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# WHAT IS THE INCLUSIVE CITIES BAROMETER?

THE BELIEF THAT WE SHOULD NEVER SETTLE FOR THE WORLD AS IT IS, BUT INSTEAD, ACTIVELY DRIVE IT FORWARD. AS REAL ESTATE ADVISORS, WE AND OUR CLIENTS ARE STEWARDS OF THE BUILT ENVIRONMENT, SHAPING CITIES AND INFLUENCING THE LIVES OF THEIR INHABITANTS.

In line with this philosophy, we have developed the Inclusive Cities Barometer to foster a data-driven dialogue on the influence of real estate activities on urban inclusion and the social fabric of our cities. The *Inclusive Cities Barometer* evaluates the inclusiveness of **44 EMEA CITIES**, based on 110 metrics across 4 dimensions and 11 sub-dimensions, thereby offering a comprehensive view of urban inclusion.

### THE INCLUSIVE CITIES BAROMETER SERVES AS:



## A SOCIAL IMPACT QUANTIFIER

We believe that the social impact of our cities can be systematically mapped, tracked, and quantified. With an extensive analysis of of almost 5,000 data points, we have compiled the industry's first and most comprehensive dataset on inclusive cities.



## A ROADMAP TO INCLUSIVE CITIES

The cities represented in the Barometer are at varying stages of their journey towards more inclusive and vibrant urban environments. Instead of ranking cities by performance, our Barometer measures their progress relative to these starting points, highlighting their successes and providing detailed, actionable pathways for improvement.



## A CALL TO ACTION

As key players in the development, management, and evolution of cities, the real estate and construction sectors make daily decisions that shape urban spaces and influences the lives and inclusivity of communities and citizens. The Barometer acts as a prompt for the commercial real estate industry to challenge the social status quo, offering guidelines on integrating and enhancing social value at every decision-making stage—from individual assets to city-wide portfolios.

THROUGH THE INCLUSIVE CITIES BAROMETER, WE AIM TO GUIDE AND INSPIRE CITIES AND INDUSTRY STAKEHOLDERS TOWARDS CREATING MORE INCLUSIVE, VIBRANT, AND SUSTAINABLE URBAN ENVIRONMENTS.

CUSHMAN & WAKEFIELD INCLUSIVE CITIES BAROMETER | CITIES THAT NEVER SETTLE





## WHAT IS AN INCLUSIVE CITY?

INCLUSIVE CITIES ARE URBAN ENVIRONMENTS THAT PRIORITISE DIVERSITY, EQUITY, AND ACCESSIBILITY FOR ALL RESIDENTS, REGARDLESS OF THEIR BACKGROUND, IDENTITY OR SOCIO-ECONOMIC STATUS.

of citizens in all facets of urban life, including vulnerable and minority groups. Inclusive Cities provide equal access to the built environment and social infrastructure, reflecting principles of spatial justice.



They promote the dignified, independent, and productive participation Access to SAFE, GREEN **SPACES AND PLAYGROUNDS ≥**}} UNIVERSAL **VIBRANT CAFES, RANGE OF** Proximity to **DESIGN EMPLOYMENT** high quality, reliable, BARS, SHOPS, promote physical activity, for visible affordable **PUBLIC RESTAURANTS OPTIONS** for and invisible AND PLACES both service, **TRANSPORTATION** disability to increase urban labour and knowledge attractiveness work

**CLOSE CONNECTIVITY** 

**BETWEEN HOUSING** 

INCLUSIVE CITIES BAROMETER | CITIES THAT NEVER SETTLE CUSHMAN & WAKEFIELD



## WHAT CAN AN INCLUSIVE CITY DO?

By prioritising equitable distribution and accessibility of resources, amenities, and services, an inclusive city facilitates equitable access to opportunities for all citizens by ensuring equal access to quality housing, transportation, education, healthcare and employment opportunities. Through a collaboration between urban planners, government, design and real estate industries, inclusive cities strive to create thriving, vibrant and successful environments for everyone to flourish.

Through inclusivity, a city can enhance its social and economic development potential – inclusivity should be recognised as an asset rather than a cost. More inclusive cities tend to attract more talent and innovation, leading to investment and growth. This growth can extend beyond organisational growth, but can also create growth opportunities for individuals with increases in social mobility and entrepreneurship. They are also more sensitive and adaptable to the changing needs and expectations of their citizens and stakeholders.

However, many complex and interrelated factors influence inclusivity in an urban context. Are there high-quality jobs for all skill groups? Can people travel safely, reliably, and cost-effectively on public transport to reach these jobs? Are they safe leaving buildings in parts of the city late at night? And do they face discrimination or isolation in certain parts of the city? Combining these factors to create inclusive cities relies on collaboration between communities, policymakers, and organisations that create and manage physical spaces.



THE CITIES REPRESENTED WITHIN
THIS REPORT HAVE EMBARKED
ON THEIR INCLUSIVITY JOURNEYS.
MEASURING PROGRESS CAN BE
A POWERFUL STEP TOWARDS
CONTINUOUS IMPROVEMENT.

This industry-first report has been developed to further that goal. Through the collection, aggregation and evaluation of this data, we have been able to quantify how to create social value within the built environment and through responsible real estate activities.



#### **HOW WE DEFINE INCLUSIVE CITIES:**



## **SOCIAL INCLUSIVITY**

INCLUSIVE CITIES
PROVIDE ACCESS TO
ESSENTIAL SOCIAL
INFRASTRUCTURE
AND FACILITATE
POSITIVE MENTAL
AND PHYSICAL
HEALTH OUTCOMES
FOR DIVERSE
AND INTEGRATED
POPULATION
GROUPS.

## POPULATION DENSITY & GROWTH

- Population density living within 10km² (targeting a balance; neither too high or low)
- Population living in urban vs sub-urban, rural environment
- Population change 2025 2050

#### **HEALTH & WELLBEING**

- Quality of life and life expectancy
- Rates of disease and probability of dying
- Physical health, obesity of vulnerable groups, such as women, children, ethnic and socio-economic groups
- Access to healthcare
- Mental health, wellbeing and happiness

## TOLERANCE & PERSONAL FREEDOM

- Political, religious and personal freedom and respect
- Government effectiveness perception
- Migration and immigration tolerance
- Ethnical, linguistic and religious integration

#### SPECIAL POPULATION GROUPS

- Visible and invisible disability
- Gender, and gender identification
- Ethnicity, religion and language
- Age, and parent friendliness

#### EDUCATION

- Government spending on education
- Educational achievement and attainment
- Minimal gender gaps

## **ECONOMIC INCLUSIVITY**

MANY INCLUSIVE
CITIES CONSIDER
THE BALANCE
OF EMPLOYMENT
OPPORTUNITIES
AND AVAILABILITY

BETWEEN
DIFFERENT
SOCIO-ECONOMIC
GROUPS AND
HAVE A NATIONAL
COMMITMENT
TO WEALTH
REDISTRIBUTION.

## ECONOMIC VITALITY, GROWTH & INNOVATION

- Low poverty rates
- Strong traditional and entrepreneurial job markets
- Access to financial services
- Progressive taxation policies aimed at redistributing wealth
- Reinvestment of revenue into social infrastructure

#### **EMPLOYMENT**

- High employment
- Low unemployment
- Low vulnerable employment
- Minimal gender and age employment gaps
- Fair living wages for all workers



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#### **HOW WE DEFINE INCLUSIVE CITIES:**



## **SPATIAL INCLUSIVITY**

## INCLUSIVE CITIES RAISE THE QUALITY OF LIVING

THROUGH THE BUILT ENVIRONMENT, ENHANCE PUBLIC SAFETY AND USE MOBILITY AND DIGNIFIED ACCESS TO PROMOTE EQUITY.

#### **HOUSING & PROPERTY**

- Fair and proportionate income-to-property price ratio
- Fair rental price of housing
- Availability and quality of social housing
- Rental price of commercial property space

## SECURITY, SAFETY & SOCIAL INFRASTRUCTURE

 Low crime rates, including safety of women

• Legal rights and low discrimination

 Access to water, electricity and safe sanitation

## ACCESSIBILITY & URBAN ATTRACTIVENESS

- Access to quality and accessible public transportation
- Low cost of public transportation
- Less time in rush hour and a higher commuting quality of life

## **ENVIRONMENTAL INCLUSIVITY**

## INCLUSIVE CITIES STRIVE TO MAINTAIN LIVEABLE ENVIRONMENTS

THROUGH
SUSTAINABLE
URBAN PLANNING
AND GREEN
INFRASTRUCTURE.

#### POLLUTION

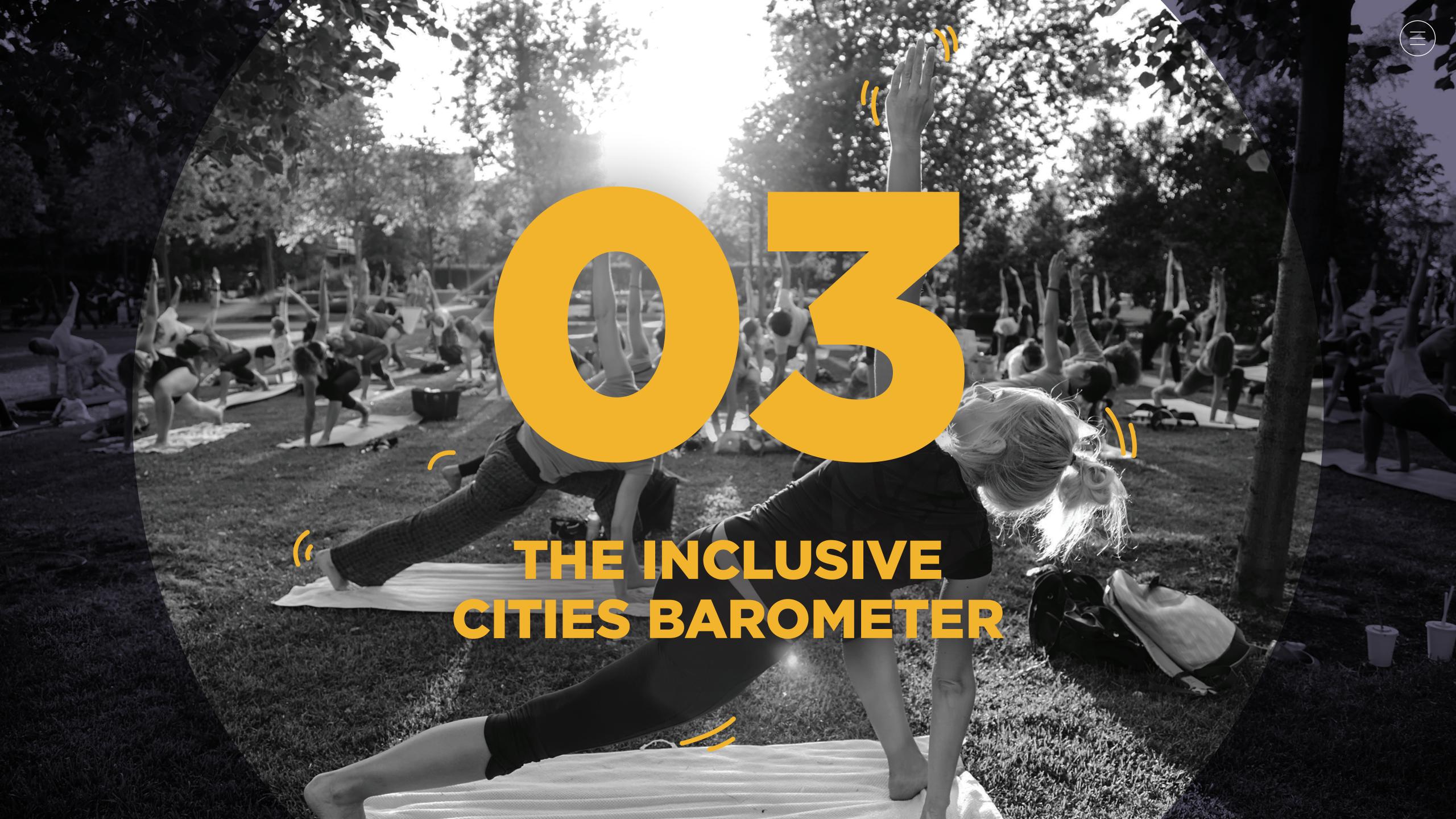
- High air quality and low exposure to VOC's and airborne particles
- Low CO<sub>2</sub> emissions

#### CLIMATE, RESILIENCE & ADAPTION

- Strong SDG and government preparedness
- Liveable average temperatures
- Tree shade coverage and access to green, natural space



CUSHMAN & WAKEFIELD INCLUSIVE CITIES BAROMETER | CITIES THAT NEVER SETTLE

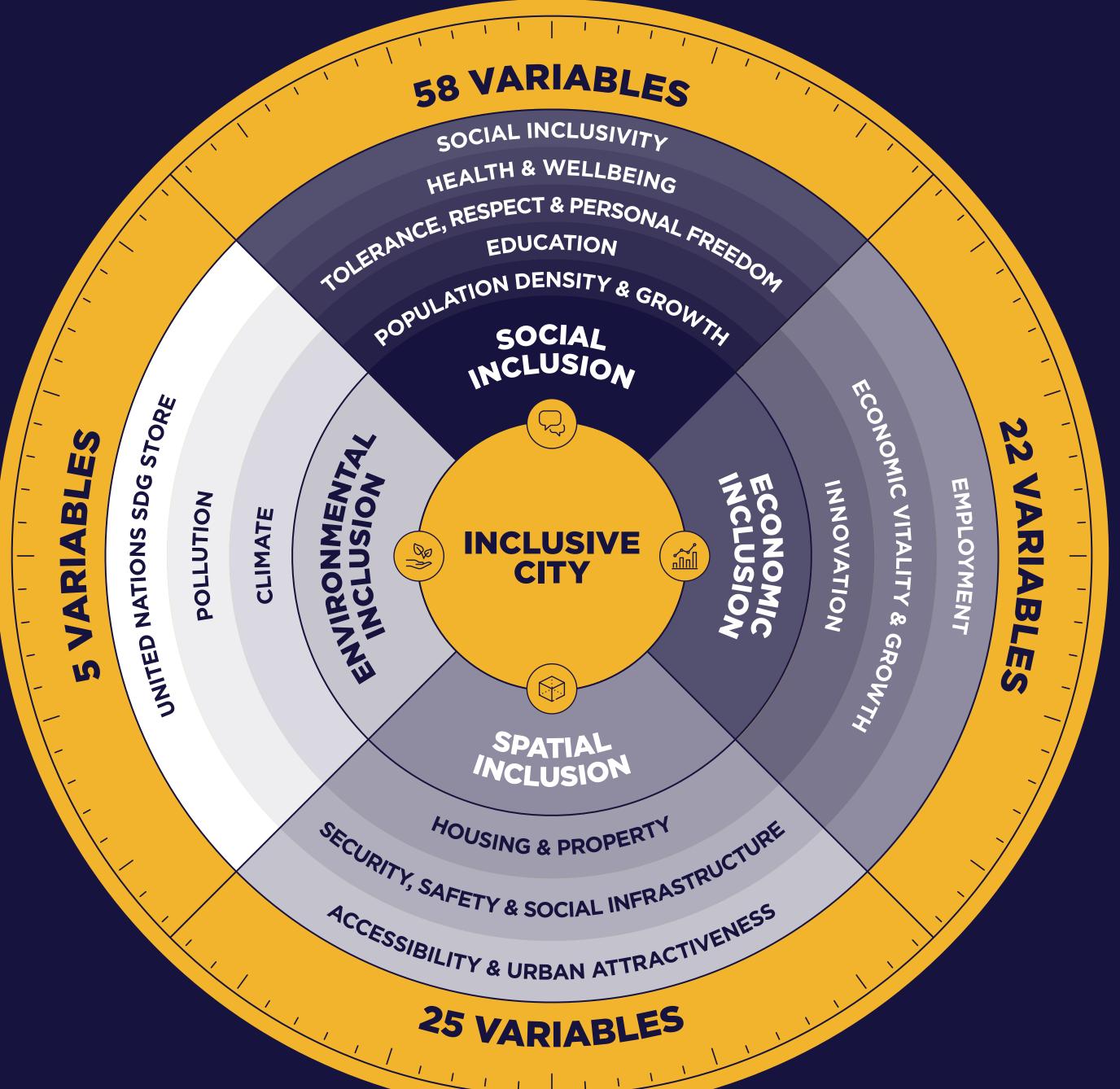




## THE DATA

TO CREATE THE INCLUSIVE
CITIES BAROMETER,
CUSHMAN & WAKEFIELD
LEVERAGED FINDINGS
FROM PEER-REVIEWED
SCIENTIFIC SOURCES
TO IDENTIFY THE MOST
CRITICAL DATA POINTS
THAT MEASURE THE
SOCIAL URBAN INCLUSION
OF CITIES.

Data was collected from leading global third-party sources, such as the World Bank and United Nations and combined with internal insights to create the world's most comprehensive Inclusive Cities Barometer.



Based on this research, 110 variables were identified and then categorised into 11 sub-dimensions which were then rolled up into four key dimensions. Scores were then combined in a weighted model to analyse the inclusivity of 44 EMEA cities across Europe, the Middle East and Africa. Model weighting followed an objective process.

Cities were selected based on their representation of approximately 85% of EMEA office space tracked by Cushman & Wakefield, covering the majority of corporate occupiers portfolio locations.

## THE CITY GROUPINGS

CITIES WERE CATEGORISED INTO QUARTILES ALIGNING WITH DIFFERENT STAGES OF THEIR JOURNEY TOWARDS DEVELOPING INCLUSIVE URBAN ENVIRONMENTS, REFLECTING VARYING DEGREES OF MATURITY.



## THESE GROUPS REFLECT THE DIVERSE PATHS CITIES ARE UNDERTAKING TO ACHIEVE INCLUSIVITY:

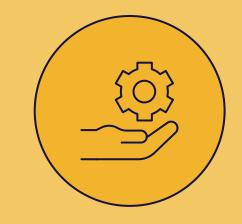


#### **MATURE URBAN CENTRES**

COMMITMENT TO SOCIAL INCLUSION, THAT PRIORITISE THE NEEDS OF CITIZENS, focusing on equal distribution of wealth alongside strong but

balanced economic growth.

**CITIES WITH A LONGSTANDING** 



### **SOCIAL DRIVERS**

CITIES DEMONSTRATING
STRONG RATES OF SOCIAL
INCLUSION ACROSS MANY
OF THE DIMENSIONS,

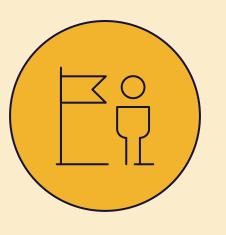
although not as mature in their journey to reduce wealth and lifestyle inequality.



#### **RAPID RISERS**

CITIES PREVIOUSLY LESS ACTIVE
ON EQUITABLE ECONOMIC AND
SOCIAL DEVELOPMENT

that are now rapidly advancing urban inclusion initiatives.



#### **EMERGERS**

OF THEIR JOURNEY
TO INCREASE RATES
OF URBAN INCLUSION,

but with strong ambition.

CUSHMAN & WAKEFIELD INCLUSIVE CITIES BAROMETER | CITIES THAT NEVER SETTLE



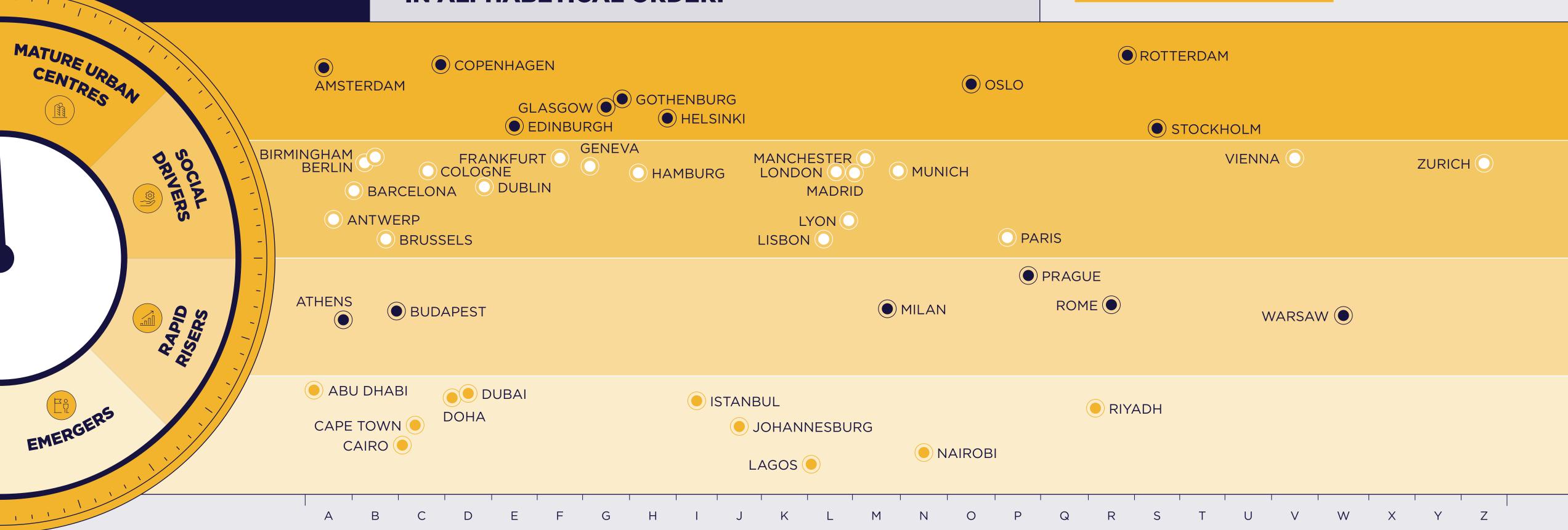
## THE RESULTS

RESULTS FROM THE BAROMETER CLUSTER 44 EMEA CITIES INTO OUR FOUR CITY PROFILES, AS FOLLOWS.

RESULTS ARE PRESENTED IN ALPHABETICAL ORDER:

A DETAILED SUMMARY OF THE PERFORMANCE OF EACH OF THESE CITIES, INCLUDING WHERE THEY EXCEL AND OPPORTUNITIES FOR IMPROVEMENT, CAN BE FOUND ON OUR WEBSITE.





CITIES ARE LISTED IN ALPHABETICAL ORDER

THESE CITY SNAPSHOTS
FOCUS ON A POINT OF
SUCCESS BASED ON THE
FOUR DIMENSIONS OF
THE BAROMETER. THESE ARE
NOT INTENDED TO REPRESENT
A COMPREHENSIVE STORY
OF EACH CITY'S COMMITMENTS
TO URBAN INCLUSION.

#### **BEST OVERALL PERFORMER**

STRONG **ECONOMIC**INCLUSIVENESS PERFORMER

STRONG **SOCIAL** INCLUSIVENESS PERFORMER

STRONG **SPATIAL** INCLUSIVENESS PERFORMER

STRONG **ENVIRONMENTAL** INCLUSIVENESS PERFORMER

## **BEST OVERALL PERFORMER**

## ROTTERDAM, THE NETHERLANDS

THE **OVERALL BEST PERFORMER** IN THE BAROMETER WAS ROTTERDAM, THE NETHERLANDS. ROTTERDAM HAS EMERGED AS A LEADING GLOBAL CITY IN DRIVING URBAN INCLUSION, SETTING A PRECEDENT FOR OTHER URBAN CENTRES WORLDWIDE.

Rotterdam's vibrant history as a trade and innovation hub stems from its rich maritime heritage, and prominence within the global architecture and educational fields; being the home of influential figures such as the renowned architect, Rem Koolhaas as well as the famous Dutch Scholar and humanist, Desiderius Erasmus. This heritage fosters the city's inclusive, diverse, and dynamic culture.

In cultivating **economic inclusivity**, Rotterdam has focused on ensuring a wide range of jobs across the socio-economic spectrum, including both highly skilled, knowledge-work, such as the presence of Unilever; as well as a range of manual employment opportunities, such as available within Rotterdam Harbour. As a port city with a history as a hub of transition, Rotterdam has a longstanding tradition of **social inclusivity**, enriched by its diverse population. This mix of cultures has transformed the city into a dynamic melting pot, fostering a vibrant and cosmopolitan atmosphere. This diversity is further supported by strategic spatial inclusivity initiatives, such as the redevelopment of Rotterdam South, exemplified by the 'Hart van Zuid Rotterdam' (Heart of South Rotterdam) project.

This area is characterised by higher rates of unemployment, social housing and vulnerable communities. As a result, there is a strong emphasis on enhancing the quality and availability of housing and urban attractiveness, as well as improving public transport links to the city centre to better integrate this area with the rest of Rotterdam. Finally, Rotterdam, home to Europe's largest harbour and the biggest seaport outside East Asia, traditionally a high consumer of fossil fuels, is actively addressing its **environmental impact.** Through initiatives like the 'Sustainable Port Program' and the 'Shore Power Projects,' the city aims to reduce the climate and pollution effects of harbour operations and enhance global marine shipping sustainability.

These efforts showcase Rotterdam's leadership in creating an inclusive city that enables all its citizens to thrive.







THESE CITY SNAPSHOTS **FOCUS ON A POINT OF SUCCESS BASED ON THE** FOUR DIMENSIONS OF THE BAROMETER. THESE ARE NOT INTENDED TO REPRESENT A COMPREHENSIVE STORY OF EACH CITY'S COMMITMENTS TO URBAN INCLUSION.

#### **BEST OVERALL PERFORMER**

#### **STRONG ECONOMIC INCLUSIVENESS PERFORMER**

STRONG **SOCIAL** INCLUSIVENESS PERFORMER

STRONG **SPATIAL INCLUSIVENESS PERFORMER** 

STRONG ENVIRONMENTAL **INCLUSIVENESS PERFORMER** 

## STRONG ECONOMIC INCLUSIVENESS

COPENHAGEN STANDS OUT AS A MODEL OF INCLUSIVE **ECONOMIC** PERFORMANCE AND OPPORTUNITY AMONG EMEA CITIES, YET IT DISTINGUISHES ITSELF WITHIN A BALANCED AND PROPORTIONATE COST OF LIVING COMPARED TO OTHER HIGH-PERFORMING URBAN CENTRES.

At the national level, Danish GDP per capita ranks among the top 10 in the world, underscoring Denmark's strong economic health. This robust economy benefits from high labour force participation, low youth and long-term unemployment, as well as low vulnerable employment. These factors collectively lead to lower poverty levels and higher level of economic inclusion.

The success of economic inclusivity within Copenhagen can be attributed to a policy of wage moderation and labour market reforms, which prioritises jobs and fair wages for all. This approach shows that economic and social inclusivity can be achieved together, establishing Copenhagen as a model of economic inclusivity and liveability both within the EMEA region, and globally.



BROENS GADEKØKKE

## **PERFORMER**



FIND OUT MORE

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## STRONG SOCIAL INCLUSIVENESS PERFORMER

## AMSTERDAM, THE NETHERLANDS

AMSTERDAM IS RENOWNED FOR ITS PROGRESSIVE APPROACH TO **SOCIAL INCLUSIVITY,** CONSISTENTLY RANKING HIGHLY ON QUALITY OF LIFE INDICES.

In 2024, it was named the second-best city in the world for quality of life, a testament to its inclusive environment. The city is particularly noted for its advocacy for the LGBTQ+ and within the disability communities.

Amsterdam leads globally in LGBTQ+ rights, underscored by the Dutch government's early legalisation of same-sex marriage in 2001, which influenced many other countries. This progressive stance is celebrated annually with one of the world's most prominent Pride parades, highlighting the city's vibrant support for LGBTQ+ rights.

Amsterdam aims to be an inclusive city, as outlined in its Spatial Development Plan 2050, which emphasises equal opportunities for all citizens regardless of background or health.



The Institute for Advanced Metropolitan Solutions (AMS), based in Amsterdam, focuses on technology and innovative urban design to address sustainability, health, and wellbeing challenges in the city. AMS, founded by TU Delft, Wageningen University, MIT, and the City of Amsterdam, utilises the city as a testing ground for scientific research.

Additionally, Amsterdam is proactive in supporting its disabled citizens. It was one of the first municipalities globally to initiate an 'Inclusion Agenda'. This local inclusion agenda engages disabled residents to shape strategic investments that enhance accessibility and independent participation throughout the city. The plan includes improving physical accessibility in public buildings and venues, enabling full participation for people with both visible and invisible disabilities. These comprehensive efforts demonstrate Amsterdam's dedication to fostering an environment that supports a diverse range of citizens and their experiences, reinforcing its status as a leader in social inclusivity within the EMEA region.





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## STRONG SPATIAL INCLUSIVENESS PERFORMER

## **GLASGOW, SCOTLAND**

GLASGOW STANDS AS AN EXAMPLE OF **SPATIAL INCLUSIVITY**IN THE EMEA REGION WITH ITS ROBUST TRANSPORTATION
NETWORK, CONNECTING PEOPLE FROM DISPARATE RESIDENTIAL
AREAS TO THE MANY CENTRES OF WORK AND EMPLOYMENT
IN AND AROUND GLASGOW.

The Glasgow Subway, the third-oldest underground metro system in the world, covers a significant portion of the city, facilitating efficient travel for commuters and visitors alike. This accessibility translates to shorter commute times and affordable transportation options, supported by initiatives like the SmartZone ticketing system, promoting cost-effective and convenient travel, adding to the vitality of the city.

The city's vibrant nightlife and retail scene around Buchanan Street offers diverse leisure and entertainment options. From trendy bars and clubs to traditional pubs and shopping centres like Buchanan Galleries, Glasgow has in recent years been heralded for its improvements to urban attractiveness and Glasgow's legacy of Victorian-era social tenements, now revitalised, contributes significantly to its ongoing commitment to social and affordable housing with a comparably low 'property price to income ratio' in comparison to other EMEA cities. The Strategic Housing Investment Plan (SHIP) is vital for ensuring housing accessibility across diverse socio-economic backgrounds. Recently, 7,500 affordable homes were announced for construction between 2024-25 and 2028-29, with 80% designated as social housing, demonstrating a strong commitment to inclusive spatial planning.







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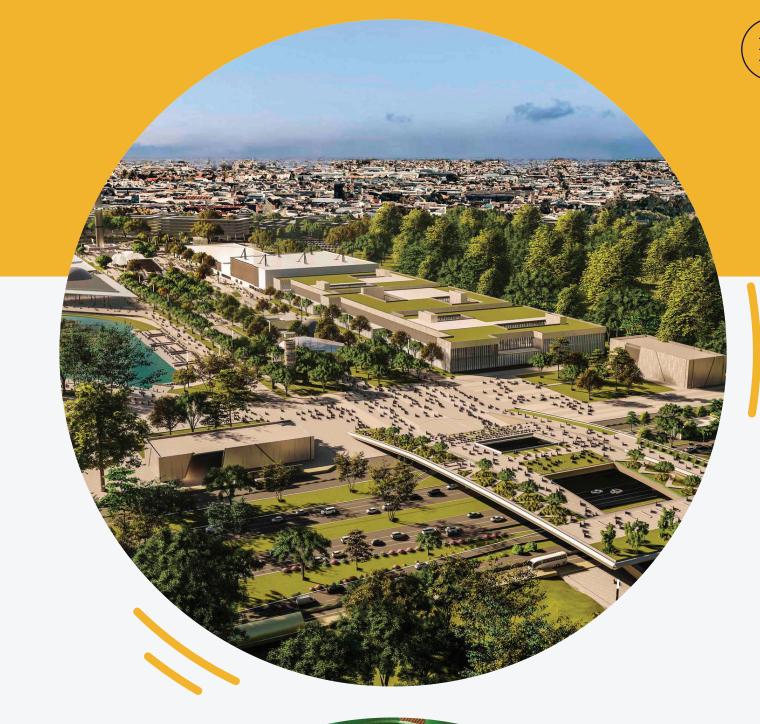
## STRONG ENVIRONMENTAL INCLUSIVENESS PERFORMER

## MADRID, SPAIN

MADRID'S LEADERSHIP IN **ENVIRONMENTAL INCLUSIVITY** ACROSS THE EMEA REGION IS CHARACTERISED THROUGH INNOVATIVE PROJECTS LIKE THE 'METROPOLITAN FOREST'.

This 75-kilometre-long corridor aims to create a new "green lung" for the city by planting 1.5 million trees, along with eco-friendly bridges and recreational centres, as well as connecting existing parks for cyclists and pedestrians, enhancing accessibility to schools, offices, and Madrid's Barajas Airport to provide safe and clean environments for citizens to exercise and move around the city. The emphasis on reducing reliance on cars and expanding access to green space aims to achieve multiple benefits. By increasing tree shade coverage, it significantly lowers summer temperatures and acts as natural air filtration, reducing airborne and noise pollution. Additionally, it provides accessible outdoor green spaces, proven to enhance both physical and mental wellbeing.

This project stands out as one of the most notable 'Nature-based Solutions' initiatives in the EMEA region. Nature-Based Solutions, as defined by the International Union for Conservation of Nature (IUCN) and the World Bank, involve addressing societal challenges through nature-oriented approaches. In the case of Madrid's Metropolitan Forest, these solutions are specifically designed to bolster resilience against water scarcity, temperature extremes, pollution, and biodiversity loss by increasing the city's urban forest coverage. The IUCN has recognised that implementing such solutions could contribute significantly to achieving the mitigation targets outlined in the Paris Agreement, with up to 37% of the necessary reductions in greenhouse gas emissions achievable by 2030. Madrid's leadership in embracing these nature-based solutions underscores its commitment to environmental inclusivity and sustainability and demonstrates its willingness to never settle.





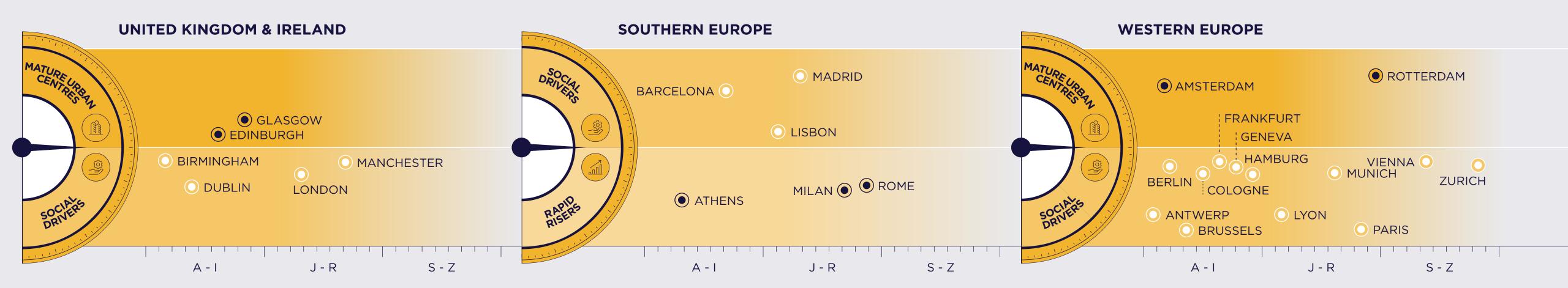


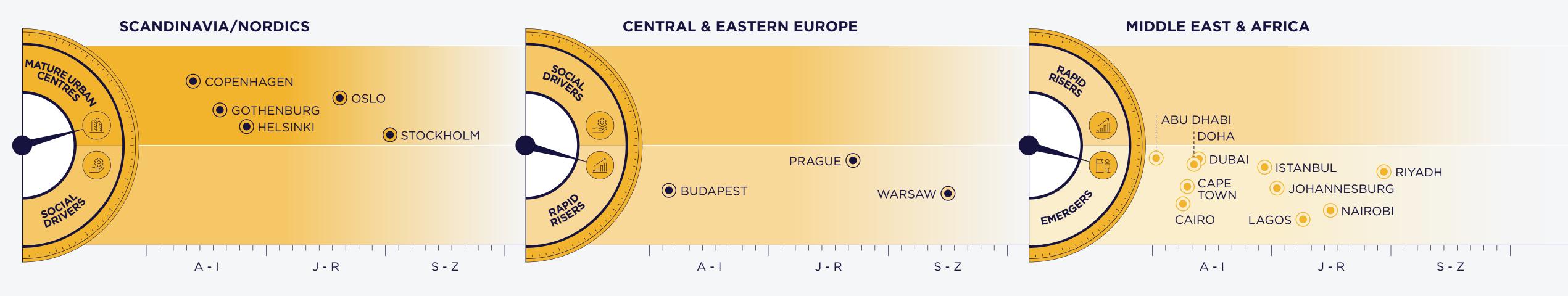


## SUB-REGIONAL VARIATIONS

A DETAILED SUMMARY OF THE PERFORMANCE OF EACH OF THESE CITIES, INCLUDING WHERE THEY EXCEL AND OPPORTUNITIES FOR IMPROVEMENT, CAN BE FOUND ON OUR WEBSITE.







CITIES ARE LISTED IN ALPHABETICAL ORDER



## WHY NOT A RANKING?

WE HAVE CHOSEN NOT TO
PRODUCE A RANKING AS WE
BELIEVE THAT RANKINGS FOSTER
COMPETITION AND INHERENTLY
COMPARE CITIES ON A SCALE
THAT DOESN'T ACCOUNT FOR
THE RICH TAPESTRY OF UNIQUE
HISTORIES, CULTURES, AND
GEOGRAPHICAL CLIMATES
THAT EACH CITY EMBODIES.

Instead, we've developed a barometer that highlights successes as well as areas for improvement while recognising that not all cities "start from the same starting line," allowing for a more nuanced and constructive approach to supporting our clients to increase social value through urban inclusion.



# THERE'S NO SUCH THING AS A PERFECT CITY

DESPITE STRONG PERFORMANCE
ACROSS EMEA, THERE IS NO
SUCH THING AS A PERFECT CITY
DUE TO DIVERSE CITIZEN NEEDS
AND EVOLVING PRIORITIES.

Cities are dynamic ecosystems shaped by various factors, making "ideal" conditions subjective and likely different for different groups of people.

Constant change, driven by technology and global challenges such as climate change, further complicates the pursuit of perfection.

While perfection may elude us, our aim should be to continuously pursue and enhance urban environments that prioritise inclusivity, equity, and wellbeing for all residents.





# WHY ARE INCLUSIVE CITIES IMPORTANT?

TOGETHER, CITIES ARE THE WORLD'S ECONOMIC POWERHOUSE AND HOME TO MOST OF THE GLOBAL POPULATION.

Approximately 57% of people live in urban areas, and cities contribute around 80% of global GDP. Viewed through this lens, inclusivity and its influence on productivity and wellbeing, is an issue that affects almost 5 billion people and USD71 trillion.

WHILE WE CAN CELEBRATE MANY
SUCCESSES IN TODAY'S CITIES, SIGNIFICANT
ISSUES REMAIN. WHILE NOT EXHAUSTIVE,
BELOW ARE SOME EXAMPLES OF WHERE
INEQUALITY CAN EMERGE AND HOW

#### **OPPORTUNITIES TO IMPROVE INCLUSION BY DIMENSION**

## SOCIAL INCLUSIVITY



Currently, one in four European citizens is over **60 years** of age.

**By 2030,** that figure will rise to almost one in three, with many people staying in work after retirement age.

This underscores the importance of designing cities and buildings that support ageing-populations by facilitating-independent work and socialisation.

**Essential elements** include flat, walkable pathways, clear wayfinding, and ample public seating.



## **ECONOMIC INCLUSIVITY**



**27%** of the over-16 population in the EU have some form of disability.

This population of **101 million** people has double the unemployment rate than those without disability.

Designing cities with greater consideration for visible and invisible disabilities, such as visual, auditory or physical impairments can provide greater access to jobs and mobility throughout cities.

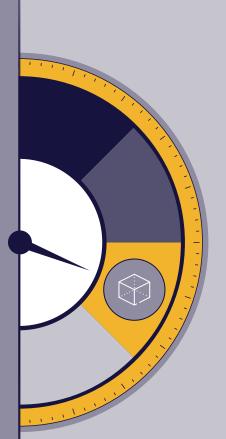


## SPATIAL INCLUSIVITY



54% of the world's population live in cities with inadequate or expensive public transport systems, underscoring the importance of accessible and affordable transit options for all residents.

Connecting the poorest communities to relevant, high-quality jobs via reliable public transportation can boost employment, private wealth, and social mobility.



## **ENVIRONMENTAL INCLUSIVITY**



**URBAN INCLUSION CAN HELP:** 

Europe loses **200 million** working days per year to air pollution-related illnesses.

Through maintenance of green open space, restriction of private car transportation and a focus on shared, **green mobility** such as bikes, air quality can improve.



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# THE CRITICAL ROLE OF THE REAL ESTATE INDUSTRY

## CREATING A ROADMAP TO SOCIAL VALUE THROUGH RESPONSIBLE REAL ESTATE

ALONGSIDE GOVERNMENT, THE REAL ESTATE AND CONSTRUCTION SECTORS ARE AMONG THE MOST CRITICAL CUSTODIANS OF THE BUILT ENVIRONMENT, INFLUENCING THE DEVELOPMENT, MANAGEMENT, OCCUPATION AND STRATEGIC PLANNING OF CITIES.

Every day, the industry makes decisions about what gets built, for whom, and the form and function of amenities and spaces. As a result, these industries have the obligation to ensure that what gets built, serves all citizens.

Given the magnitude and scope of what drives Inclusive Cities, it is easy to become overwhelmed by their scale and complexity. However, the starting point is more straightforward – to recognise inclusiveness as an asset, not a cost.

From there, developers, investors, and occupiers must embrace the responsibility of ensuring that their assets are created and operated with inclusive principles. While there are myriad opportunities to improve the inclusivity performance of a city, here we focus on the role of core office employment hubs.





#### **DEVELOPERS AND INVESTORS**

OFTEN WORKING HAND-IN-HAND WITH ARCHITECTS AND CITY PLANNERS, DEVELOPERS AND INVESTORS ARE AT THE FOREFRONT OF DECIDING WHAT GETS BUILT, HOW BUILDINGS WILL BE USED, AND AS A RESULT HOW THE SHAPE OF THE CITY WILL TAKE PLACE.

In cities that are further along their journey of social inclusion, there are likely to be stronger policy frameworks that outline roles and responsibilities between these actors. In cities that are less mature in their development of urban inclusion, developers and investors may need to take the lead, which should be factored into project feasibility modelling. Therefore, successful collaboration between city municipalities, developers, and investors can lead to economies of scale, and creating more inclusive environments for all.

Whilst (re)development is undertaken with the end user in mind, the occupant, there are many stakeholders to a building in addition to end-users, including citizens and people who live close to or walk past these buildings every day. The impact of development on these people should also be considered as stakeholders, with the objective being to maximise their benefits in any project delivery.

Through participatory design approaches, developers can accommodate more nuanced and inclusive needs of a broader range of stakeholders. For example, retaining outdoor green public space within a city centre rather than developing, can preserve outdoor green space as a public park. This allows children and adults to build connections, exercise, and enjoy a space that also helps reduce pollution.

From an investment perspective, developing social as well as economic value will influence total returns, through decreased vacancy rates, void periods and increased rental income through desirable rentability. In addition, more nuanced sources and models of financing also provide opportunities to construct innovative financing structures that benefit both social and economic returns.

## **DEVELOPER/INVESTOR CHECKLIST**



#### LOCATION

- WORK WITH LOCAL RESIDENT GROUPS to ensure that longer-term, downstream risks and consequences of occupation for the wider community are managed
- **CREATION OF A DESTINATION** for multiple user types (professionals, citizens, visitors)
- DESIGN BETWEEN SPACES AS 'CORRIDORS' for passers-by
- IMPROVE OR CONTRIBUTE to local amenities, supporting local businesses
- ACCESS TO GREEN OUTDOOR SPACE that promote community stewardship
- DEVELOP PLACEMAKING and experience within the immediate vicinity
- **ENSURE PROXIMITY** to public transport infrastructure, ideally green transport
- **IMPROVE WALKABILITY** through vehicle-free areas
- SUPPORT IN DEVELOPING TALENT within the local labour pool
- **DESIGN FOR SAFETY** including physical and emotion safety, as well as safety through wayfinding
- INNOVATIVE FINANCIAL STRATEGIES that return capital gains to social projects
- Access to SOCIAL FINANCING SOURCES



#### BUILDING

- **CREATE PLACES** that inspire and represent the city's identity through cultural arts
- **PROMOTE GREEN AND BIOPHILIC** design to promote human and ecological health
- CULTIVATE A SUPPLY CHAIN that provides jobs to local residents
- **DEVELOP MIXED-USE ASSETS** to increase safety and reduce crime
- CONSIDER THE SAFETY AND EXPERIENCE of transition spaces, such as alleyways
- **BE 'HUMAN-FIRST'** with a focus on health and wellbeing through certification
- ENGAGE IN PARTICIPATORY DESIGN to ensure inclusive and accessible design for all inhabitants
- CONSIDER MATERIALITY and the effect of senses, temperature, light, and sound

This is an example based on an office typology. Further examples for other asset classes and stakeholder groups are available within Cushman & Wakefield's 'Reworking the Workplace Companion Guide" available on our website.

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#### **CORPORATE OCCUPIERS**

SIMILARLY, CORPORATE OCCUPANTS OF REAL ESTATE CAN ADD SIGNIFICANT SOCIAL VALUE TO THE COMMUNITIES THEY INHABIT WHILE SIMULTANEOUSLY ENHANCING THE SOCIAL AND INCLUSIVE EXPERIENCE FOR THEIR EMPLOYEES.

By supporting local businesses within their supply chain or recruiting from local citizens, corporations can promote social value and economic growth within the communities in which the operate. Further, creating community development plans, such as making lobby or office space available to students, social entrepreneurs or charities during times of underutilisation, can provide much needed support to the local community.

Additionally, companies can enhance the social value to employees at the macro level by selecting to operate from specific cities across EMEA that will facilitate a way of life desirable for employees, and at a more micro level by choosing buildings that are well connected via public transportation to accessible high quality, affordable housing with strong access to healthcare and educational facilities, such as daycares and schools. These effects are likely to improve the quality of life of employees and as a result generate increased engagement and organisational performance.

## RESPONSIBLE REAL ESTATE BUILDS MORE RESILIENT CITIES AND BUSINESSES.

ENGAGING IN SOCIALLY RESPONSIBLE REAL ESTATE PRACTICES NOT ONLY ENHANCES COMMUNITY SOCIAL VALUE BUT ALSO FOSTERS LONG-TERM ECONOMIC SUCCESS BY BUILDING MORE RESILIENT AND VIBRANT NEIGHBOURHOODS.

### **OCCUPIER CHECKLIST**



#### LOCATION

- CONSIDER EMPLOYEE NEEDS OUTSIDE OF THE
   OFFICE, such as connectivity and use of restaurants,
   entertainment, retail, daycares, schools and healthcare
   facilities
- **CONNECT WITH LOCAL COMMUNITY MOVEMENTS** to foster connection between citizen and private businesses
- WORK WITH LOCAL RESIDENT GROUPS to ensure that longer-term, downstream risks and consequences of occupation for the wider community are managed
- CONSIDER TRAINING AND DEVELOPMENT
   OPPORTUNITIES for local residents
- CREATE DESTINATIONS FOR CITIZENS AND OCCUPIERS to come together through cultural, learning or social events
- ENSURE ALL STAFF CAN ACCESS THE BUILDING VIA

  PUBLIC TRANSPORTATION with equitable time and cost
- PROVISION OF GREEN TRANSPORTATION, such as access to bikes and cycle paths
- **PROMOTE EXERCISE AND HEALTH** through site selection and access to outdoor space

This is an example based on an office typology. Further examples for other asset classes and stakeholder groups are available within Cushman & Wakefield's 'Reworking the Workplace Companion Guide" available on our website.



#### **BUILDING AND FIT OUT**

- PROMOTE HEALTH AND WELLBEING through local or onsite amenities
- Provide spaces to PROMOTE MOVEMENT, adoption of different postures for relaxation
- PROVIDE A DIVERSE RANGE OF WORKPLACE
   SETTINGS to provide inclusive spaces for diverse
   environmental needs, such as introverts, people
   with concentration challenges.
- **DESIGN FOR ALL SENSES** e.g., colour, sound, light, movement, navigation, touch, smell
- **PROVIDE A VARIETY OF FURNITURE** to suit different styles of working, i.e. stand-sit desks, saddle chairs, medicine balls, booths or bench desks
- CONSIDER PERSONALLY CONTROLLED DESKS to manage different temperature and light needs
- IMPLEMENTATION OF CIRCADIAN LIGHTING to promote improved sleep, and associated health benefits
- SHOWCASING OF LOCAL ARTISTS to celebrate local and diverse cultures
- **ENSURE ADEQUATE WAYFINDING** for a range of visible and invisible limitations
- ENSURE INCLUSIVE IMAGERY USED THROUGHOUT

  THE BUILDING that represent a diverse mix of employees

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## CALL TO ACTION

AS THE INCLUSIVE CITIES

BAROMETER REVEALS, MANY

CITIES ARE CHARTING A COURSE

TOWARDS ACCOUNTING FOR THE

NEEDS OF ALL CITIZENS. THIS IS

DRIVING THE TRANSFORMATION

OF OUR URBAN LANDSCAPES.

We invite you to visit our website for further insights into each city featured in this report, offering valuable guidance on building roadmaps for social value creation. Whether you are an investor, developer, or occupier, Cushman & Wakefield stands ready to support you in maximising social value through your real estate endeavours.



AS ACTIVE
CUSTODIANS
OF THE BUILT
ENVIRONMENT,
WE MUST
NEVER NEVER
SETTLE FOR
THE WORLD
THAT'S BEEN
BUILT, BUT
RELENTLESSLY
DRIVE IT
FORWARD.



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## TAKE THE NEXT STEP



Our teams utilise the Inclusive Cities Barometer data to advise clients on their real estate strategies.

WE CAN ALSO
HELP YOU CREATE
POSITIVE SOCIAL
VALUE IMPACT
THROUGH EACH
STAGE OF YOUR
REAL ESTATE
LIFECYCLE,
FOR EVERY
STAKEHOLDER
WHO ENGAGES
WITH YOUR
SPACES.

#### **STRATEGY**

We help you Identify stakeholders, set goals and drive positive social impact.

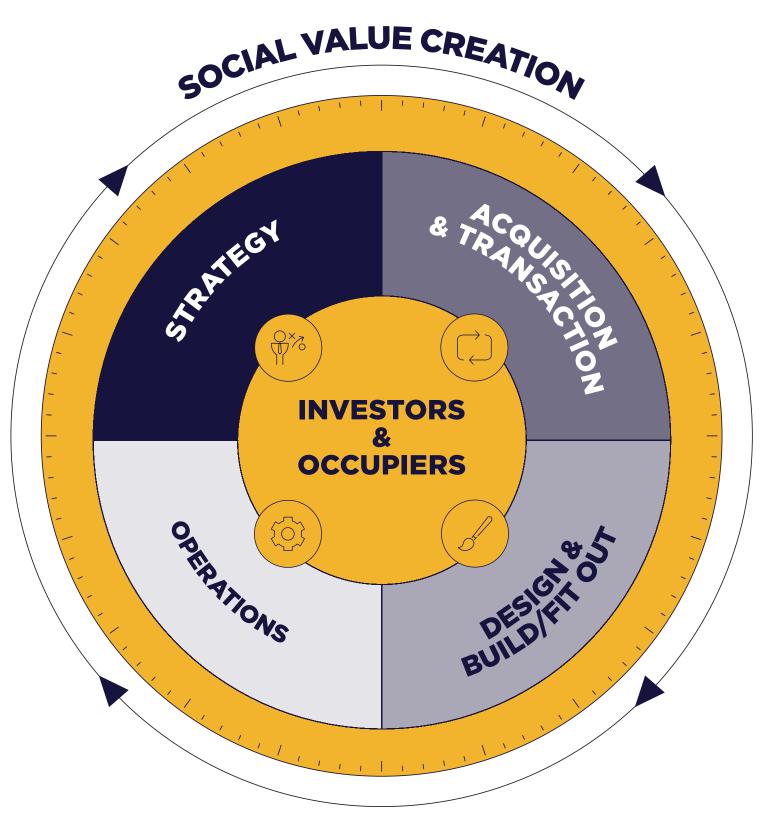
- Social value vision and strategy setting
- Target setting, measurement, reporting and governance
- Objective setting in fund, portfolio creation and launch
- Workplace and public spaces placemaking and inclusive design

### **OPERATIONS**

We drive social value creation in standing portfolios and assets on a day-to-day basis.

- Community engagement plans
- Customer and tenant experience enhancement
- Data collection, management and reporting
- Ethical and responsible sourcing policy and process
- Real estate social value index (RESVI) benchmarking
- Workplace and asset certification

   (i.e. WELL, Fitwel, BREEAM and LEED)



## **AQUISITION**& TRANSACTION

We integrate social impact into your investment decisions.

- Capital advisory for impact investing
- Capital and valuation advisory for repurposing and repositioning assets
- Occupier insights on social value to inform retention planning and workplace strategy
- Alignment of ESG goals in lease negotiation
- Location analysis / labour force analysis

## **DESIGN BUILD/FIT OUT**

We embed social value in your design and build practices.

- Social value vision and strategy setting
- Target setting, measurement, reporting of social value during build and fit out
- Ethical and responsible procurement practices
- Social value optimisation in capital works
- Workplace and asset certifications

   (i.e. WELL, Fitwel, BREAM, LEED and RESVI)



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## APPENDICES

#### **METHODOLOGY**

A COMPREHENSIVE REVIEW OF DATA AND PEER-REVIEWED ACADEMIC LITERATURE WAS CONDUCTED TO CREATE THE INCLUSIVE CITIES BAROMETER FRAMEWORK.

This resulted in the identification of 110 variables, which were then categorised into four main dimensions and 11 sub-dimensions. All data was sourced from reputable open-source platforms and was consistent across all cities.

Cushman & Wakefield aggregated the data to create a unified model and rated each variable based on how it denotes inclusion, whether by a higher score, lower score, closeness to a mean or average, or a bespoke deviation from another metric. The weighting of variables was based on their effect size and contribution to the overall model, adjusted for a focus on social and spatial inclusivity. Cities and variables were included where at least 70% of all local data was available. In cases of missing data, alternative sources were identified and incorporated into the model using a Z-score to normalise new data points into the existing data distribution.

Together, these cities account for 85% of European office space tracked by Cushman & Wakefield, covering the majority of corporate occupier portfolio locations.



### **LIMITATIONS**

## THE METHODS AND INDICES USED IN THIS STUDY HAVE SEVERAL LIMITATIONS THAT WARRANT CONSIDERATION.

Not all European cities were included in the analysis, which was due to inconsistent data availability. The barometer is, therefore, interpreted only relative to the cities considered. It is also acknowledged that different weightings between dimensions and sub-dimensions can influence specific results. However, it should be noted that sensitivity testing showed no significant impacts on overall ranking results.

The data used in this study is at the city or national scale and did not consider distribution of inclusivity within cities. As a result, it does not measure urban segregation, a critical component of social inclusivity. Furthermore, some desirable data, such as deeper data on disability access, was unavailable or inconsistent across cities.

Finally, the use of objective data does not capture the human experiences of living within these cities, thereby offering only a partial understanding of inclusivity. It is essential to recognise that while these cities may rank higher or lower according to the Barometer scores, this may not fully reflect the experience of all inhabitants or those unable to reside there for various reasons.

