Shanghai Shikumen Heritage-Regeneration Lock-in: Drivers, Impacts, and Pathways toward Sustainable Urban Conservation—A Thematic Review

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DOI: https://doi.org/10.47772/IJRISS.2026.100900357

Received: 20 September 2026; Accepted: 25 September 2026; Published: 10 October 2026

ABSTRACT

The Shikumen Lilong, which blends Chinese and Western architectural styles, is the most representative form of residential heritage in modern Shanghai. For decades it has stood at the crossroads of historic preservation, housing improvement, property rights restructuring, and capital-driven redevelopment. This thematic review draws on 126 Chinese and English articles retrieved from the Web of Science and CNKI databases. Drawing on the theories of lock-in and path dependence, it examines how the conservation and regeneration dilemma of shikumen develops, what urban impacts it produces, and what pathways exist for sustainable regeneration. The review groups the driving mechanisms into four mutually reinforcing forms of lock-in: property rights and conservation institutions, land value and commercial capital, cultural symbols and city branding, and physical form and infrastructure. These forms of lock-in are not only multidimensional but also operate across multiple time scales. Together they produce four types of impacts spanning the sociocultural, economic, residential, and heritage domains, and the costs and benefits are distributed in a systematically uneven manner among original residents, new users, and the government and developers. Based on this synthesis, the review identifies five mutually supportive pathways: tiered holistic conservation, livability-focused renewal, controlled adaptive reuse, resident participation with community memory preservation, and multi-stakeholder governance. Breaking each form of lock-in depends on the coordinated action of at least two of these pathways. The review calls for an epistemological shift from viewing shikumen as "architectural specimens" to viewing them as "living heritage." This shift could turn shikumen from a steadily disappearing heritage burden into a model of inclusive, resilient, and culturally vibrant urban regeneration.

Keywords: Shikumen Lilong; heritage-regeneration lock-in; path dependence; urban regeneration; living heritage.

INTRODUCTION

Since the turn of the 21st century, the accelerating pace of urban renewal worldwide has rendered the preservation of historic residential heritage a widespread and pressing challenge (Mirzakhani et al., 2021; Vafaie et al., 2023). Driven by urban competitiveness, land-based fiscal revenue, and imperatives of cultural identity-building, traditional residential neighbourhoods that sustain the everyday lives of ordinary residents are often the first targets of redevelopment, with their physical form, social networks, and daily culture all at risk of simultaneous transformation (Chen & Zhang, 2021; Ye et al., 2021). The UNESCO Recommendation on the Historic Urban Landscape, adopted in 2011, stipulates that the conservation of historic urban areas must be coordinated with socioeconomic development, changes in spatial use, and the diversity of urban functions—a principle that is especially difficult to implement in rapidly urbanizing developing countries (Kırmızı & Karaman, 2021). The dilemma is particularly pronounced in China, where over the past three decades traditional residential types that embody vernacular urban life—including Beijing's hutong, Guangzhou's Xiguan mansions, the Lingnan Qilou arcade houses, and Shanghai's Lilong—have undergone large-scale demolition and physical restructuring, and have been swiftly replaced through the logic of real estate-driven renewal by commercial housing or by scenic "historic character districts" (Chen & Zhang, 2021; Ye et al.,

2021).

Among these embattled traditional residential types, the Shanghai shikumen Lilong stands out as one of the most representative, extensively studied, and fiercely contested cases. Recent studies define Lilong as a primary form of traditional residential neighbourhoods in central Shanghai and associate it with residents' daily activities, travel, and community life (He et al., 2022). The shikumen emerged in the late 19th century against the backdrop of foreign concession expansion and surging immigration. Drawing on the traditional Jiangnan dwelling as its structural core, it incorporates the block fabric of Western terraced housing and adapts to modern urban infrastructure, producing two or three stories of brick-and-timber construction, stone-frame doorways, and living spaces organized around a small courtyard; over more than a century it has shaped the urban fabric of modern Shanghai and served as the material foundation of Haipai culture (Zhai & Tong, 2024). Estimates suggest that at its peak about 9,000 lanes existed, accounting for more than 60% of the city's residential housing stock (Chen et al., 2022). Since the urban renewal wave of the 1990s, however, shikumen in parts of the central city have continued to disappear, and a persistent tension has emerged among demolish-and-rebuild approaches, static conservation, commercial reuse, and the preservation of community continuity (Den Hartog & Martínez, 2022; González Martínez, 2021a).

In response to these pressures, central and local governments have introduced a series of conservation and renewal policies. The 2009 Regulation on the Protection of Famous Historical and Cultural Cities, Towns, and Villages affirms the principles of authenticity and integrity in historical and cultural heritage and calls for proper handling of the relationship between socioeconomic development and heritage protection (State Council of the People's Republic of China, 2017). The 2015 Central Urban Work Conference further emphasized the need to retain the "genes" of a city, following which concepts such as "urban mending" and "organic renewal" have gained increasing prominence in Chinese discussions of regeneration of existing urban fabric (Li et al., 2023). However, institutional protection does not automatically translate into the protection of living spaces, and the dilemma facing shikumen lies precisely in the persistent tension between architectural protection, housing improvement, property rights restructuring, and capital-driven redevelopment (Xiao et al., 2025). This persistence can be understood through the concept of lock-in, a path-dependent process in which historical decisions, institutional inertia, market failures, and social and material realities reinforce one another (Eitan & Hekkert, 2023; Troje, 2023). The high-density terraced fabric formed during the concession era, the property rights restructuring and overcrowded living patterns after 1949, the market-based renewal paradigm since the 1990s, and the layered symbolism of Red Memory and Haipai culture together form the conditions that sustain the contemporary shikumen dilemma (Luo et al., 2022). Over time these neighbourhoods have become increasingly entangled with the city's property rights, cultural memory, and commercial capital (Jiang & Lin, 2025), forming what can be called a heritage-regeneration lock-in. In shikumen neighbourhoods that still serve a residential function, residents often find themselves caught between conservation requirements, housing improvement, property arrangements, and renewal-led development, facing aging infrastructure, unclear ownership, relocation pressure, and the gradual erosion of everyday culture (Cao & Tang, 2022; Xiao et al., 2021). The terraced brick-and-timber form, narrow lanes, and compact courtyards make it technically complex and financially burdensome to insert modern infrastructure or carry out comprehensive livability improvements (Yan et al., 2024) , and local governance has oscillated between strict protection, full demolition, and gradual upgrading because of complex ownership structures and cultural sensitivity (Gao et al., 2023). These mutually reinforcing dynamics set a trajectory that is hard to reverse without major intervention (Goldstein et al., 2023) , making the balance among heritage value, living conditions, everyday culture, and capital-driven renewal one of the core issues that current urban regeneration in China must confront (Jiang et al., 2025).

Existing research on shikumen has generated substantial scholarship in areas such as architectural typology, Lilong life, heritage protection, and commercial renewal, but these discussions are typically conducted within separate disciplines. Architecture focuses on the evolution of form, construction, and spatial organization (Yu et al., 2026) ; planning and urban studies examine renewal models, land development, and gentrification (Ping, 2026) ; heritage studies concentrate on authenticity, restoration strategies, and the ethical debates around museumification (Martínez, 2023) ; sociology and anthropology focus on neighbourhood relations, daily life, and urban memory (Han, 2022) ; and urban geography examines the spatial dynamics of temporal rupture and landscape transformation (González Martínez, 2021b). As a result, the conservation dilemma of shikumen is

often fragmented into a set of local problems and rarely understood as a dynamic system sustained by historical form, property institutions, capital logic, cultural memory, and resident life together. The field has not yet developed an integrated framework that can explain why shikumen are simultaneously preserved and eroded, romanticized and commercialized, a site of and housing problem. This gap means that policy and practical interventions often yield locally specific improvements that fall short of systemic change, and highlights the need for a thematic review that connects the drivers, impacts, and possible ways out of shikumen heritage-regeneration lock-in into a coherent line of explanation.

This paper constructs such an integrated framework through a thematic review, tracing the drivers, urban impacts, and sustainable regeneration pathways of shikumen lock-in to provide a reference for the living protection, adaptive renewal, and multi-stakeholder governance of historic residential neighbourhoods in China. The study draws on the general theoretical framework of lock-in and path dependence and applies it to the context of urban architectural heritage rather than to its more commonly studied domains such as informal settlements, energy transitions, or regional industrial decline. Accordingly, this review does not focus on any single impact or determinant but seeks to develop a holistic understanding of the multiple factors that produce and sustain the shikumen conservation and renewal dilemma. It aims to answer the following research questions: What historical, institutional, market, cultural, and physical-spatial factors drive the formation of shikumen heritage-regeneration lock-in? What impacts has this lock-in produced on architectural authenticity, residential life, community networks, urban memory, and renewal governance? What pathways out of shikumen heritage-regeneration lock-in have existing studies proposed, and what are their conditions and limitations?

MATERIALS AND METHODS

2.1 Selection of Literature

This review is based on the analysis of 126 articles. The literature search was conducted in May 2026 across two databases, the Web of Science Core Collection and CNKI (China National Knowledge Infrastructure). The core aim of the search was to identify research on the formation mechanisms, urban impacts, and sustainable regeneration pathways of shikumen heritage-regeneration lock-in, providing the basis for the thematic analysis that follows.

Using two databases in parallel was a methodological choice driven by terminological heterogeneity and language bias. As a local housing type, shikumen appears in English literature mainly under keywords such as “shikumen,” “Lilong,” or “Shanghai vernacular housing.” English studies tend to focus on concession-era heritage, transnational capital, and critiques of gentrification (González Martínez, 2021a; Zhao, 2004). Chinese literature more often uses terms such as shikumen, Lilong, historic character area, and old-town renewal, and tends to focus on architectural form, conservation practice, and living conditions (Spatial study on the present state of Shanghai Lilong architecture from a heritage perspective; The concept and pathway of building a transmission mechanism for urban living heritage: Experience and challenges in Shanghai’s historic character protection). Relying only on English databases would systematically miss in-depth Chinese discussions of restoration techniques, property restructuring, and community renewal, and vice versa. The Web of Science Core Collection provides international and multidisciplinary coverage with stable citation data, while CNKI covers Chinese journals, conference papers, and theses, and can be used to map how Chinese scholarship discusses shikumen. Theses indexed in CNKI were used only as auxiliary materials for terminology recognition and background understanding in this study. They were not formally coded or cited. The Chinese sources formally included were limited to journal and conference papers, in order to maintain consistency with the inclusion criteria applied to the English literature.

Drawing on terminology common in both English and Chinese literature, we constructed Boolean search strings combining "shikumen," "Lilong," and their synonyms with conservation- and renewal-related terms in each database. Related housing types such as new-style Lilong were included at the search stage but coded separately.

The screening followed a five-step process, shown in Figure 1.

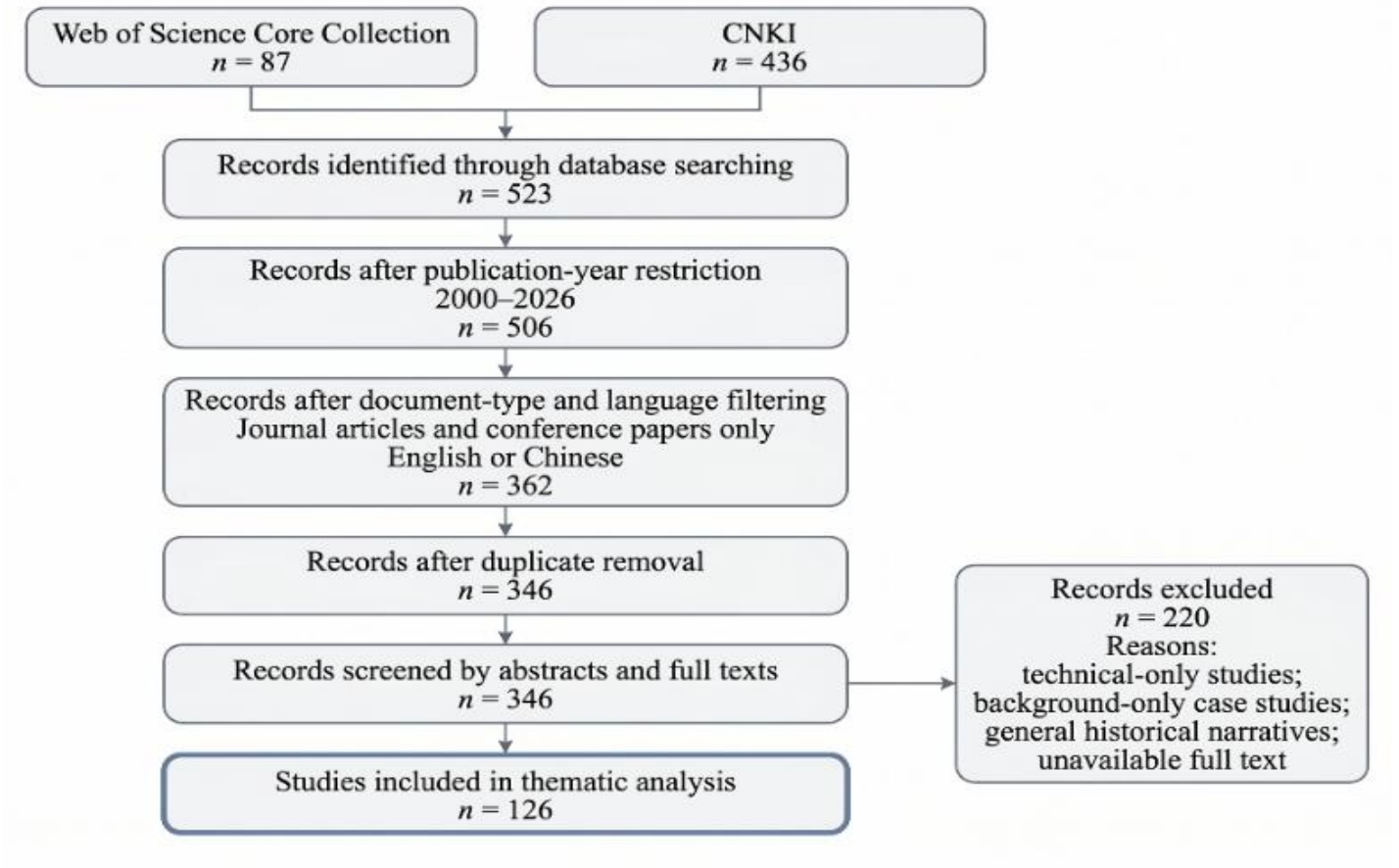


Figure 1: Literature selection workflow for the thematic review

Step 1: keyword search. Using the main and supplementary searches above, we ran the queries on the topic fields of both databases. Initial hits totaled 523, with 87 from the Web of Science Core Collection and 436 from CNKI.

Step 2: time range. The search window was set from 2000 to 2026. The year 2000 was chosen as the starting point to cover discussions around the opening of Shanghai Xintiandi in 2001, and to trace the continued development of research on shikumen protection, commercial reuse, old-town renewal, and community governance since then. This step reduced the literature to 506 articles.

Step 3: document type and language. Only journal articles and conference papers were kept, while theses, book reviews, news reports, and editorial commentaries were removed. The language was limited to English or Chinese, yielding 362 articles.

Step 4: deduplication. Because the search spanned two databases, some English journal articles, conference papers, or bilingual publications may have appeared in both the Web of Science Core Collection and CNKI. Deduplication was performed automatically in Zotero using DOIs as the primary identifier. For Chinese articles without DOIs, manual checks based on title, first author, year, and journal name were applied. After deduplication, 346 articles remained.

Step 5: abstract and full-text screening. Based on abstracts, keywords, and full-text reading, we removed the following categories: studies that addressed only technical building details without discussing conservation and renewal issues; studies that used shikumen only as a case backdrop while actually discussing other topics, for example studies using Xintiandi as a case to study consumption space or the night economy without engaging with the conservation and renewal of historic residential heritage; studies that offered only general historical narrative without touching on shikumen protection, renewal, reuse, residential evolution, or institutional change; and studies whose full text was not accessible. After abstract screening, relevance was verified through full-text reading, and 126 articles were finally included in the thematic analysis.

2.2 Process of Coding and Theme Assignment

This study uses a two-stage research design to systematically analyze, across the 126 articles, the drivers, impacts, and regeneration pathways of shikumen heritage-regeneration lock-in. The design includes a bibliometric stage and a thematic content analysis stage.

The first stage used VOSviewer 1.6.20 to perform a keyword co-occurrence analysis. The software is based on Visualization of Similarities (VOS) technology (Van Eck & Waltman, 2007). The aim of this step was to identify, through a co-occurrence network of article keywords, the most representative term clusters in shikumen research and how they relate to one another. This provided a data-driven starting point for later thematic coding. Since the study involves two databases, keyword sources differ across platforms. From the Web of Science Core Collection we extracted both author keywords and Keyword Plus, and from CNKI we extracted the author keyword field. The two sets were merged into a single keyword list and imported into VOSviewer. Preprocessing included unifying English plurals, hyphenation, and US/UK spelling differences, and manually merging Chinese and English synonyms, for example pairing “shikumen” with “石库门,” “Lilong” with “里弄,” “gentrification” with “绅士化,” and “adaptive reuse” with “适应性再利用.”

In the co-occurrence analysis, the minimum co-occurrence frequency was set to 2, the minimum cluster size to 10 keywords, and the normalization method to association strength. The keyword co-occurrence network and cluster structure produced in this step served as a starting point for the thematic analysis rather than a predetermined set of final themes.

Building on the keyword clusters from the first stage, the second stage applied the qualitative content analysis method of Boyatzis (Transforming qualitative information: Thematic analysis and code development) to carry out a thematic analysis. The aim of this stage was to read and code each article in turn, so as to address the limitations of bibliometric analysis in terms of content depth, and to identify the specific mechanisms and manifestations of shikumen heritage-regeneration lock-in. In ATLAS.ti 25, the 126 articles were coded at three levels. The first level was open coding, which extracted specific statements about drivers, impacts, and pathways from each article. The second level was cluster coding, which merged related statements into sub-themes. The third level was theme assignment, which grouped sub-themes under three main categories corresponding to the three research questions.

The thematic analysis took an inductive orientation, and the final themes were revised iteratively during coding. After initial coding, three sets of preliminary themes emerged. The first concerned the formation mechanisms of shikumen heritage-regeneration lock-in. The second concerned the impacts of this lock-in at the levels of buildings, residents, community, and city. The third concerned the policy and practice pathways for moving beyond this lock-in.

During coding and theme assignment, the study followed a triple analytical principle of content, context, and value orientation, and maintained the discursive position of each article. Whether a given issue appeared as a driver, an impact, or a pathway was not fixed in advance for any article but judged through cross-article comparison.

RESULTS

3.1 Background Information of Studies

The 126 articles finally included in the analysis show features in three dimensions, namely year of publication, geographic coverage, and disciplinary distribution. These features reflect the evolution of shikumen as a research object.

In terms of year of publication, shikumen-related research between 2000 and 2026 exhibits stepwise growth, as illustrated in Figure 2. Between 2000 and 2005, related research was relatively scattered, with fewer than three articles per year on average. Most studies provided early overviews of building typology, Lilong housing, and modern Shanghai residential space (Chen, 2001). Between 2006 and 2012, with the international spread of the

Xintiandi model and growing scholarly attention to the conservation of historic urban areas around the Beijing Olympics, research output increased noticeably. Gentrification, urban entrepreneurial governance, and the commercialization of historic neighbourhoods gradually became central topics (Arkaraprasertkul, 2009; Wai, 2006; Wang et al., 2006). Since 2013, with the policy shift toward urban regeneration in Shanghai, the strengthening of the historic character area conservation framework, and the renewal of the area around the site of the First National Congress of the Chinese Communist Party, themes such as heritage authenticity, original-resident resettlement, community participation, and living-space conservation have attracted increasing scholarly attention (Pan, 2015; E. H. Yung et al., 2014). Between 2023 and 2024, with the conservation-led reopening of Zhang Garden and the relocation of the Huayanli buildings entering public debate, research on shikumen conservation and regeneration grew further. The annual number of articles peaked in the sample period, and related practices continue to be examined in recent studies and reports (Wang & Xu, 2024; Xu & Zhang, 2023).

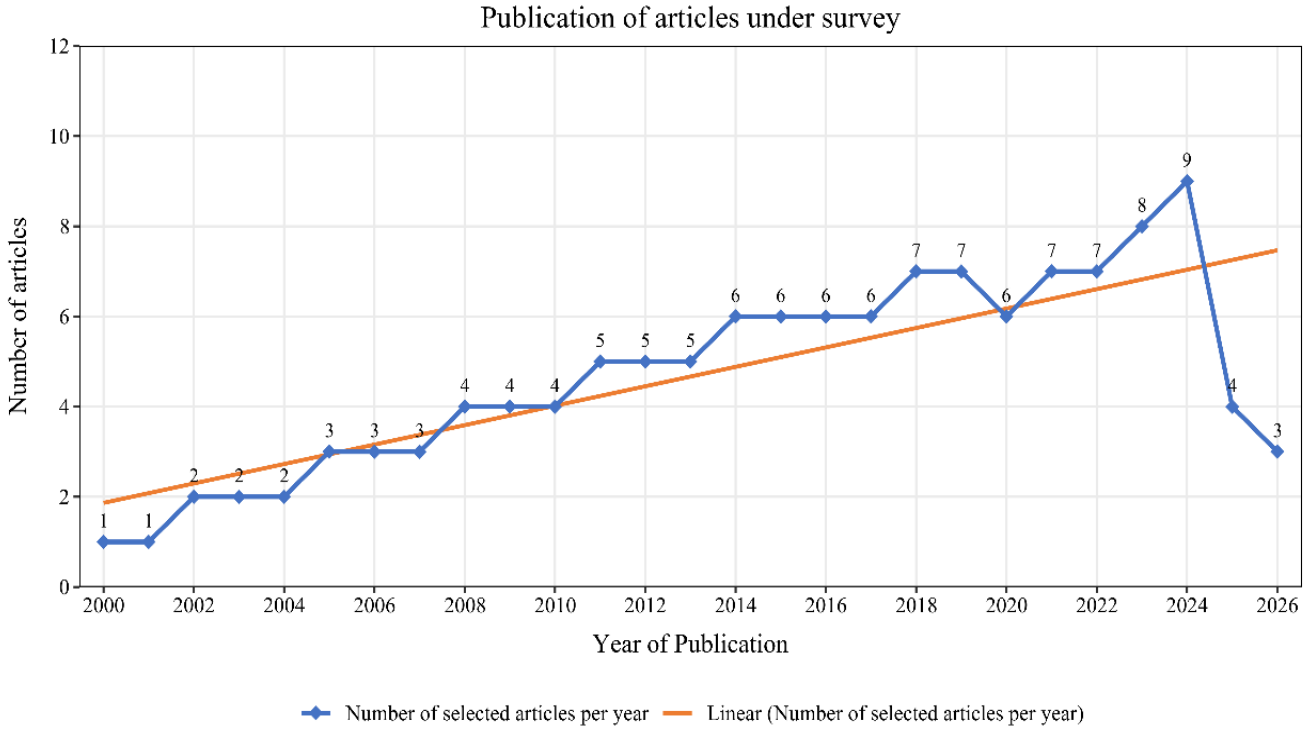


Figure 2: Annual distribution of shikumen-related research between 2000 and 2026

In terms of geographic coverage, most studies focus on central Shanghai. Huangpu, Jing'an, Xuhui, and the former Luwan district are the most discussed geographic units, as shown in Figure 3. Xintiandi, Tianzifang, Zhang Garden, Taipingqiao, Sinan Road, Jianyeli, the area around the site of the First National Congress of the Chinese Communist Party, and a number of old-style Lilong that still serve a residential function appear most often as cases in the sample (Zhu & Hein, 2018). A small number of comparative studies place shikumen within the wider spectrum of modern Chinese housing types, discussing it alongside the Beijing hutong, the Guangzhou Xiguan mansions, and the Lingnan qilou (Kim & Luchkova, 2018). Other studies draw cross-regional comparisons with modern Asian urban housing types such as Hong Kong's tong lau, Singapore's shophouses, and Taiwan's Dadaocheng (Knapp, 2000). The high geographic concentration reflects the strong regional character of shikumen as a Shanghai-specific housing type. It also suggests that cross-city and cross-regional comparisons remain a relatively underexplored dimension in the existing research.

In terms of disciplinary distribution, architecture, urban planning, heritage studies, sociology, urban geography, and public policy collectively constitute the field, with architecture and urban planning accounting for the largest share (Figure 3b). This distribution confirms the fragmented nature of research noted in the introduction.

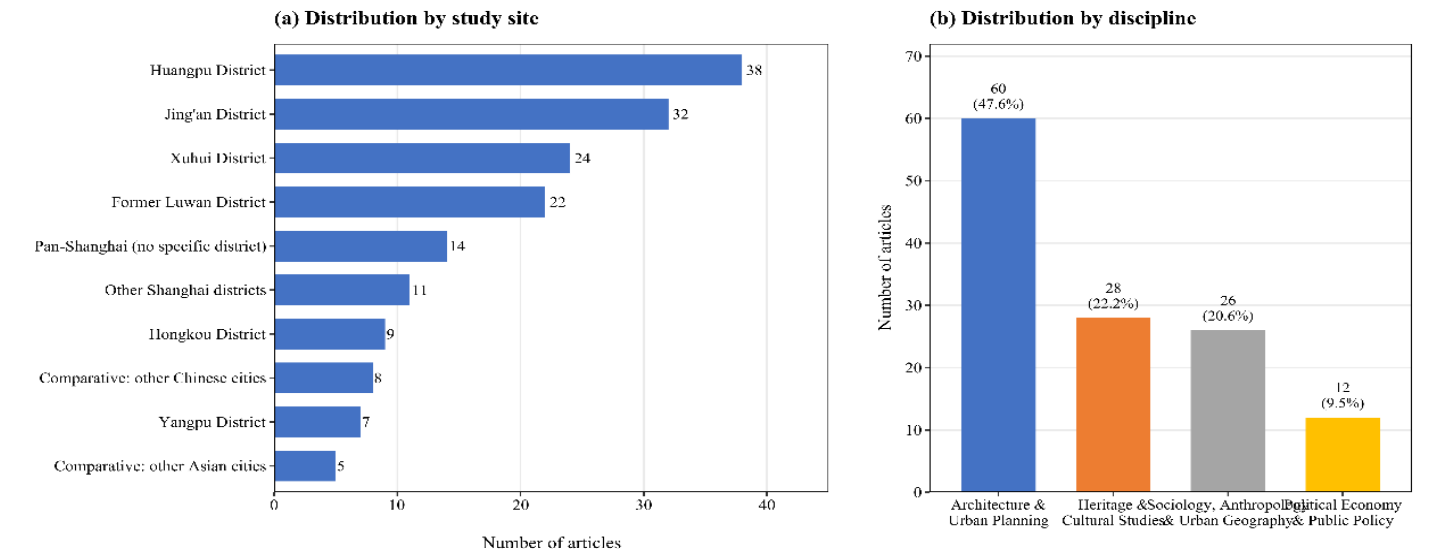


Figure 3: Distribution of the reviewed articles by study site and disciplinary affiliation

(a) Geographic distribution by Shanghai administrative district and comparative studies; (b) Distribution by disciplinary category

3.2 Bibliometric Analysis of Keyword Co-Occurrence

The keyword co-occurrence analysis of the 126 articles in VOSviewer produced a co-occurrence network made up of several keyword clusters. After keyword cleaning, synonym merging, and minimum co-occurrence filtering, about 118 keywords entered the network analysis. They formed 684 keyword links with a total link strength (TLS) of about 946, as shown in Figure 4. VOSviewer outputs the co-occurrence structure between keywords. The nine cluster names below are interpretive labels developed in this study based on node positions, keyword meanings, and reading of the underlying literature.

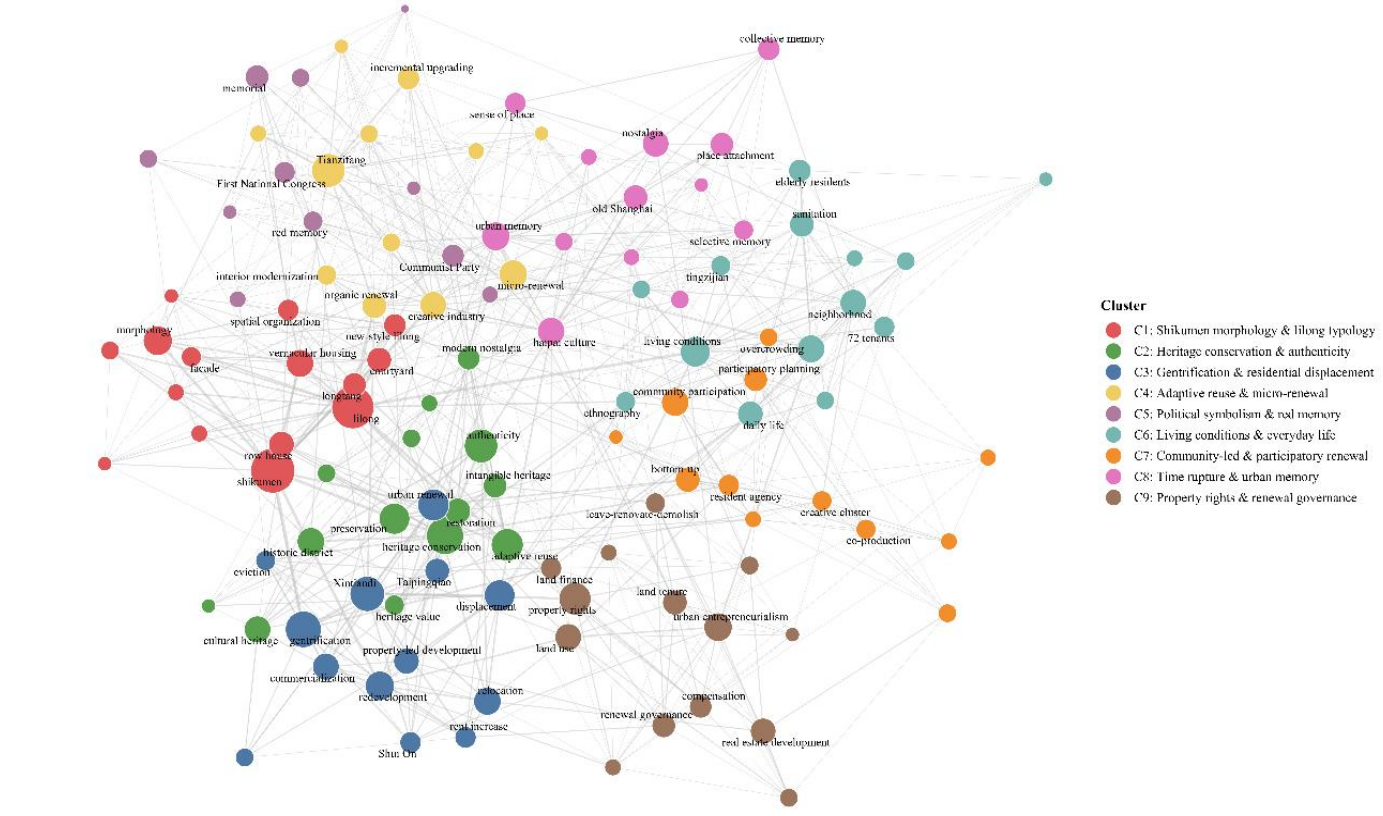


Figure 4: Map of authors' keyword network in shikumen heritage-regeneration research.

Cluster 1: shikumen form and Lilong typology. This cluster centers on the core nodes “shikumen” (about 42 occurrences, TLS about 198) and “Lilong” (about 38 occurrences, TLS about 176). Related high-frequency terms include “morphology,” “vernacular housing,” “row house,” and “courtyard.” The cluster mainly addres-

ses the formal evolution of shikumen as a modern Shanghai housing type, its spatial organization, its Chinese–Western hybrid features, and the morphological transitions between old-style Lilong, new-style Lilong, and related housing types (Arkaraprasertkul, 2009; Chow, 2014). This cluster provides the morphological basis for later discussions of lock-in around physical form and infrastructure.

Cluster 2: heritage conservation and authenticity debates. The core keywords of this cluster include “heritage conservation,” “authenticity,” “adaptive reuse,” and “修繕” (restoration). The cluster mainly addresses questions of authenticity, integrity, the scope of restoration, and the limits of reuse in shikumen conservation. Related studies often place the UNESCO Nara Document on Authenticity and the Recommendation on the Historic Urban Landscape into the Chinese urban renewal context, questioning whether practices such as facade retention combined with interior replacement, restoration to the original appearance, and “protection-oriented development” undermine the authenticity of shikumen as living heritage (González Martínez, 2019a; Zhu, 2024).

Cluster 3: gentrification and resident displacement. Centered on keywords such as “gentrification,” “displacement,” “relocation,” and “Xintiandi,” this cluster is one of the most extensively developed thematic groupings in the sample. Studies show that during shikumen renewal, original residents are often excluded from the gains, due to comprehensive relocation, rent increases, functional replacement, or commercial restructuring (Huang & Zuo, 2023). Xintiandi is frequently cited as a landmark case for discussing the complex relationship between Shanghai’s historic district conservation, urban entrepreneurialism, and gentrification (Ren, 2008; Wai, 2006).

Cluster 4: adaptive reuse and micro-renewal. The core keywords of this cluster include “adaptive reuse,” “micro-renewal,” “S.O.F.T.,” and organic renewal. Related research focuses on extending the service life of shikumen by optimizing interior space, adding infrastructure, introducing new functions, and making small-scale gradual changes, while preserving the external form and neighbourhood fabric as much as possible (Dong & Xiao, 2018). Tianzifang, with its gradual renewal jointly led by the street office, residents, artists, and small businesses, is one of the cases frequently discussed in this cluster (E. H. Yung et al., 2014).

Cluster 5 (political symbolism and red memory) centers on "memorial," "Communist Party," and "symbolic capital," examining shikumen as a vehicle for political memory and national narrative (Pan, 2012).

Cluster 6: living conditions and everyday life. The core keywords of this cluster include “living conditions,” “sanitation,” “overcrowding,” “tingzijian” (cabinet room), and “seventy-two households.” Related studies discuss the aging facilities, subdivided spaces, shared kitchens and toilets, multi-generational living, and high residential density of shikumen from the perspective of residents’ daily life (Liu & Iossifova, 2024). The pattern of multiple households per building, produced by property rights restructuring and housing allocation after 1949, constitutes a critical historical foundation for understanding the contemporary residential dilemma of shikumen (Arkaraprasertkul & Williams, 2015).

Cluster 7: community-led and participatory renewal. The core keywords of this cluster include “community participation,” “bottom-up,” “co-production,” and “creative industry.” Related studies explore the participatory renewal mechanisms that develop at the intersection of local government tolerance, market involvement, and resident self-adjustment (Li, 2011). The bottom-up renewal experience of Tianzifang is often contrasted with the top-down development model of Xintiandi as two different renewal pathways.

Cluster 8 (temporal rupture and urban memory) centers on "time rupture," "nostalgia," and "place attachment," discussing the cultural impact of shikumen disappearance, reconstruction, and display (Pawlik, 2025; Wang, 2023).

Cluster 9: property rights institutions and renewal governance. The core keywords of this cluster include “property rights,” “land use,” “urban entrepreneurialism,” and “retain, reform, and demolish.” Related studies

focus on the interaction between complex property rights structures, land development incentives, government-developer alliances, and resident negotiation in shikumen (Jiang et al., 2011; Zhu & Hein, 2018). Post-1949 institutions such as state-managed rental housing, the legacy of joint state-private operation, work-unit housing allocation, and the relocation policies from the 1990s onward are repeatedly discussed in this cluster as institutional roots of the shikumen dilemma.

3.3 Drivers of Shikumen Heritage-Regeneration Lock-in

The qualitative thematic analysis identified four sets of interrelated driving mechanisms that sustain shikumen heritage-regeneration lock-in. They concern property rights and conservation institutions, land value and commercial capital, cultural symbols and city branding, and physical form and infrastructure. A summary of representative studies for each type of driver is given in Table 1.

Property rights and conservation institutional lock-in is the primary structural root of the contemporary shikumen dilemma. After 1949, following the introduction of state-managed rental housing, joint state-private operation, and socialist housing allocation, shikumen homes originally owned by a single family were divided among multiple households for shared use or rental, often resulting in three to seven households per three-story building (Guo, 2011). The fragmentation of property rights means that any comprehensive renewal requires complex negotiation among multiple rights holders, readily descending into cycles of deadlock or forced demolition (Arkaraprasertkul, 2018). Compounding these property rights issues, Shanghai's conservation system relies on the categories of "outstanding historic building" and "historic character area," but many ordinary shikumen do not fit neatly within this rigid framework and fall into a gray zone where they are hard to redevelop wholesale and lack a clear path for upgrading (Zhu & Hein, 2020). Renewal policy direction also depends heavily on the negotiation structure among government, developers, and residents in specific projects, so that the boundaries among protection, renovation, and demolition are decided in practice by project conditions rather than by unified principles (Zhou, 2017). Property fragmentation thus not only raises renewal coordination costs but also strengthens the institutional inertia of project-based development and full relocation.

Land value and commercial capital lock-in manifests as the structural mismatch between inner-city land prices, residents' ability to pay, and the expectations of development capital. The potential commercial value of land on which central-city shikumen stand is far higher than residents' ability to pay, which placing heavy fiscal pressure on in-situ renewal schemes and gives local governments a key role in primary land development, resettlement compensation, and revenue distribution (Wang, 2011). The Xintiandi model, completed in 2001 and combining facade retention with interior replacement and high-end commercial reuse, has been widely discussed as a commercially sustainable conservation pathway, but at the same time it raises the bar for other low-return models and sets a paradigm that subsequent projects find difficult to depart from (Sun & Zhou, 2015). Similar dynamics are evident in Taipingqiao, where the redeveloped area has become a high-end residential and consumption space with sharply diminished prospects for original residents to return (Zhu & Goethert, 2010) , and in Tianzifang, which began as a bottom-up model but later faced rising rents, business turnover, and the gradual outflow of low-income residents (Wang & Zhou, 2022). Whether through comprehensive commercial development or gradual adaptive reuse, market capital can therefore intervene at different intensities and reconfigure the resident composition and spatial use, forming the economic lock-in of shikumen conservation and regeneration.

Cultural symbol and city brand lock-in stems from the multiple and sometimes conflicting meanings that shikumen carry at the same time. As material embodiments of Haipai culture, shikumen contribute to constructing the cultural identity of old Shanghai, so that their demolition is often read as a loss of urban memory but their retention raises the question of for whom they are retained and how they are used (Li & Yang, 2023). At the same time, parts of the shikumen fabric are imbued with strong political and memorial significance as spaces of Chinese Communist Party founding history, and are incorporated into urban narratives and national memory displays at key moments (Luo & Downey, 2025). Institutions such as the Wulixiang Museum convert shikumen daily life into a consumable experience of modern nostalgia and provide cultural legitimacy for commercial renewal (Ma, 2022). In addition, UNESCO's principles of authenticity and integrity continue to sit in methodological tension with Chinese concepts of restoring the old as the old and

reusing space for new functions (González Martínez, 2019b). The overlap of these multiple symbols makes it hard to treat shikumen as ordinary urban housing, and any conservation or renewal plan is inevitably drawn into debates over cultural identity, political memory, and city brand building.

Physical form and infrastructure lock-in is the most technical group of mechanisms within shikumen lock-in. The combination of mixed brick-and-timber construction, narrow lanes, compact courtyards, continuous gable walls, dense block fabric, and the lack of reserved space for modern municipal pipes makes later renovation highly complex (Zhong & Leung, 2019). After nearly a century of use, many shikumen exhibit structural deterioration, decayed timber components, and weak fire and seismic performance, and upgrading these systems without damaging the original form comes with high technical difficulty and high financial cost (Liu et al., 2024). The irreversibility of physical form has thus long kept shikumen renewal caught between high-cost micro-renewal and partial irreversible alteration.

Table 1: Drivers of shikumen heritage-regeneration lock-in and representative literature

Driver type	**Core sub-mechanisms**	**Key cases**	**Representative literature**
Property rights and conservation institutional lock-in	Property rights fragmentation; blind spots in the conservation system; project-based renewal decisions	Maijiali incident; relocation deadlocks; retain-reform-demolish cases	(Shao & Wang, 2016; Wan, 2014; Zhou & Cheng, 2019)
Land value and commercial capital lock-in	Mismatch between land price and residents' ability to pay; spread of the Xintiandi paradigm; later commercialization of Tianzifang	Xintiandi; Taipingqiao; later-stage Tianzifang	(Sun, 2007; E. H. K. Yung et al., 2014; Zhou et al., 2020)
Cultural symbol and city brand lock-in	Haipai narrative; red memory; modern nostalgia through museumification; methodological tension around authenticity	Area around the site of the First National Congress of the Communist Party of China; Wulixiang Museum; nostalgic landscape of Taipingqiao	(Gan-li, 2019)Tourism development of traditional urban houses: A case study of Shanghai shikumen; Diversity and inclusion: Exploring renewal approaches for Shanghai Lilong residential function
Physical form and infrastructure lock-in	Aging brick-and-timber structures; fire and seismic non-compliance; insufficient pipe burial depth; poor livability	Huayanli relocation project; underground space development of Zhang Garden	Resident satisfaction in conservation-oriented renewal of traditional Lilong: Chunyangli and Chengxingli pilots in Shanghai; 10.1080/15583058.2024.2408679

3.4 Impacts of Shikumen Heritage-Regeneration Lock-In

The four sets of driving mechanisms appear in the literature as four interrelated types of impacts working at the sociocultural, economic, residential, and heritage levels. A summary of representative studies is given in Table 2. Unlike a one-sided negative narrative, existing research shows a clear duality in the sociocultural and economic dimensions, where the same form of lock-in can produce destructive outcomes in some contexts and give rise to new social or economic forms in others.

Sociocultural impacts show clear duality. On one hand, wholesale relocation and facade-retention renewal break up the close neighbourhood ties built up in shikumen over long periods, dissolving mutual aid networks, shared memories, and the symbiotic block structure of shops in front and homes behind (Xu, 2020). After commercial uses are introduced, the everyday life of old Shanghai and neighbourhood relations may also be turned into nostalgic landscapes aimed at tourists (Lagerkvist, 2013). On the other hand, in neighbourhoods such as Tianzifang that have not been fully demolished, original residents, artists, and shop owners have over time developed a mixed-use social pattern of co-residence and coexistence, and the influx of creative industries has nurtured new forms of urban culture (Kong & Qian, 2011). This contrast shows that sociocultural vitality is preserved precisely where wholesale demolition has been avoided.

Economic impacts also have two sides. During the renewal process, original residents may lose the employment ecosystem built around local small businesses, repair shops, services, and informal labor, and after being moved to resettlement areas beyond the outer ring, elderly and low-income families face commuting difficulties and reduced economic opportunities (He & Wu, 2007). Several studies use Xintiandi and Taipingqiao to show that commercial-style conservation can raise land revenue while making it hard for original residents to share in the resulting value appreciation (Arkaraprasertkul, 2019). At the same time, Xintiandi, Tianzifang, and the reopened Zhang Garden are repeatedly cited as cases proving that historic buildings can generate substantial economic returns, with Tianzifang in particular forming a local ecosystem of small businesses, studios, and tourism consumption (Shan & Zhang, 2021). The key question is therefore not whether shikumen can generate economic value, but whether that value can be distributed equitably among original residents.

Residential impacts manifest as the systemic vulnerability of resident groups within shikumen that are still used for housing. Residents in such buildings are mostly local elderly people, low-income households, and migrant renters, who commonly face aging infrastructure, shared kitchens and toilets, and high fire risk (Zhong & Leung, 2019). They lack the capacity to fund comprehensive renovation themselves and live with persistent uncertainty about whether they will be included in the next renewal round, producing both housing anxiety and psychological strain. This residential dilemma cannot simply be solved through relocation, because original residents have a strong, hard-to-replace attachment to neighbourhood ties, networks of acquaintances, and local service systems (Liang, 2008). Residential impacts are therefore not only a question of material housing but also of everyday living space and social support.

Heritage impacts show up most clearly as authenticity debates and the loss of living substance experienced by shikumen during conservation. The facade-retention model represented by Xintiandi and Taipingqiao preserves external features at the material level but fundamentally changes interior spaces, functions, and residents, raising methodological debates about whether such restoration still counts as conservation (Ren, 2008). The Wulixiang Museum and similar institutions convert active residential culture into a consumable nostalgic landscape, shifting the heritage from a living scene into an object to be looked at. Through comprehensive restoration and underground development, Zhang Garden achieves a high standard of material conservation, but with the move-out of many residents the original everyday atmosphere has changed significantly (Y. Li et al., 2025).

Table 2: Impact dimensions of shikumen heritage-regeneration lock-in and representative literature

Impact dimension	**Main expressions**	**Key cases**	**Representative literature**
Sociocultural impacts	Breakdown of neighbourhood networks; dilution of Haipai culture; cultural revival in non-demolished neighbourhoods	Xintiandi replacement; cultural mix at Tianzifang	(Iossifova, 2015; Wu, 2016; Zhong, 2016)
Economic impacts	Collapse of resident-based employment ecosystem; concentration of commercial returns; local economy at Tianzifang	High-end consumption at Xintiandi; housing in Taipingqiao; shops at Tianzifang	(He, 2007, 2010; Liu, 2022)

Residential impacts	Aging facilities; shared kitchens and toilets; aging residents; relocation uncertainty	Existing residential Lilong	(Iossifova, 2009; Wang et al., 2024)
Heritage impacts	Authenticity debate; museumification; loss of living substance	Wulixiang Museum; nostalgic landscape of Taipingqiao; comprehensive conservation of Zhang Garden	(Li, 2019; Li & Chen, 2018)

3.5 Pathways Out of Shikumen Heritage-Regeneration Lock-In

In response to the four types of drivers and four types of impacts above, the literature proposes five interrelated possible pathways. They concern tiered holistic conservation, livability-focused renewal, controlled adaptive reuse, resident participation with community memory preservation, and multi-stakeholder governance. A summary of representative studies is given in Table 3. These pathways do not replace one another but support one another under different neighbourhood conditions, property structures, and governance capacities.

Tiered holistic conservation calls for a shift from point-based protection centered on individual outstanding historic buildings to area-based protection that covers historic character areas, neighbourhood fabric, and traditional building craft (Dai & Li, 2022). It also means applying differentiated interventions according to building value, structural safety, current use, and resident willingness, with strict protection for core historic blocks, greater allowances for interior renovation for ordinary Lilong, and reversible structural replacement for severely run-down buildings (CHANG, 2023). This tiered approach is meant to avoid one-size-fits-all protection or demolition.

Livability-focused renewal is the most direct pathway for addressing the shikumen housing dilemma. One systematic scheme is the S.O.F.T. framework, which modernizes interior space through functional supplementation, spatial optimization, functional integration, and technical adaptation, supported by tools such as private kitchen and toilet upgrades, modular equipment insertion, and energy efficiency improvements. Many studies stress that such renewal must start from residents' daily use and proceed through small-scale, reversible, and iterative design (Huang & Yao, 2023) , redefining modernization as gradual improvement within what original residents can afford rather than as a precondition of comprehensive replacement.

Controlled adaptive reuse argues that while allowing shikumen to accommodate new functions, institutional tools should be used to control the mix of businesses, in order to avoid the twin pitfalls of full commercialization and static museumification. Specific mechanisms mentioned in the literature include capping the share of commercial uses, setting tiered ceilings on rents, reserving a share for local small businesses, and using floor area ratios and business licensing to guide a mix of uses (Xing et al., 2025).

Resident participation and community memory preservation redefines shikumen conservation as a negotiation process centered on residents. Forms discussed in the literature include resident councils, participatory planning, co-design workshops, oral history projects, and the building of local archives (Pawlik, 2025). Such mechanisms help bring residents' housing preferences, property arrangements, and daily habits into design and construction, and offset the selective memory of museumification by making residents co-authors of the heritage narrative. The effectiveness of these mechanisms, however, depends heavily on the soundness of property arrangements and legal safeguards, and without institutional backing they tend to become symbolic (Xu & Lin, 2025).

Multi-stakeholder governance provides the integrative institutional support for the four pathways above. Proposals appearing repeatedly in the literature include setting up negotiation platforms among government, developers, residents, social organizations, and academic institutions (Wang et al., 2024) ; advancing local-level legislation on holistic conservation to reduce dependence on project-based decisions; and establishing cross-city exchange mechanisms with similar housing types such as the Beijing hutong, Hong Kong's tong lau, and Singapore's shophouses (Zhai & Tong, 2024). The core is to shift shikumen from project-by-project decision-making toward being maintained jointly by stable institutional frameworks and multiple actors.

Table 3: Possible pathways out of shikumen heritage-regeneration lock-in and representative literature

Pathway type	Core tools	Key cases and proposals	Representative literature
Tiered holistic conservation	Broader conservation coverage; conservation scale extended to neighbourhood fabric; living protection of building craft	Comprehensive protection of historic character areas; building craft as intangible heritage	(Wang et al., 2023; Zhao, 2004)
Livability-focused renewal	S.O.F.T. framework; private kitchen and toilet upgrades; reversible equipment insertion; gradual energy efficiency improvements	Interior renovation in existing residential Lilong	(Chen et al., 2022; Li & Lin, 2023)
Controlled adaptive reuse	Cap on business mix; tiered rent ceilings; preservation of basic neighbourhood functions	Lessons from Tianzifang; reflections on the Xintiandi model	(González Martínez, 2019; Jiang et al., 2025)
Resident participation and community memory preservation	Resident councils; participatory planning; oral history and community archives	Participatory experiments at Tianzifang; archive research at Zhang Garden	(Xu & Zhang, 2023; Zhai, 2025)
Multi-stakeholder governance	Multi-party negotiation platforms; holistic conservation legislation; cross-city learning	Governance structure of Zhang Garden in Jing'an District; cross-city comparative studies	(Chen & Qu, 2020)

DISCUSSION

4.1 Determinants of Shikumen Heritage-Regeneration Lock-In

Building on the thematic analysis above, the core theoretical contribution of this study is to show that shikumen heritage-regeneration lock-in is not only multidimensional. It also operates across multiple time scales. The layering of property rights fragmentation is a generational accumulation. The entrenchment of renewal paradigms operates on roughly a twenty-year cycle. The reproduction of cultural symbols is embedded in the implementation of specific projects. Physical aging unfolds slowly along the building life cycle. These lock-in mechanisms operating at different time scales interweave within the same historical period. Any intervention that operates on only one time scale will struggle to reach the sources of lock-in at other time scales.

The layering of property rights is the most decisive structural cause at the generational scale. The "property rights fragmentation" discussed in the literature is not a static feature. It is the cumulative result of repeated institutional changes after 1949, including socialist housing allocation, the reinstatement of state-managed rental housing in the 1980s, the marketization of housing in the 1990s, and the relocation compensation arrangements since 2000 (Shi et al., 2019). Each change failed to fully dismantle the property arrangements established by the previous stage. Instead, it superimposed the property rights claims of successive historical periods upon one another within the same building. This accumulated, unresolved historical legacy means that any renewal scheme must simultaneously contend with multiple property rights holders, several layers of policy expectations, and several generations of family relationships. The resulting coordination costs are far higher than those of urban renewal under single-owner conditions. This distinguishes shikumen heritage-regeneration lock-in from generic "old housing renewal" and precludes any simple equation with the urban regeneration challenges faced by cities in developed countries

The paradigm lock-in among renewal models works at the twenty-year scale. Xintiandi, completed in 2001, has been repeatedly invoked as the benchmark for successful conservation over the following two decades.

This is not because it excels in conservation terms, but because in public discourse it seemed to reconcile heritage imagery, financial feasibility, and place branding simultaneously, even though its social and residential consequences have always been controversial (Z. Li et al., 2025). Even though Tianzifang represents a gradual pathway based on existing housing and industry (Fang et al., 2021), its later commercial trend shows that a bottom-up model without institutional backing cannot automatically resist the penetration of capital logic (Yang & Liu, 2025). What distinguishes paradigm lock-in is that it operates at the cognitive level. The collective understanding of what counts as successful conservation has already been shaped by existing cases.

The political economy of cultural symbols is repeatedly reactivated at the project-cycle scale. Shikumen carry four mutually conflicting symbolic meanings at the same time: Haipai culture, concession-era heritage, Communist Party history, and modern nostalgia. This makes it difficult to handle them as an "ordinary housing type" (Luo & Downey, 2025). In addition, symbolic lock-in is not just an external pressure on conservation decisions. It is deeply embedded in development logic. The process by which the Wulixiang Museum turns old Shanghai life into a museum experience is itself a form of symbol production used by commercial development to gain cultural legitimacy (Martínez, 2017). Here, symbolic resources, cultural narratives, and capital accumulation are not external to one another. They are different sides of the same process.

The irreversibility of physical form unfolds slowly along the building life cycle. The aging of brick-and-timber structures, non-compliance with current codes, and insufficient pipe burial depth are the "technical aging" of a specific spatial form that took shape from the 1870s onward under the joint constraints of concession institutions, population scale, and construction technology. This deterioration cannot be removed by any law or policy. It can only be gradually eased through engineering. The Huayanli relocation project reflects the extreme logic of "using high technical cost to free up physical space" (He et al., 2025). Because of this physical lock-in, modernizing shikumen tends to involve a trade-off between high-cost micro-renewal and partial irreversible alteration.

Putting the four time scales together, the core feature of shikumen heritage-regeneration lock-in is not a set of isolated policy failures. It is the mutual nesting of multiple forms of lock-in operating on generational, twenty-year, project-cycle, and building life-cycle time scales. This observation echoes the cross-theme connections revealed by the keyword co-occurrence network. It suggests that the current shikumen debate is in fact a multi-layered network sustained by discourses at different time scales. It also provides a basis for the later discussion of the uneven distribution of impacts and the conditions for path coordination.

4.2 The Ramifications of Shikumen Heritage-Regeneration Lock-In

The thematic analysis above shows that the impacts on the sociocultural and economic dimensions both have a dual character. However, this duality is not a case of the same group facing both losses and gains. It is a systemic transfer of losses among different actors, which constitutes a structural feature of shikumen lock-in at the distributional level.

When this duality is situated within the context of multi-time-scale lock-in, it becomes clear that the positive consequences produced by different models in most cases do not compensate for the negative consequences in other dimensions. Although different studies give different estimates of the scale of displacement, the literature consistently discusses Xintiandi and Taipingqiao as typical cases of heritage-led commercial redevelopment accompanied by large-scale resident relocation (Ping, 2026). Tianzifang's success in the creative economy has been accompanied by the gradual exit of low-income residents (Wang & Zhou, 2022) , and Zhang Garden's strong performance in physical conservation has come at the cost of the relocation of about 1,200 households (Song et al., 2025). In each case, the positive outcomes are spatially, socially, and temporally separated from the original resident group, forming not a trade-off between cost and benefit but an asymmetric inter-group transfer.

To understand this uneven distribution more systematically, this study synthesizes the literature into a framework that maps the gains and losses of three groups of actors, as shown in Table 4.

Table 4: Distribution of gains and losses among different actors under shikumen heritage-regeneration lock-in

Actor type	Possible gains	Possible losses
Original residents	One-off relocation compensation; in some cases, material improvement in housing conditions	Moving out of the original neighbourhood; loss of local employment ecosystem; breakdown of mutual aid networks; rupture of social identity continuity
New users and consumers	High-quality commercial and residential space; Haipai imagery and nostalgic experience	Limited understanding of the real community history and the everyday life of original residents
Government and developers	Land revenue; urban cultural brand; long-term tax and commercial returns	Disputes over conservation legitimacy; pressure on social equity; questions about authenticity

The framework reveals that the gains and losses of the three groups occur on dimensions that cannot be compared with one another. The losses of original residents mostly happen at the level of everyday life and social networks, the gains of new users mostly at the level of consumption experience and symbolic meaning, and the gains and losses of government and developers at the level of public finances, brand image, and public legitimacy. There is no simple basis for comparing these three dimensions, and as a result, when renewal projects are evaluated using a single indicator such as economic output or building preservation rate, the costs borne by original residents are systematically underestimated. The positive evaluations of economic vitality, cultural revival, and urban memory in the literature largely reflect the experience of new users who move into the neighbourhood after renewal, not the experience of old users who remain or who have been moved out (Arkaraprasertkul, 2018). The impacts of shikumen lock-in have a dual character partly because the system physically retains the buildings while replacing the users, thus distributing positive consequences and negative consequences to different groups of people.

4.3 The Way Out of Shikumen Heritage-Regeneration Lock-In

The analysis above shows that the lock-in system, formed by overlapping time scales, makes it hard for any single pathway to generate enough force to reverse the trajectory. For this reason, the discussion does not simply enumerate the pathways themselves. It focuses on why path coordination is necessary and on what conditions support it.

Drawing on the literature, this study presents a path coordination matrix (Table 5). It makes clear what each pathway cannot achieve on its own for each type of lock-in, and under what path combinations each form of lock-in might be effectively loosened.

Table 5: Correspondence between the four types of lock-in and the required path coordination

Lock-in type	Limits of a single pathway	Required path coordination
Property rights and conservation institutional lock-in	Resident participation alone cannot change the ownership structure	Multi-stakeholder governance, legalized negotiation, and tiered holistic conservation
Land value and commercial capital lock-in	Adaptive reuse alone will be absorbed by market logic	Controlled adaptive reuse, long-term leasing and business mix mechanisms, and preservation of local businesses
Cultural symbol and city brand lock-in	Museumification alone shuts original residents out of the cultural narrative	Resident participation, community oral history, and a living-conservation orientation
Physical form and infrastructure lock-in	Rigid protection alone leads to buildings that can be kept but not lived in	Livability-focused renewal, technical adaptation, and tiered, differentiated intervention

The core message of the matrix is that breaking each form of lock-in depends on the coordinated action of at least two pathways. No single form of lock-in can be fundamentally loosened through one pathway alone. The

policy implication of this finding is not that more pathways are always better. It is that the choice of pathways must match the specific form of lock-in. Three sets of coordination relations deserve particular attention.

The first set involves the apparent tension between tiered conservation and livability-focused renewal. Tiered conservation starts from differentiation among objects of protection. Livability-focused renewal is grounded in residents' daily needs. The two appear to operate according to different priority frameworks, but their potential point of integration is that tiered conservation can create institutional space for livability-focused renewal, allowing ordinary Lilong greater latitude for interior renovation within the conservation framework. Livability-focused renewal provides practical tools for tiered conservation, so that Lilong included in the protection system do not fall into the state of "kept but not livable." What is needed for coordination is not a choice between pathways but a more refined institutional distinction between conservation and renewal.

The second set involves the institutional backing required for controlled adaptive reuse. The later commercialization of Tianzifang shows that a gradual model without long-term institutional commitment struggles to resist the capital logic set by paradigm lock-in (Xie & Tu, 2023). Relying solely on after-the-fact control of business mix and rent often cannot offset the attraction of the existing "success" imagination. Several design suggestions mentioned in the literature, such as reserving a certain share for local small businesses, providing legal space for basic public services, and setting tiered restrictions on the rental structure (Li & Zhu, 2014)), need to be embedded in long-term agreement systems. Institutional controllability must be raised from a project-level design option to a neighbourhood-level institutional commitment.

The third set involves the institutional link between resident participation and multi-stakeholder governance. The loss transfer noted earlier suggests that participation, if not embedded in property arrangements and compensation mechanisms, often becomes symbolic. This means that resident participation needs institutional support at two specific points. The first is before renewal begins. A resident representative mechanism that can constrain agreements between government and developers must be set up, so that original residents' housing preferences, property arrangements, and daily habits gain a legally meaningful negotiating position. The second is during and after renewal. A monitoring mechanism that involves social organizations, academic institutions, and residents must be established, so that the renewal process does not immediately enter a phase of commercial logic takeover once the project is completed.

Considered together, point toward a more fundamental shift beyond the tools themselves. It is an epistemological adjustment from treating shikumen as architectural specimens to treating them as living heritage. This shift directly answers the dilemma of "the building is kept, but the living culture is lost." Within this framework, the five pathways are not interchangeable options. They each respond to a different time scale of lock-in, and together they loosen the layered structure of lock-in as a whole.

CONCLUSIONS

The persistence of the shikumen conservation and regeneration dilemma does not come from the failure of any single policy. It is sustained jointly by four mutually reinforcing forms of lock-in: property rights and conservation institutions, land value and commercial capital, cultural symbols and city branding, and physical form and infrastructure. Based on a thematic review of 126 Chinese and English articles, the core theoretical contribution of this study is to show that shikumen heritage-regeneration lock-in is not only multidimensional but also multi-time-scale. It unfolds at the generational, twenty-year, project-cycle, and building life-cycle levels. The interlocking among these scales means that any intervention that operates on only one scale will struggle to shake the overall structure of lock-in. Within this framework, the four types of impacts on the sociocultural, economic, residential, and heritage levels are not a balance of gains and losses for the same group. They are a systemic transfer of losses among different actors.

In response to this lock-in system, the five pathways identified in the literature, namely tiered holistic conservation, liveability-focused renewal, controlled adaptive reuse, resident participation with community memory preservation, and multi-stakeholder governance, are not interchangeable options. Breaking each form of lock-in depends on the coordinated action of at least two pathways. The key to escaping lock-in lies in a more fundamental epistemological shift, namely a shift from viewing shikumen as architectural specimens to treating them as living heritage. When the agency of residents is placed at the canter of conservation and

regeneration, shikumen may move from being a steadily disappearing heritage burden toward becoming a model of inclusive, resilient, and culturally vibrant urban regeneration.

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