SUCCESSFULLY GROWING AUCKLAND AT PACE AND SCALE

PROGRESS UPDATE TO LEADERS IN THE HOUSING SECTOR – MAY 2018

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1. BACKGROUND

- The **Chief Executives Group for Auckland (CEGA)** agreed on 22 August that it was necessary to determine whether there are any special operational and system changes that would increase the delivery of residential development and supporting infrastructure at pace and scale. This project would take all current initiatives as a starting point, and determine whether there are further system or agency specific actions that could be taken.
- The operationally-focussed project is sponsored by CEGA with a working group from Auckland Council, Treasury, Panuku Development and MBIE, and involvement from a wide range of agencies including Auckland Transport, NZ Transport Agency, Housing NZ, HLC, Watercare, Vector, Ministry for the Environment and the Ministry of Education.

2. WORK TO DATE

1. **Investigation of constraints and opportunities:** We have held 32 interviews with council and central government entities, infrastructure providers and the private sector (property and land developers, financier and contractor organisations). Collectively the interviews provided different perspectives on what was working well, what key constraints existed and what more could be done to help increase Auckland's growth at pace and scale. We supplemented the interviews with findings from relevant reports and investigations.
2. **Validation of findings and establishment of community of interest:** We presented the findings to a workshop of over 60 representatives from central government agencies, Auckland Council and its CCOs, infrastructure providers, large professional services firms and Infrastructure NZ. The workshop validated the key constraints and opportunities identified to date and there was general agreement for the group to form a community of interest around growth management and urban development to help take those opportunities forward.
3. **Prioritisation of additional initiatives: F**ollow-up workshops were held in December and May to identify and agree on additional short and medium term initiatives to supplement existing work on increasing the pace and scale of Auckland's residential build and supporting infrastructure.

3. STRATEGIC ALIGNMENT: WHAT KIND OF GROWTH IS 'SUCCESSFUL'?

There are a myriad of definitions and statements of 'good growth'. Here are some of them;

- Successful growth will help to achieve the environmental, social, economic and cultural goals set out in the Auckland Plan. MIXED RESULTS AT PRESENT
- Specifically, successful growth will support an urban form that facilitates access to employment, education, commerce, community and social services and amenities. MIXED RESULT
- Successful growth avoids damaging supporting natural systems, as well as natural and social capital – as set out in numerous policies and plans. MIXED RESULT
- In economic terms, the marginal benefits of growth should exceed the marginal cost, and growth should lower (not increase) the long-run operating cost of the city. NEGATIVE RESULT
- *And the supply of housing, commercial premises, network and social infrastructure should in general meet demand i.e. not result in lower levels of service.* NEGATIVE RESULT

Focus of this initiative

4. PROBLEM STATEMENT: AUCKLAND'S GROWTH HAS EXCEEDED SUPPLY IN KEY AREAS

- Auckland has added around 180,000 people (a Hamilton) since amalgamation in 2010, and the supply of housing, transport, education, health and other key services have struggled to keep pace – resulting in house price inflation, overcrowding, congestion and other reductions in levels of service.
- Such 'unsuccessful' growth management reduces the economic productivity of Auckland as well as its amenity and liveability.

  "The positive forces and benefits associated with a city are being outweighed by negative impacts of growth. Environmental, housing and transport indicators all reflect a city under increasing pressure" (Treasury's Auckland Story, August 2017).
- And more growth is coming: housing demand is assessed to be between 350,000 and 410,000 new households from 2016 to 2046 (Statistics NZ medium and high population forecasts respectively).

5. EMERGING CONSENSUS: AUCKLAND IS STRUGGLING WITH PACE AND SCALE

The reason is (of course) complex but it seems to boil down to 7 key factors:

1. High input costs (land, labour, supplies, materials).
2. Low productivity, especially in the housing sector.
3. Low financial/equity/funding capacity in the local government, housing construction and residential developer sectors, while central government funding systems have a conservative bias that leads to under-investment.
4. Lack of collaboration and integration between many key delivery agencies, including sharing of innovative solutions and proven practices
5. A misallocation of risks and rewards between the Crown, Council and private sector entities.
6. A capability and capacity shortage across many agencies and firms at planning, commissioning, project management and construction stages.
7. Market-led versus plan-led residential development which is forcing infrastructure investment to be spread too thinly across region.

6. THERE HAS BEEN LOT OF EFFORT TO ADDRESS THESE ISSUES

- ✓ The Auckland Unitary Plan – near universal agreement that's it's a key asset.
- ✓ The Future Urban Land Supply Strategy, greenfield growth and structure planning .
- ✓ Most area plans and network development programmes are now in place e.g. HNZC/HLC, TRC, Panuku, Education, Watercare, NZTA-AT, ADO, catchment planning etc.
- ✓ Some strong community, mana whenua and developer partnerships have evolved.
- ✓ Increased interest and commitment from central and local government entities to integrate, coordinate and collaborate.
- ✓ Increased funding signalled to match demand in some key areas (mainly central government).
- ✓ Some innovative planning, consenting, programme development, investment decision-making , funding , surplus land disposal and procurement approaches have been adopted – all making a difference.
- ✓ Recent investments have generated sufficient capacity to meet growth/demand in some areas e.g. electricity in general, Western Ring Route etc.

And there is now the evolving housing & urban development work programme which will also increase pace and scale

7. BUT MORE IS NEEDED TO INCREASE PACE AND SCALE

The list of additional recommended solutions (and arguments for and against) is very long. Whilst much has already been tried – with some notable successes – the search continues for truly transformative solutions as incremental improvements are no longer sufficient. What all the many reports and personal opinions appear to boil down is that increased pace and scale will require fundamental changes such as:

1. A narrower **strategic focus** e.g. fewer development areas/fronts.
2. Significantly **better integration and coordination** of planning, programming, procurement and delivery.
3. Urgently **scaling up** in many key areas: land, labour, materials, organisational capacities.
4. A much higher degree of **standardisation** of houses, schools, libraries, police stations etc.
5. Shifting some **risk and liability** from Council to the Crown and private sector, to better match returns from growth.
6. Increased **funding and financial** tools to the Council and developers - to help unlock development potential.

8. INITIATIVES NOW UNDERWAY

1. Strategic focus	2. Integration, coordination and streamlining	3. Scaling up	4. Standardisation	5. Risk & liability	6. Funding & financial tools
• A joint Auckland spatial development strategy • Auckland-Hamilton corridor plan [NEW] • A joint Auckland data hub to underpin strategy and demand forecasting for all key public services [NEW] • NPS on Urban Development Capacity – completing assessments • Pro-growth planning tools [NEW]	• A revised streamlined and more integrated approach to structure planning • Resource Management Amendment Act 2017 • Consenting Made Easy • Auckland Development Programme Office • A joint central-local government infrastructure and housing programme for Auckland [NEW]	• KiwiBuild [NEW] • A national urban development authority [NEW] • Auckland Housing Programme • Crown Land Development Programme • Sector Workforce Engagement Programme • Attract new development and construction firms • Investigate other mechanisms to enable new tenure and ownership models to fill gaps between social housing and market-rate housing [NEW]	• KiwiBuild	• Building regulation and sector performance review • Rebalance liability through exploring methods including: capping BCA liability; investigating building warranty and insurance schemes; introducing a self and/or private certification schemes [NEW]	• Housing Infrastructure Fund • Crown Infrastructure Partnerships • New funding and financing tools for Council [NEW] • Greater use of targeted rates • Greater use of infrastructure funding agreements

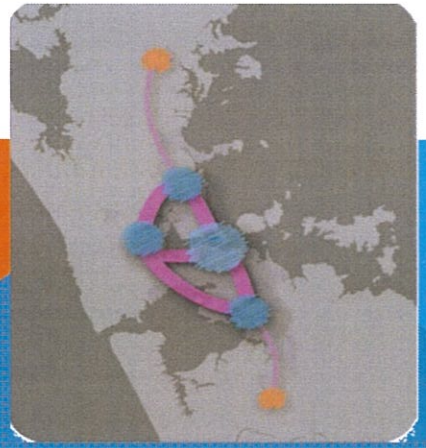
Invest directly and partner	
KiwiBuild affordable housing	Deliver 100,000 houses for first home buyers over 10 years
Establish the Housing Commission (UDA)	Undertake 10-15 large-scale urban development and regeneration projects
Increase public housing supply	Warm, dry, secure state and public housing is available to those who need it
End homelessness	*Invest in Housing First and Transitional Housing*
Invest in Infrastructure	*Support better urban growth through HIF, CIP, ATAP Update, RTN, Regional Rail etc.*
Support whānau, hapū and iwi Māori needs and aspirations	*Maximise opportunities to partner with Māori in the delivery and development of housing, and ensure the housing needs and aspirations of Māori are met*

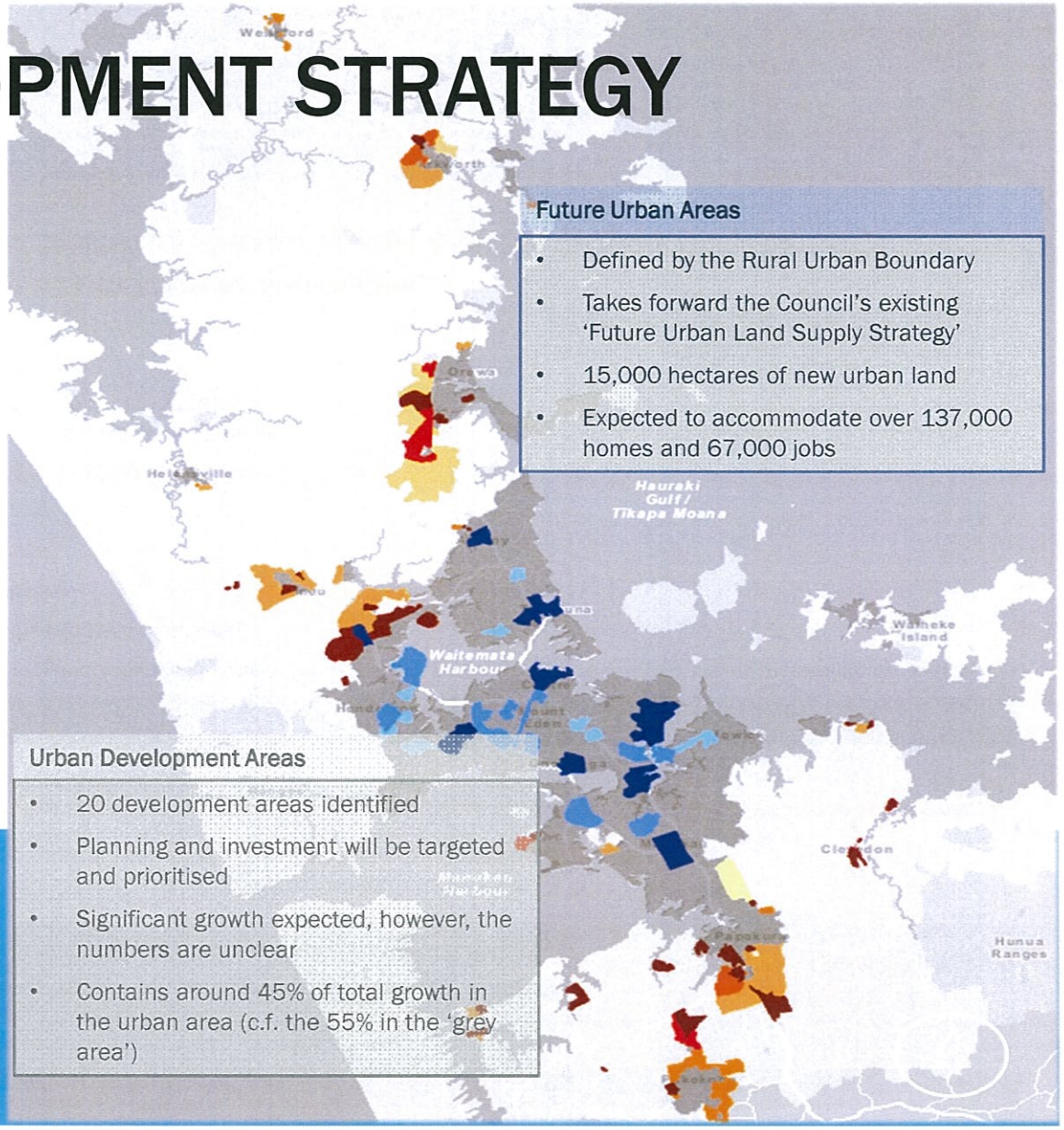
Transform the system settings	
Urban Growth Agenda	Deliver medium to long-term changes to create the conditions for the market to respond to growth, through five pillars : • Infrastructure Funding and Financing • Pro-growth planning • *Transport pricing* • Auckland Development Strategy and Spatial Plan • *System coherence and legislative reform*
Improve building and construction regulatory system and skills	Improve consenting processes, support the use of more innovative and productive building techniques and materials, and address issues with the liability system *Construction Skills Strategy* *KiwiBuild Visas*
Make life better for renters	*Healthy Homes Guarantee Act, RTA Review, Ban letting fees*
Manage demand for housing	*Overseas buyers legislation, bright-line extension, loss ring-fencing, Tax Working Group, immigration settings*

THE DRAFT DEVELOPMENT STRATEGY

Key Components

- Outlines the timing and sequencing of growth across Auckland over next 30 years:
  1. Redevelopment and intensification
  2. Establishing new communities (greenfields)
  3. Create flexible and adaptable business areas
  4. Limit growth in rural areas
- Proposes a 'Multi-Nodal' growth model
  - City centre continues as the focus
  - Substantial growth in north, north-west and south
  - Connected by efficient transport links
  - Two rural nodes (or 'villages')
- Introduces new 'Urban Development Areas'
- Consolidates the existing 'Future Urban Areas'
- These growth areas have significant infrastructure requirements (which are not fully funded)





Future Urban Areas

- Defined by the Rural Urban Boundary
- Takes forward the Council's existing 'Future Urban Land Supply Strategy'
- 15,000 hectares of new urban land
- Expected to accommodate over 137,000 homes and 67,000 jobs

Urban Development Areas

- 20 development areas identified
- Planning and investment will be targeted and prioritised
- Significant growth expected, however, the numbers are unclear
- Contains around 45% of total growth in the urban area (c.f. the 55% in the 'grey area')

WHAT IS kiwibuild

100,000 AFFORDABLE HOMES FOR FIRST HOME BUYERS

Delivery

- Four main delivery channels:
  - Existing development programme (HNZC, HLC, TRC)
  - Land for Housing programme
  - Underwriting developments ('buying off the plans')
  - Large scale development (including through UDA)
- It is likely that in certain developments, a combination of different KiwiBuild tools will be used in order to achieve the best outcomes

Criteria and eligibility

- Proposed target price points up to $650k in Auckland and $500k elsewhere
- First home buyers or 'second chancers' in equivalent position
- New Zealand citizens or permanent residents
- No income cap
- Definition of a KiwiBuild Home:
  - Priced at or below the relevant KiwiBuild price cap
  - Sold, or offered in the first instance, to an eligible purchaser
  - Approved by the KiwiBuild Unit for entry in a KiwiBuild register

Outcomes framework

- Core KiwiBuild Objectives:
  - Deliver housing that is more affordable *(while meeting quality and regulatory standards)*
  - Support thriving communities *(access, diversity, choice)*
  - Increase capacity and productivity in sector (*so that Government can eventually exit*)
- Achieve wider government objectives:
  - Economic, Environmental, Social, Regional
  - Need to balance delivery of core KiwiBuild objectives with broader objectives
  - Co-benefits are important

Role of the KiwiBuild Unit

- Approved by Cabinet in December
- Located within MBIE
- Policy development and monitoring
- Focus on building sector capability
- Partner and collaborate effectively with other government delivery agencies
- Will transition to Housing Commission

Approach to partnership and risk

- Need to leverage private and other capital
- Transfer of risk on a case by case basis
- Support the sector to grow
- Other parts of government, local government, iwi and other market players will be important in the delivery of KiwiBuild
- Consideration of alternative purchasers, to manage demand risk

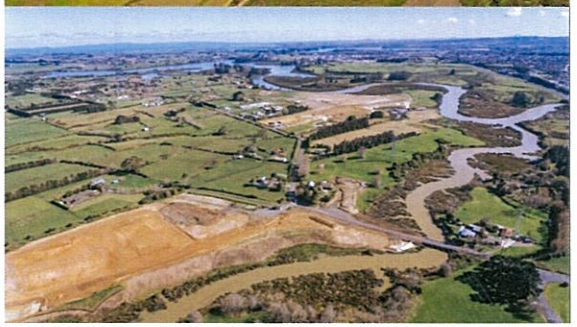
CROWN INFRASTRUCTURE PARTNERS

Investigating and implementing commercial models to invest $600m, including those that will enable co-investment from the private sector or any other sector, to achieve the Government's objectives for the deployment of water and roading infrastructure to support a timely increase in housing supply.

Development Agreements will require housing or employment development in exchange for fast-tracking infrastructure

Stage 1 projects in the North and the South currently being explored

Stage 2 packages of work to be scoped through 2018



Crown Infrastructure Partners

Auckland Council
Te Kaunihera o Tāmaki Makaurau

9. ADDITIONAL INITIATIVES?

Strategic focus	Integration, coordination and streamlining	Scaling up	Standardisation	Risk & liability	Funding & financial tools
	• **Set up a joint (virtual or physical) urban management office to integrate and coordinate the delivery of housing, network and (selected) social infrastructure.** • Agencies collectively create a joint pipeline of investments and joint panels. Agencies seek to aggregate up contracts and build in productivity performance measures. • Create a centralised database & joint administration for Crown land.	• Centralise and scale up construction market training initiatives and leverage industry based training through public procurement. • Attract greater overseas investment, large scale developers and construction sector related skills.	• Stronger coordinated 'push' for 'modularisation' for public and private housing – using a national compliance pathway if needed. • Adopt more standardised (less bespoke) designs for public housing, schools, libraries, stations and similar network and social facilities. • All agencies consistently adopt standardised streamlined approaches to business case development, and undertake joint area-based business cases where appropriate. • All agencies consistently review their operations and culture to reduce unnecessary gate keeping, and delays to decision-making.	• Increase use of national standards for building materials & a national building materials product register.	• Explore merits of basing ratings on land value as opposed to capital value and explore targeted rates more aggressively.

10. NEXT STEPS

- The project has been effective in engaging all the key central and local government agencies that deliver network and social infrastructure in Auckland into a single discourse, perhaps for the first time. It has also reached out to the private developer and professional services sectors.
- The interest in greater levels collaboration, integration and coordination in demand forecasting, strategic planning, service design, business case development and procurement is very encouraging , as is the interest in learning from each other in terms of delivering at pace and scale
- For these reasons we have extended this project into 2018 and focus it on these four objectives:
  1. To maintain and build the established network and community of practice to support Government and Council initiatives around growing Auckland at scale and pace
  2. To promote good and shared practice in urban management within an increasingly connected network/community *e.g. Treasury has offered to hold workshop on business case development under urgency and at scale*
  3. To develop and (where required and agreed) support the delivery operationally-focused initiatives that improve pace and scale through more effective urban management (refer to *highlighted suggestions* on previous page)
  4. To contribute to and support system level changes from a delivery perspective e.g. KiwiBuild and the Urban Growth agenda

BACKGROUND: NOTES FROM PRE-WORKSHOP INTERVIEWS AND WORKSHOP PRESENTATIONS

11. PUBLIC SECTOR & INFRASTRUCTURE PROVIDERS PERSPECTIVES

- We held interviews with...
  - Council; Planning, Procurement, Consents, Strategy, Wai Ora
  - Auckland Transport, Panuku, Watercare
  - Vector, Transpower
  - NZTA, MoT, MoE, Treasury, MBIE, MSD
  - Housing NZ, HLC
  - Infrastructure NZ, Auckland Residential Property Council
- The interview insights are summarised on the following two pages...

What's working well

Increased collaboration
between public sector agencies, infrastructure providers, developers & iwi

AUP
Having a 30 year growth plan with zoned land

Plans that help integrate place based developments
Green field growth plans, Transport network plans for future urban areas, Framework plans, Structure plans, Catchment management plans.

Streamlined business case processes

Streamlined procurement
Aggregated contracts, supplier panels, pipeline of investments, leveraging training in construction sector

Streamlined consenting solutions
Consenting made easy, early collaboration with developers

Greater in-house capability and growing focus on delivering outcomes

Increased funding

Constraints to increasing pace and scale

Strategic growth planning
- Market-led development not aligned to planned network. investments – stretching capacity too thinly.
- Uncoordinated infrastructure planning & prioritisation.
- No single view of all activity in region.

Infrastructure
- Historic just-in-time investment not geared for high growth.
- Funding gap & council debt limits.
- Lengthy agency business case planning.
- Fragmented short term procurement.
- First mover developer pays bulk of cost.

Land
- Fragmented ownership.
- High land values.
- Land banking incentivised.
- Realising surplus Crown land too slow.

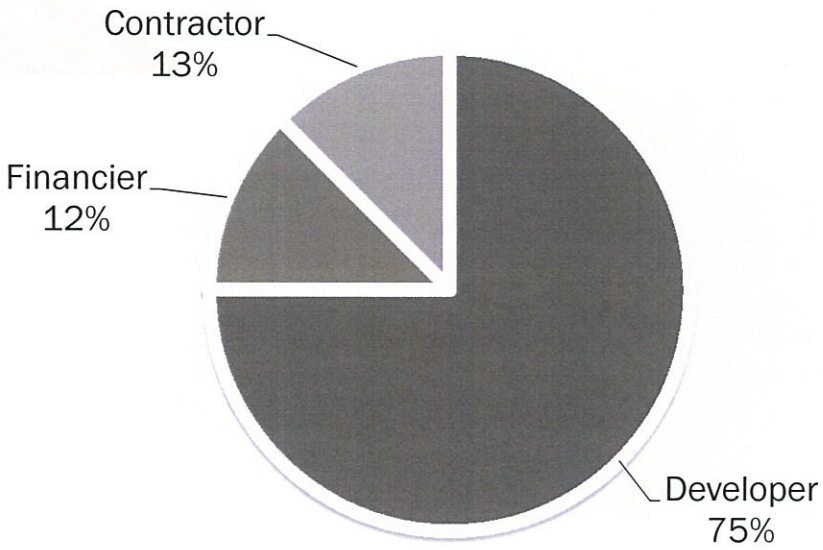
Planning & regulatory system
- Balancing multiple & often conflicting outcomes.
- Stretched capacity of skilled staff.
- Risk aversion due to liability allocation.
- Dis-incentivises innovation.

Development market
- Small market, few large players reducing competitiveness & capacity.
- Low margins.
- Banks tightened lend criteria reduced finance, increased prices and reduced med-high density development.

Community
- Existing licence to operate.
- NIMBYism.
- New dwellings too expensive for many households

Residential Construction sector
- Near/at/past capacity.
- Fragmented, unproductive,
- Cost escalation due to lack of scale & competition in building supplies & skills & labour shortages.
- Non compliance at low end of developer market.

12. DEVELOPER PERSPECTIVES



Organisations Surveyed

- We approached 16 Developer, Financier and Contractor Organisations, 8 surveyed over last month
- To consider current systematic obstacles and barrier as well as opportunities for improvement for Council and Government
- The feedback from the interviews is summarised on the following 5 pages

DEVELOPERS: OBSTACLES & BARRIERS TO DELIVER PACE & SCALE

- Skill and resource shortage across the board - consultant, contractor, subcontractor and building materials.
- High land price.
- Development and construction cost escalation.
- Long regulatory process – Resource Consent, s224(c).

DEVELOPER INITIATIVES TO SUPPORT PACE & SCALE

- Standardise processes and invested in staff
- Focus on repeatability and constructability
- Staged consenting process

DEVELOPER RECOMMENDATION FOR COUNCIL & GOVERNMENT TO SUPPORT PACE & SCALE

- Resolve the funding issues and provide better certainty on new bulk infrastructure
- Use financial incentives to encourage development in development ready land
- Invest in Council staff – training and experience
- MBIE to resolve Building Act issues through regulation – can achieve quick wins and low-risk
- Council to provide greater certainty of outcome and timing for consents – the market would pay more for consents if they knew they would be issued on time i.e. reduce holding costs.
- Virtually all developers are satisfied with Auckland Unitary Plan rules but would like stream mitigation rules to be revised and Building Act issues resolved

FINANCIER: OBSTACLES & BARRIERS TO DELIVER PACE & SCALE

- Loan to Value Ratio (LVR) restriction introduced in June 2016 has limited house buyer and investor access to capital without a deposit.
- Debt-to-income restrictions (DTIs) have been tightened over the last 3 years restricting buyer access to capital.
- Presale target increased from 75% of development loan value to 120% over the last 3 years. This has significantly increased actual number of section/homes presale for each development prior to able to access development finance.
- Some banks no longer accept presale to overseas buyer to be counted toward development loan presale requirement due to settlement risk.
- Limited applications for development in Brownfield with sufficient margin due to high land price, high construction cost and the housing market softening.

FINANCIER RECOMMENDATION FOR COUNCIL & GOVERNMENT TO SUPPORT PACE & SCALE

- Providing access to more skilled labour (such as from overseas)
- Working together with developer sector better, such as Council leading infrastructure provision for areas that are not infrastructure ready
- Faster consenting and compliance processes

13. SUMMARY NOTES FROM WORKSHOP PRESENTATIONS

13.1 Learning from disaster recovery, sport events and war memorials – *Dave Brash (DPMC)*

Key factors which made post event development move fast ...

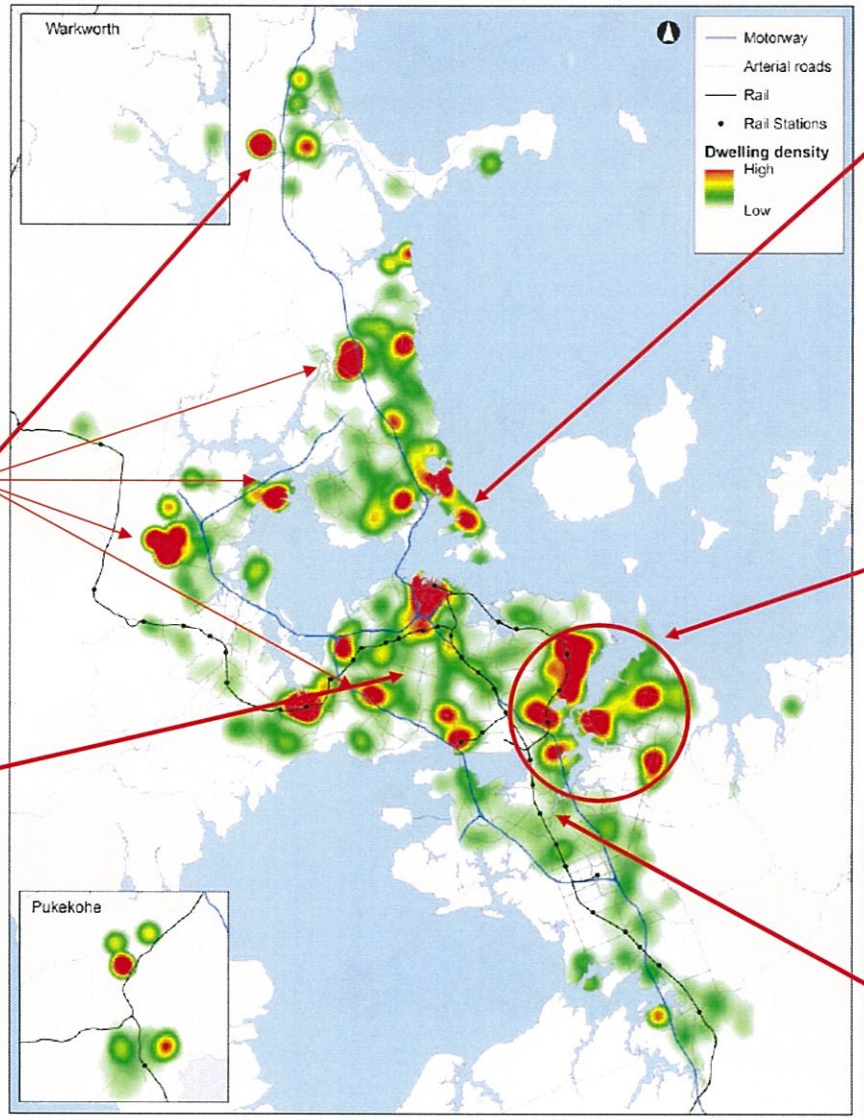
- **Political consensus.** Helped by co-ordination across e.g. joint briefings
- **Funding certainty:** Crown took risk otherwise would have taken years to get funding certainty over insurance claims. This allows parallel business planning and design to occur which accelerates process
- **Procurement:** Kaikora adopted an alliance model, shared risk with developers and built in internal productivity performance measures and held contractors to account. Used modular construction for Iron Bridge so it only took 14 weeks to build.
- **Consenting:** get clear agreement on the what then co design the finer detail. Eg could have had a 3 month delay waiting for seal pupping to end but co designed solution which created long-term improved environmental outcomes (new road design to protect colony and increased habitat). Was enabled by special legalisation to speed consenting process.
- **Legacy** – think about creating a legacy when working at scale.

13.2 Learnings from other jurisdictions – *Stephen Selwood (Infrastructure NZ)*

1. **Other international cites have common success factors**
   - Bold investment
   - Strong integration between infrastructure and urban development
   - Reached out for international capital
2. **Need identified pipeline of work** that ensures firms feel confident to scale up (not scale down as is common here) - and attract overseas developers. Scaling up will lift productivity, increase staff training and possibly reduce risk aversion which leads to sub-contracting and the fragmented nature of sector.
3. **Constraint** – large overseas developers e.g. Australia and Chinese don't think its worth their while to invest in NZ as scale not big enough.
4. **Fewer development priorities** e.g. focus on a satellite city the size of Christchurch to south with express rail services.

Map extract from Hearings Panel Recommendations Report

Unitary Plan creates serious infrastructure challenges for Auckland – if fully implemented



Significant intensification is allowed in Takapuna, Belmont and Northcote adjacent to heavily congested Lake, Esmond and Onewa Road corridors.

High density is permitted in motorway dependent locations.

Biggest areas of intensification are on the east surrounding the Tamaki Estuary but:

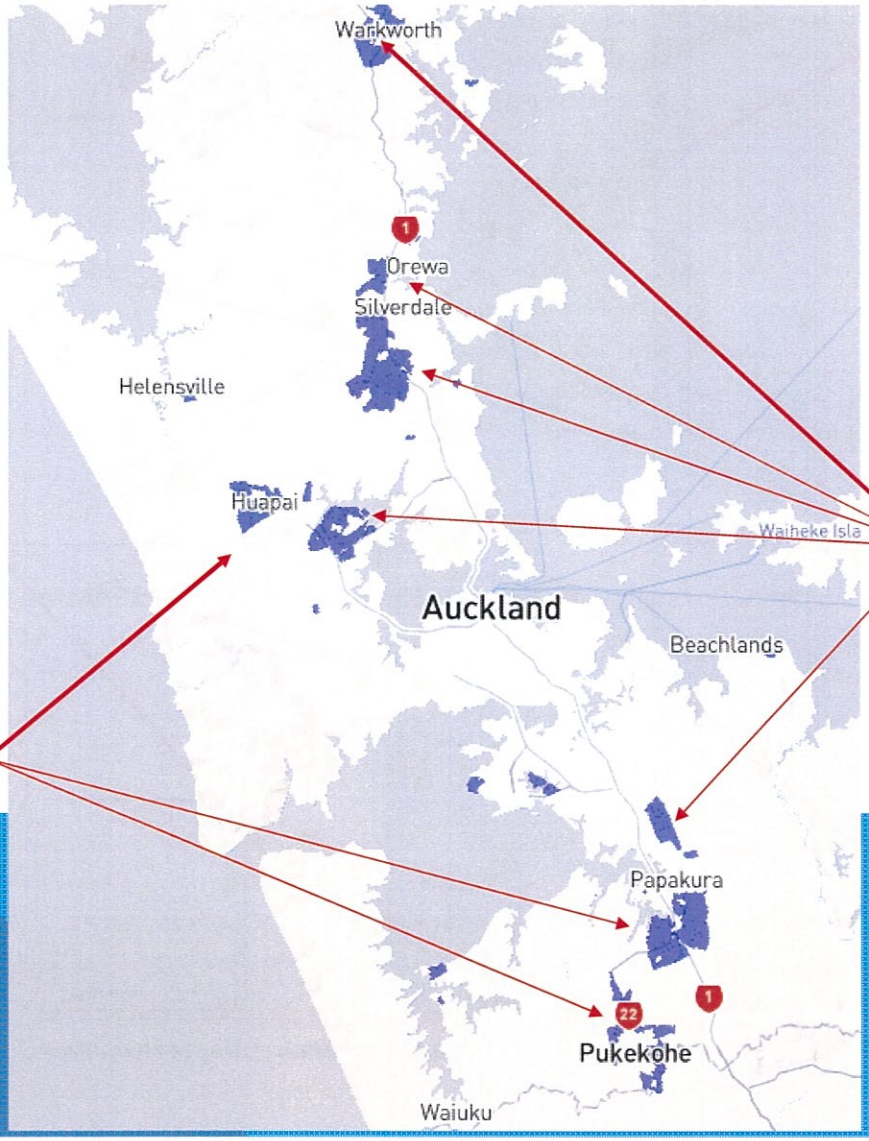
- Little additional road capacity is envisaged.
- The planned East West Link does not connect to the eastern suburbs.
- The Auckland Manukau Eastern Transport Initiative provides a dedicated busway on Ti Rakau Drive from Botany to Panmure but greatest intensification is planned for the Pakuranga Highway Corridor that doesn't have a dedicated PT service.
- While Tamaki and Mt Wellington are both located near train stations – ideal for city workers – employment centres in Penrose, Southdown, East Tamaki and the Airport, where many, if not most Tamaki residents will work, are poorly served by rail and roads are heavily congested?

Low density adjacent to proposed light rail corridors fails to capitalise on the potential of investment in light rail

Density and rail needs to be much better integrated

No high density development is allowed along almost the entire length of the southern railway line rapid transit corridor.

Future Urban Areas north, west and south will increase trip length and exacerbate congestion on the north, south and western motorway corridors.



Future urban areas are planned adjacent to rail but the rail network will need to be electrified to support growth of this degree

Major future urban development areas provided in locations that are motorway dependent and not proximate to train stations.

This will place immense additional pressure on the motorway corridors.

While the North Shore busway can be extended to Silverdale, this will serve city bound commuters but not business or freight trips.

The extent of growth planned at Silverdale and Dairy Flat will require Penlink and motorway widening to be accelerated to provide adequate transport capacity.

Additional capacity will also be required on the Southern and North Western motorways.

INTEGRATED URBAN DEVELOPMENT AT SCALE

Tested "city of 100,000" – additional to plans
= 30,000 high/medium/low density homes
= 30,000 jobs

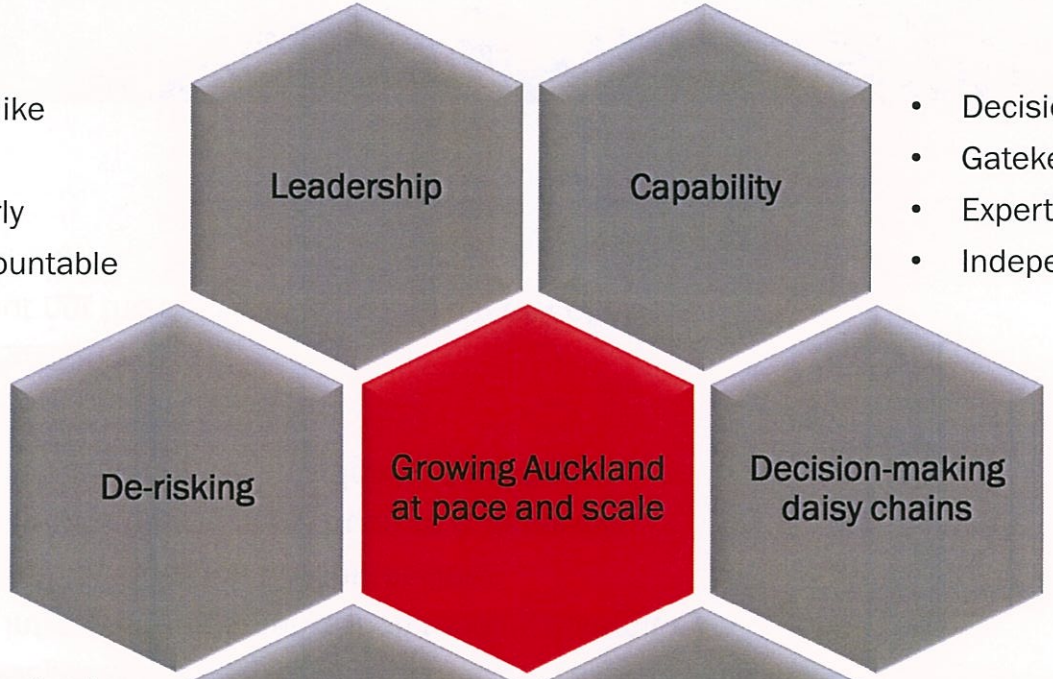
Greenfield = scale, speed, cheap land

- 180m2 Homes for $700,000
- Including the cost of infrastructure

13.3 Learnings from working across all key sectors and development stages – *Graham Spargo (Beca)*

- **Critical to focus on the people and organisational culture.**
- **Right sizing the effort we put into decisions.** We often put too much time into a decision. Often there is a lack of urgency or risk aversion in making a call. Personality types and organisational structure can be a constraint if too many risk averse gatekeepers are in place who then slow the system down. Good leadership and an organisational culture that accepts imperfection is needed to address this.
- **Moving to collective approval versus daisy chain decision-making.** If one part of the daisy chain delays it can throw all the other parts of the process out. Can we find more ways to sweep up all the decisions together eg through a collective statutory approach.

WHAT WILL HELP?



- Knowing what 'good' looks like
- Right-sizing decision effort
- Multi-disciplinary inputs early
- Valuing time and being accountable

- Decision lens: Technocratic / managerial
- Gatekeepers or distributed understanding?
- Expertise - critical mass?
- Independent Quality Assurance?

- Harnessing the private sector to public good ends (UK examples)
- Cheque-book diplomacy
- Tools to deal with 'hold out' behaviour

- Time - work backwards from end
- Mandates
- Inter-agency issue resolution
- Embracing imperfection

- Principle of no 'losers for the greater good'?
- Hot house co-design
- Omnibus statutory processes
- Better funding / acquisition tools

- Change management
- Accountabilities for implementation
- Lens of LSI / Myers Briggs / Disc
- Hearts & minds: power / politics

NEXT STEPS

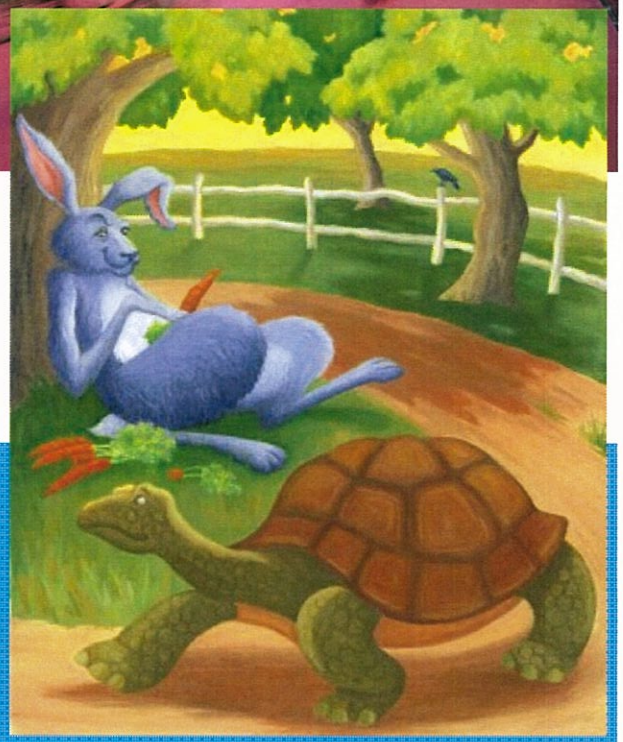
Spatial framework review – major opportunity

- ✓ Alignment of intent
- ✓ Remove 'optional adoption'
- ✓ Pan government & infrastructure organisation funding committed
- ✓ Senior leadership - implementation accountabilities
- ✓ Clarity - purpose & metrics for key infrastructure & gateways
- ✓ Fuller tool box for land assembly, acquisition and funding
- ✓ Business process improvement actions

Urban Development Authority

- ✓ Potential vehicle (but not the only way) to achieve many of above

13. 4 Mieszko Iwaskow, Aurecon

Successful project delivery at pace and scale requires:

1. A clear **bold vision** and **joint objectives** from partners
2. **Be very clear about role clarity** especially in cross agency projects
3. Time spent on **developing team culture**, partnership behaviour and relationships with stakeholders
4. **Innovation** e.g. scaling up components such as aggregated procurement