 km² (65%) of the total area of 164,86 km² (Disperkimta, 2022). According to the Central Bureau of Statistics / BPS (2023), the total population of South Tangerang is more than 1.378 million people, with a growth rate of 0.94 percent per year from 2021 to 2022. South Tangerang divided into seven districts (kecamatan): Ciputat, Pamulang, Pondok Aren, Pondok Ranji, Sawah Baru, Setu, and Serpong Utara.

It is not surprising that as the population grows, the population density in Tangerang grows as well, from 7.759 population/km² in 2019 to 8.362 population/km² in 2022 (BPS, 2022). South Tangerang city is relatively close to the Jakarta city center (about thirty kilometers) and has good access to transportation such as toll roads and the KRL commuter line, making it a popular choice for professionals working in Jakarta who are looking for a better living environment. South Tangerang's spatial plan was also developed to anticipate the development of commercial and business areas alongside residential areas as the dominant zoning. The Department of Public Housing and Agrarian Affairs (Disperkimta) defines a cluster as a residential estate with more than twelve houses, unless the residential estate has less than twelve houses and is classified as 'Rumah Swadaya' / self-built housing. South Tangerang has approximately 1.345 residential clusters with a total of 330.983 units. South Tangerang has 49 apartments built by private developers, the majority of which are in Pondok Aren and Serpong Utara. South Tangerang has only two rental housing flats (Rusunawa / Rumah Susun Sewa), Rusunawa Serua and Rusunawa Serua 2 (Disperkimta, 2023).

Table 1. List of large townships developed by private developer in South Tangerang

No	Development Name	Developer	Subdistrict	Area (hectare)	Year of Establishment
1	BSD City	Sinar Mas Land	Serpong	3786,1	1984
2	Bintaro Jaya	Jaya Real Property	Pondok Aren	2644	1979
2	Graha Jaya	Jaya Real Property	Sawah Baru	875,9	1990
4	Alam Sutera	Alam Sutera Realty	Serpong Utara	800	1993
5	Summarecon Serpong	Summarecon group	Serpong	750	1993
6	Villa Melati Mas	PT. Cowell Development	Serpong Utara	186,9	1984
7	Bukit Nusa Indah	Aditrans Putra	Ciputat	107,7	1985
8	Gading Serpong	Paramount Group	Serpong	100,8	2013

Source: Authors' analysis

Before South Tangerang was established in 2008, some major developers were already present in the area, including Bintaro Jaya, Alam Sutera, and BSD City (please see Table 1). Thousands of hectares have been transformed into integrated residential estates with commercial, school, hospital, and office districts. These private developers not only provide housing and related infrastructure, but they also contribute significantly to South Tangerang's Gross Regional Domestic Product (PDRB/Produk Domestik Regional Bruto). From 2018 to 2021, real estate was the largest contributor to the South Tangerang Gross Domestic Product, only to be surpassed by the construction sector in 2022. In 2022, both sectors have contributed 35.5% of total South Tangerang Gross Regional Domestic Product. It demonstrates the importance of the real estate sector to the South Tangerang government, and the government's desire to maintain real estate growth.

In comparison to other cities in Indonesia, South Tangerang has a high regional minimum wage of Rp. 4.584.519, - (USD 298) per month. The population's education level is also relatively high, with more than 70% having completed college or university (BPS, 2023). On the other hand, private-sector-led development has increased segregation in South Tangerang; many studies have examined this segregation and gate community phenomenon (Winarso & Firman, 2002; Firman, 2004; Roitman & Recio, 2020). In South Tangerang, income inequality has grown and become more concerning in recent years. Gate communities are also spreading throughout the South Tangerang area, transforming housing clusters and townships into the character of South Tangerang City. The rapid development of these townships has also contributed to the prevalence of

enclave villages in South Tangerang. These villages are located between and in the midst of large townships such as Bintaro, Alam Sutera, and BSD City (Kusno, 2020; Kurniawan & Tarigan, 2021). In cities, income inequality manifests itself through housing segregation based on resident income, as well as unequal access, use, and distribution of services, amenities, and resources (Roitman & Recio, 2020). Housing options that serve all income groups become questionable, and the researchers use these themes to develop research questions for interview.

METHODOLOGY

The study employed an exploratory qualitative research. The researchers attempted to comprehend the phenomena revealed by the findings. First, the study conducted a literature review on private sector-led development, Indonesian housing policy, including the phenomenon of gated communities, and post-sub urbanisation to fully understand the problems of urban development in South Tangerang. Second, this study delved deeper into the issues of private sector-led development and housing provision in Indonesia using case studies. In addition, a literature review of various documents and reports, as well as a survey, were conducted to improve the data's reliability. Third, data triangulation was carried out through interviews with housing and real estate stakeholders in South Tangerang.

The data were gathered between January 2023 and January 2024 through online and offline interviews. To investigate this phenomenon, researchers have conducted interviews to three South Tangerang government agencies, which were South Tangerang's Planning, Research and Development Agency (Bapelitbangda/Badan Perencanaan dan Penelitian Pengembangan Pembangunan Kota), South Tangerang's Department of Public Housing and Agrarian Affairs (Disperkimta/Dinas Perumahan Rakyat, kawasan Permukiman dan Pertanahan Kota), South Tangerang's Office of Building and Spatial Planning (Dinas Bangunan dan Penataan Ruang), two managers of large private developers in South Tangerang, one from South Tangerang's real estate association (Apersi/Asosiasi Pengembang Perumahan dan Permukiman Seluruh Indonesia) and two academics. The interviews were conducted in a series of offline and online meetings, with each interview lasting approximately 60 - 90 minutes. The

researchers used semi-structured interviews to explore pre-existing topics. In doing so, the researchers maintained a consistent line of inquiry based on research objectives, while allowing the interview to be more fluid and adaptable to the specific and changing context encountered (Yin, 2003). The researchers used thematic analysis to analyse the qualitative data, identifying common themes or patterns of meaning within the data. Furthermore, the researchers used data on housing prices from current landed house products built by private developers to gain an understanding of affordability issues. The JMA has become a barometer of housing prices and housing policy implications in Indonesia.

RESULTS

Land Value Increased as a Result of Private Sector-led Development

South Tangerang is a home to the largest and oldest large-scale private housing development in the JMA. After nearly four decades of urban transformation due to private-sector-led development, it is clear that one effect of these private-sector projects is an increase in land prices because the private sector has developed many infrastructure projects. Justino and Moore (2015) pointed out that real estate activities in the city exacerbate urban fragmentation and social differences. Private investment has raised land values, and the government has frequently facilitated real-estate investment. In JMA, land use changes increased significantly between 1990 and 1994. A study by Winarso and Firman (2002) revealed that massive land conversion, with land ownership concentrated in the hands of a few large developers. It is estimated that 15 companies owned more than 1000 ha of land in Botabek (Bogor, Tangerang, and Bekasi) by 1996. Furthermore, it was discovered that land developer companies collaborated to determine the land price. This has resulted in land speculations.

According to Bertaud (2015), failing to provide enough land for urban expansion leads to high housing prices, accelerates the formation of high-density slums, and reduces urban productivity. The concentration of massive land by private developers, as well as the supply of houses aimed at

middle- and upper-income households, has resulted in house prices that are out of reach for first-time buyers, with many who purchased for investment purposes. Because of the rapid rise in land prices, houses have become a low-risk investment rather than a source of housing for end users. As a result, from an urban planning standpoint, land use for residential purposes in South Tangerang is inefficient and wasteful. South Tangerang, which was once an option for people in Jakarta looking for better and cheaper housing, is now facing the same problem due to high land prices. It echoes the issue of land privatization, in which the commodification of urban development through various land use reforms that allowed land use rights to be traded resulted in the transfer of state resources to private hands, as well as the marketization of housing and land (Waibel, 2016).

Has the Private Sector become the Sole Determinant?

Studies in the land transformation of Jakarta's semi-urban have shown how land speculation and concentration of ownership has allowed these few developers to control thousands of hectares of land in the JMA (Winarso, 2000; Winarso & Firman, 2002). The concentration of massive land ownership by these private developers have allowed the developer to dictate house prices. This phenomenon is unhealthy. Apart from some fundamental factors such as population growth, economic growth, and rising incomes, as well as continued urban concentration, it is also argued that the increase in house prices is due to the developers' activity to exploit their housing product in order to gain a larger profit. The developers have a 'responsibility' to maintain price increases in order to encourage home buyers and investors to continue investing in their housing. The lack of government intervention in the South Tangerang housing market gives the developers to control the price massively. This has resulted in an increase in housing prices for both the primary and secondary markets.



Figure 2. Some banner advertising houses in new towns, sold ranging from Rp 3.8 billion to Rp 5 billion

Source: Authors' survey

It is likely that the government's reliance on the private sector for housing in South Tangerang has enabled the private sector to exert control over housing prices in the area. Land prices determined solely by the developers may indicate an oligopolistic market/monopoly and unhealthy competition, which will cause bubbling, and will disrupt the property market and infrastructure development (Please see Hu et al., 2016; Liu, Miao, & Zha, 2016; Liu, Wang, & Zha, 2013; Tsutsumi & Seya, 2008; Zhang et al., 2017). In countries such as in China, Vietnam, and Thailand the government has the power to control land transformation in other cities because the state owns the land. However, in Indonesia the government has lost its power to control land transformation because the state does not own the land and does not have land banking.

Mind the Gap: Housing Prices Leading to the Affordable Crisis

It has commonly been assumed that having a variety of housing types in one location allows people from all socioeconomic backgrounds to choose a housing type based on their needs and circumstances, while still having access to formal housing. Nonetheless, as private-sector-led development becomes the primary driver of housing provision in South Tangerang, affordability and housing options for ensuring that every household has access to decent housing become more uncertain. One possible explanation

for this is that the majority of private developers rarely build types 36 m², 45 m², and 90 m² that are suitable for first-time buyers, and even when they do, the prices are usually higher than Rp 1 billion.

On the other hand, the South Tangerang government only constructed Rental Housing (Rusunawa / Rumah Susun Sewa) to address the housing shortage and assist low-income households (MBR/Masyarakat Berpenghasilan Rendah); other income groups must rely on the housing market to meet their housing requirements. Many households working in Jakarta who are looking for housing in South Tangerang are experiencing difficulties due to the unaffordable housing market. The government actually requires private developers to build houses based on the 1:3:6 formula, which states that for every single luxury house built, the developers must build three modest and six low-cost houses in the same location. However, the regulation has never been enforced or loosely interpreted, allowing low-cost houses to be built in unfavourable locations or even postponed indefinitely (Firman, 2004; Dijkgraaf 2000).

Table 2. Housing and Land Prices in New Towns in South Tangerang

No	New Town	Smallest Size (Building/Land)	Price in million (Rp)	Largest Size (Building/Land)	Price in million (Rp)
1	Bintaro Jaya	33/60	1.032	294/208	10.000
2	Alam Sutera	92/75	1.048	568/480	16.000
3	Bumi Sepong Damai (BSD) City	45/52	1.264	760/558	11.000
4	Summarecon Serpong	61/60	1.375	248/144	6.600
5	Gading Serpong	41/32	1.008	328/300	9.874

Source: Authors' analysis

Table 2 shows that the housing price in South Tangerang ranges from Rp 1.032.000.000, - (USD 64.500) for only 33/66 houses to Rp 16.000.000.000 (USD 1 million) for 568/480 houses, which can only be afforded by middle-high-income households. Although the housing backlog in South Tangerang is relatively small in comparison to other cities, as housing prices rise, the affordability problem worsens (interviewee A, 2023). The local government recognizes that the housing problems cannot be solved without the government's intervention, but the high cost of land makes the assessment cost for public housing is too high, so the government focuses on other programs such as house improvement programs on a smaller scale. South Tangerang is also not a part of Indonesia's national housing program, referring to the one million house program, which was launched in 2015

by Indonesian President Joko Widodo. The land price, which has already reached Rp. 3 million (USD 190) per m² outside the new towns built by private developers and more than Rp. 5 million (USD 318) per m² inside the new towns, makes it difficult for local governments to participate in the national house program (interviewee B, 2023).

The case study in South Tangerang is not unique to South Tangerang, but has become a common occurrence in other cities throughout Indonesia. Declining housing affordability, increased housing shortages in urban areas, a lack of finance availability and affordability, and rising housing market speculation are all significant factors contributing to housing market insecurity in Indonesia (Tarigan, 2017).

DISCUSSION

The High Cost of Land has an Impact on the Government's Strategy for Providing Affordable Housing

The government's housing assistance strategies must be adjusted due to the high cost of land. Based on the interviews with the local government, vertical flat housing has become the government's main choice to mitigate the high cost of land acquisition and make land use more effective. So far, the South Tangerang government has only two rusunawa (affordable rental housing), Rusunawa Serua and Rusunawa Serua 2 with total 144 units, while rusunami (affordable owned housing) has not been able to be built. The South Tangerang government only intends to construct affordable rental housing for civil servants (Rusun ASN) in the near future to assist local civil servants who are unable to purchase housing (Disperkimta, 2023). Due to the public housing sector's limitations, the homeownership has been relatively significant, resulting in reliance of commercial flats (rusun komersial) built by the private sector. The government only provides recommendations/ technical direction to private developers regarding building permits in order to ensure that the development is in accordance with the regulations.

South Tangerang's government then focus on housing improvement programs (program bedah rumah), particularly for households in deciles 1 &

2, in order to eliminate extreme poverty, which the local government hopes to achieve by 2024. Nonetheless, the scope of the housing improvement program remains limited, with only 500 units renovated in 2023 (Siarnitas. id, 2023). While the housing improvement program has had some success in reducing extreme poverty, the government housing program never addresses affordability issues.

The housing options in South Tangerang are also limited for many households as many private developers choose to build house for middle-and-high income households because the land price keeps increasing. Nevertheless, housing continuum from different household backgrounds necessitates different policy interventions based on the family life cycle. Several studies have been conducted to investigate the relationship between the family life cycle and housing tenure decisions (Simon & Kearns, 2020; Skobba, 2023). According to Turner (1976), forecasting housing demand always fails because it is incorrectly assumed that people will spend a certain proportion of their income on housing. Even within the same income bracket, the percentage of income spent on housing varies greatly. Thus, people should be able to select housing tenures in the market that are appropriate for their income and needs. In addition, the high land price has created a housing need for affordable rental housing, and housing assistance. Nonetheless, housing assistance cannot be effectively implemented. Housing provision in South Tangerang is now dominated primarily by market-driven housing, both for rental and homeownership.

CONCLUSION

The South Tangerang case demonstrates that affordability issues, a lack of housing options, and an unclear housing policy have all had a significant impact on the housing situation in the area. For decades, private-sector-led development has been the model for South Tangerang urban development. The South Tangerang urban development pattern and housing system may fail to sustain housing affordability, particularly for first-time buyers, preventing them from becoming homeowners. The underlying argument is that as land has become more valuable, housing resource costs have risen, and housing provision has not kept pace with the population and economic growth. As a result, the study supports the argument that the government's

intervention in market economics is required such as monitoring the use of scarce resources efficiently as possible and the distribution of available resources in a more equitable manner.

This study also includes a unique case study in which vast amounts of land owned by the private sector have resulted in uncontrolled urban development, triggering a housing affordability crisis. Several studies have looked into the affordability issues in JMA areas (Elmanisa et al., 2016; Winarso & Firman, 2002). The study revisited the phenomenon after decades of private-sector-led development, which has been the dominant actor in the development of Jakarta's peri urban area. While Winarso and Firman (2002) argued that excessive land development by a few developers has caused the housing market to collapse and has contributed to the Indonesian monetary crisis in 1997. This study emphasizes that uncontrolled private sector development can lead to other acute problems in the future. Due to limited government's intervention in housing provision and land transformation control, the housing continuum in South Tangerang has become limited, making even subsidized housing in the form of landed houses in South Tangerang almost impossible due to land prices. The researchers concluded that the government's active role in controlling scarce resources such as land remains necessary, and that the solution cannot be found solely in the market. It has become increasingly important as homeownership remains the primary focus of housing policy in most Southeast Asian countries, while cities are viewed as engines of long-term economic growth (Tarigan, 2022).

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AUTHOR CONTRIBUTIONS

All authors contributed to the research design, data collection, and analysis. The corresponding author is writing the final manuscript.

CONFLICT OF INTEREST

The authors declare there is no conflict of interest.

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