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Market-led densification of suburbia: Types of developers and their resource management for strategic decision making

Katharina Künzel

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Abstract
Suburban areas have significant potential for densification to address housing shortages, yet municipal planning departments often exhibit inertia in fully exploiting this potential. Consequently, private developers have increasingly driven suburban densification initiatives, becoming key actors. Despite their growing influence, the strategic behaviour of developers remains poorly understood. This study investigates the types of developers involved in suburban densification and their strategic decisions through a case study of Dortmund, Germany. Document analysis and semi-structured interviews reveal four key developer types: Entrepreneurial Builders, Land Developer-Investors, Property-Improvers and Owner-Occupier Developers. The different strategies of each developer type are dictated by the specific resource configuration, demonstrating a fundamental dichotomy: Entrepreneurial Builders and Land Developer-Investors depend heavily on market-dependent resources while in contrast, Property-Improvers and Owner-Occupier Developers leverage relationship-dependent resources like political networks. The findings indicate that developers' resource dependencies fundamentally dictate densification outcomes, concluding that development emerges as a market-driven process shaped by developers' strategic actions. This paper clarifies developer heterogeneity in suburban densification by empirically linking an established developer typology with specific resource management configurations.

Keywords: Densification ▪ developer ▪ infill development ▪ inner-urban development ▪ development process ▪ resource management ▪ Dortmund

Marktgesteuerte Nachverdichtung in Suburbia: Typen von Developer und ihr Ressourcenmanagement bei strategischen Entscheidungen

Zusammenfassung
Suburbane Gebiete verfügen über erhebliches Verdichtungspotenzial, um den Wohnungsmangel zu beheben. Kommunale Planungsbehörden zeigen sich jedoch oft zu träge bei der vollständigen Ausschöpfung dieses Potenzials. Infolgedessen treiben private Developer Verdichtungsinitiativen voran und demonstrieren ihre Rolle als wichtige Akteure der Stadtentwicklung. Trotz des wachsenden Einflusses ist das strategische Verhalten von Developern kaum untersucht. Dieser Beitrag analysiert Developer, die suburbane Nachverdichtung vorantreiben, und ihre strategischen Entscheidungen anhand einer Fallstudie in Dortmund. Qualitative Dokumentenanalyse und semistrukturierte Interviews identifizieren vier Kategorien: Entrepreneurial Builders, Land Developer-Investors, Property-Improvers und Owner-Occupier Developers. Die verschiedenen Strategien der einzelnen Entwickler werden durch die spezifische Ressourcenausstattung bestimmt, was eine grundlegende Dichotomie offenbart: Entrepreneurial Builders und Land Developer-Investors sind stark auf marktabhängige Ressourcen angewiesen während Property-Improvers und Owner-Occupier Developers vermehrt beziehungsabhängige Ressourcen wie politische Netzwerke nutzen. Die Ergebnisse zeigen,

✉ **Katharina Künzel**, Fakultät Raumplanung, Technische Universität Dortmund, August-Schmidt-Straße 10, 44227 Dortmund, Germany
katharina.kuenzel@tu-dortmund.de

dass die Ressourcenabhängigkeiten von Bauträgern die Ergebnisse der Verdichtung maßgeblich bestimmen. Daraus lässt sich schließen, dass die Entwicklung ein marktgetriebener Prozess ist, der durch die strategischen Handlungen der Entwickler geprägt wird. Der Beitrag zeigt die Heterogenität von Entwicklern bei der suburbanen Nachverdichtung, indem er eine etablierte Entwicklertypologie empirisch mit spezifischen Konfigurationen des Ressourcenmanagements verknüpft.

Schlüsselwörter: Nachverdichtung ▪ Developer ▪ Baulückenschließung ▪ Innenentwicklung ▪ Entwicklungsprozess ▪ Ressourcenmanagement ▪ Dortmund

1 Introduction

The global urban landscape is increasingly characterised by intensified development pressures and a shift towards market-led urban development in built-up areas (Heurkens/Hobma 2014; Li 2015). Densification, as a policy ideal, supports the vision of compact cities by reducing urban sprawl and fostering sustainable development (European Commission 2016), and is widely regarded as a means to provide more sustainable housing (Claassens/Koomen/Rouwendal 2020: 1; Hartmann/Dembski/Hengstermann et al. 2023: 465). While discussions often focus on inner-urban areas (Altrock 2022: 130), suburban areas hold substantial densification potential due to their low density and large portion of under- and unused land (Touati-Morel 2015: 604; Fassbender/Ludwig/Hild et al. 2022: 1). This potential is complicated by a tension between policy goals that promote compact, sustainable urban forms and prevailing market preferences in prosperous suburban neighbourhoods which continue to favour low-density housing (Couch/Karecha 2006: 360; Zakrzewski/Berndgen-Kaiser/Fox-Kämper et al. 2014). The conflict between policy goals and market preferences complicates the activation of densification potential to address housing shortages in suburban areas.

Mobilising land is also challenging for planning authorities, as it requires intervening in built-up areas with existing property rights (Hartmann/Needham 2016) and the interests of different actors (Gerber/Hengstermann/Viallon 2018: 17). Understanding the strategic decision making of the actors involved, such as private landowners or developers, and their land-related interests is therefore key (Bouwmeester/Gerber/Hartmann et al. 2023; Künzel/Korekt/Artmann et al. 2024). While municipal planning often sets the stage, private developers are frequently the primary drivers of densification (Filion/Leanage/Harun 2020: 314), acting as "central coordinators and catalysts" (Healey 1991: 224), who bridge the gap between users, investors and urban development (Henneberry/Rowley 2002: 99). Yet, their strategic decisions in densifying built-up areas remain poorly understood.

This study examines their decision making through the lens of resource management, defined here through Knoepfel/Larrue/Varone et al.'s (2007: 63) resource model, which understands resources as specific assets that developers utilise to execute projects. These resources include law, money, personnel, organisation, infrastructure, time, information, consensus, political support and force. This study understands resource management as the strategic configuration and deployment of specific assets, such as law, money and political support, which developers prioritise and leverage to navigate constraints and implement densification projects. Examining how developers manage these resources is essential because it directly reveals the strategic choices that distinguish different developer types and advances our understanding of suburban densification practices.

The core premise of this paper is that types of developers are distinguished by their different resource strategies and configurations. This means developer-typology and resource-model analysis are intrinsically linked. The paper identifies types of developers active in suburban densification, analysing their type-related characteristics and strategic decision making. Thus, the guiding research question is: How do developers strategically implement suburban densification? Two sub-questions are addressed: first, which types of developer are involved in suburban densification, and second, which factors influence their decisions, focusing on their resource management.

This paper investigates suburban densification in Dortmund through a single-case study. Dortmund serves as the unit of analysis due to the high level of developer-driven densification activity in the city's suburban areas (Ehrhardt/Sommer/Ndim et al. 2025: 292). Understanding strategic behaviour requires a qualitatively orientated research design. Document analysis and semi-structured interviews are used as the main methods to analyse developers' characteristics, strategies and decision making. The results highlight how developers' resource management influences development outcomes and offer empirical insights into mechanisms of suburban densification.

2 Current perspectives on the role of developers in densification

Densification, defined as a "net increase in housing units" (Broitman/Koomen 2015: 34) within a developed area, is a complex process shaped by the actors involved, spatial conditions and planning orientation. The diversity of densification strategies suggests that land policies must accommodate varying conflicts of interests to support effective implementation (Puustinen/Krigsholm/Falkenbach 2022: 1). Strategies range from government-led approaches to those which rely more heavily on private sector initiatives (Puustinen/Krigsholm/Falkenbach 2022: 6), identified as owner-driven high-density and incremental development (Puustinen/Krigsholm/Falkenbach 2022: 6). This highlights private-sector involvement in suburban densification where small developers and homeowners drive local development (Touati-Morel 2015: 606). Infill development, particularly on small vacant lots, is crucial for housing supply but often occurs without direct municipal oversight (Pinnegar/Randolph/Freestone 2015: 281; Ehrhardt/Behnisch/Jehling et al. 2023: 194). Suburban densification therefore centres on small-scale, infill development largely influenced by private market actors rather than public authorities pursuing comprehensive urban planning goals.

This gives developers a central role in the dynamics of suburban densification. Property markets are not impersonal economic arenas but highly organised, complex networks of interacting organisations (Healey 1991: 220). Institutional perspectives shed light on key players within the property market, focusing on their roles and interrelationships (Healey 1991: 219). Behavioural perspectives emphasise actors' power, informal routines and ideas rather than rigid rules (March/Olsen 2005; Barzelay/Gallego 2006; Bevir/Rhodes 2010). Behavioural perspectives are thus essential to analyse actors' roles and strategies in suburban densification. The role of real estate developers is critical for shaping urban spaces. They act as primary catalysts for local economic development and have significant influence (Meijer/Buitelaar 2023: 1). Municipalities see developers as partners delivering housing projects, facilitating urban growth and alleviating municipal financial burdens (Eichhorn/Ehrhardt/Münter et al. 2024: 6). Developers can therefore be understood as "proactive agents who make things happen" (Charney 2007: 1179). Yet, the functions developers fulfil in development are diverse, making it challenging to apply a single generalised description (Coiacetto 2001; Meijer/Buitelaar 2023: 2). The literature provides several ways to characterise different types of developers. Common approaches distinguish developers by market segment (Brown 2015), by firm size and geographic scope, or by their level of proactive or reactive engagement in development (Coiacetto 2001), separating "active developers" who proactively initiate projects from "passive developers" who await emerging opportunities (Meijer/Buitelaar 2023: 2). Other frameworks focus on characteristics like vertical integration strategies (Ballard/Butcher 2020: 271; Meijer/Buitelaar 2023: 2).

McNamara's (1983) behavioural typology of developers, based on their interest in developable land, adds depth to the understanding of development processes by integrating socio-political and social relations (Healey 1991: 228). It is constructed by examining the land-holding strategies of developers over time, linking a developer's time horizon before development (e.g., acquiring and land asset banking) with their strategic decisions after development (e.g., sell, lease or self-use). This results in nine distinct types of developers, spanning from Entrepreneurial Builders focused on short-term action to Owner-Occupier Developers focused on long-term action (see Figure 1).

In densification processes, different types of developers undertake different projects. For instance, some build units for immediate sale, reflecting the type of Entrepreneurial Builders; while others prioritise rental housing for stable long-term returns (Rérat/Söderström/Piguet 2010; Götze/

	AFTER DEVELOPMENT		
BEFORE DEVELOPMENT	SHORT-TERM	LONG-TERM (LEASING OUT)	LONG-TERM (OWNING & OCCUPYING)
SHORT-TERM	ENTREPRENEURIAL BUILDER	LAND DEVELOPER-INVESTOR	DEVELOPER-USER
LONG-TERM (LEASING OUT)	ASSET CLEARING PROBABLY INVESTMENT SWITCH	PROPERTY IMPROVER	EXPANDING DEVELOPER/USER
LONG-TERM (OWNING & OCCUPYING)	CAPITALIZING ASSETS	CHANGE IN RETURNS FROM PROPERTY	OWNER-OCCUPIER DEVELOPER

Figure 1 Nine types of developers according to their interests and holding strategies Source: McNamara (1983: 90)

Bouwmeester/Jehling 2024: 1276), representing long-term holding strategies. Each developer type therefore contributes uniquely to housing supply, driven by specific project goals and strategic decisions (Götze/Bouwmeester/Jehling 2024: 1276). The typology of McNamara (1983) illustrates how varied objectives, from immediate returns to long-term investments, shape different development strategies. The significance of this typology is that it provides a nuanced framework that directly links developers' actions to their underlying interests and holding strategies in land.

While the typology explains developers' interests and identifies players in the market, it does not fully capture the reasoning behind their strategic behaviour. Developers rely on a defined institutional framework or regime that sets the "rules of the game" (North 1990: 3). This institutional context, including market dynamics, property rights and legal regulations, mediates interests and creates opportunities (D'Arcy/Keogh 2002: 26). Crucially, these institutional rules directly determine access to, use of and modification to the resources that developers can deploy. Institutional context hence greatly influences the resources a developer can access, such as financial capital, political connections or market knowledge, which in turn guide decision making (Adams/Disberry/Hutchison et al. 2002: 139).

This paper's core theoretical argument is that while institutional context determines the available resources, the developer's type, as defined by their fundamental business model and strategic objectives (McNamara 1983), dictates which of these resources are critical. Therefore, the type of developer and their primary resource configuration are co-constitutive: the developer type precedes the strategic deployment of resources, as a developer's long-term identity and business model shape which resources they prioritise and cultivate. The resources are therefore best understood as the "hand of cards" held by the player, which are dealt by the institutional context. The specific hand a developer holds is largely determined by their developer type, and their strategic decisions are the "moves" they make with the cards they have been dealt.

To gain insights into the decision-making processes related to suburban densification, it is therefore useful to examine the resource management of developers. This is highly relevant for understanding developer behaviour because it allows us to move beyond static classifications to analyse developers' dynamic, context-specific decision-making processes (Guy 2002: 265). This makes their strategic operations visible by focusing on how they manage, utilise and exchange resources to achieve their objectives. The analysis of the resources available, and the extent to which the institutional context affects them, offers valuable insights into processes, outcomes and impacts (Knoepfel/Larrue/Varone et al. 2007: 64).

This paper adopts the framework of Knoepfel/Larrue/Varone et al. (2007), which identifies ten key resources. These resources are the practical means or instruments, the "hand of cards" that a developer uses to shape interactions and influence outcomes, and which decides their strategic moves. The framework identifies ten such resources: law, money, time, personnel, information, organisation, infrastructure, consensus, political support and force. For instance, the law can be used not only to comply with regulations but also to secure legal rights or challenge administrative decisions (Knoepfel/Larrue/Varone et al. 2007: 66). Consensus can be built to legitimise actions and foster support (Knoepfel/Larrue/Varone et al. 2007: 87). Likewise, information is leveraged to reduce uncertainty and identify strategic opportunities (Knoepfel/Larrue/Varone et al. 2007: 71), while time can be managed as a critical factor in negotiations or as a bargaining tool (Knoepfel/Larrue/Varone et al. 2007: 87). Crucially, in applying this framework to property development, the resource of infrastructure is interpreted as the tangible property or land itself, the foundational asset required for any development project. Gaining control of this central "card" is, therefore, the primary prerequisite for any development initiative.

This framework is a comprehensive tool for analysing strategic behaviour because it recognises that these resources are not equally distributed; the "hand of cards" depends on the developer type. A core premise of this paper is that different developer types are explicitly distinguished by their distinct resource strategies and configurations. This analytical approach establishes a clear causal link from the macro-level institutional context (the rules of the game) to the micro-level strategic actions of developers (the players' moves), demonstrating that a player's strategy is fundamentally determined by the unique resources (hand of cards) that their specific type allows them to hold (see Figure 2).

3 Methods

This paper employs a two-phase mixed-methods approach designed to systematically investigate developer types and their resource management strategies in suburban densification. Phase 1 identifies and categorises developers based on their fundamental business models. A document analysis is conducted to map out the developer markets in Dortmund. Developers active in suburban densification are assigned to different types of developers. To this end, the paper examines the strategic decisions of developers based on the resources "in their hand" through qualitative interviews and content analysis. This approach enables a comprehensive view of developer types and the relevant resources they

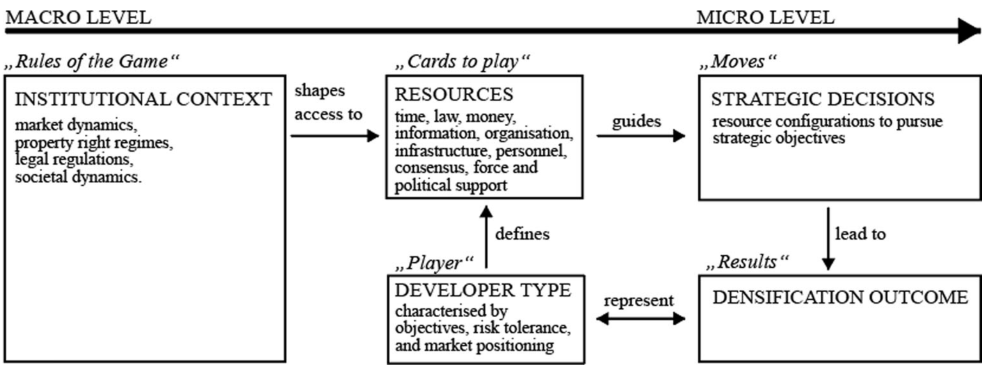

Figure 2 Theoretical argumentation linking institutional context with developer type's resource management and strategic decision making

employ, furthering understanding of how developers strategically implement suburban densification.

Identifying the distinctions among developers is essential for comprehending the different outcomes of suburban densification. Developers differ in their market focus and strategic orientation, influenced by the scale at which they operate. For this reason, an in-depth analysis of the developer market in Dortmund was undertaken to categorise developers relevant to suburban densification. A document analysis of various media sources and the online presence of the specific developers also allowed a descriptive characterisation of operational attributes and activities. Through a skimming process involving keyword search strings (Bowen 2009: 32) in search engines, developers engaged in densification projects were identified. The specific German search strings employed included: "Bauträger UND Dortmund", "Nachverdichtung UND Dortmund", "Projektentwicklung UND Dortmund". The inclusion criteria required developers to have at least one completed or ongoing suburban densification project within Dortmund's city limits in the last five years. Developers focused exclusively on non-residential or large-scale greenfield projects were excluded. A total of 26 developers were initially selected: this was reduced to 22 developers who operated specifically in suburban areas.

The qualitative document analysis was intended to offer insights into the different types of developers operating in Dortmund's residential property market who aimed to make use of densification potentials. To address the potential for self-promotional bias in online sources, the analysis focused on verifiable operational indicators rather than marketing claims. The semi-structured interviews in Phase 2 served as a key method for triangulating and validating these initial classifications. 83 documents formed the analysis sample from company websites and other accessible internet sources, offering valuable insights into developers' characteristics and supporting an understanding of their roles (Merriam/Tisdell 2016: 118).

To systematically distinguish between developer types, the content analysis operationalised McNamara's (1983) typology by creating a structured coding frame. This process involved examining the document sample for verifiable indicators corresponding to the typology's two core dimensions: (1) the time horizon of land holding before development, and (2) the strategic decision concerning the asset after development. For example, developers were coded as having a short-term holding strategy if the documents emphasised a quick project turnover and sale. Conversely, a long-term strategy was indicated by a focus on building a rental portfolio or developing for self-use. The post-development strategy was determined by analysing project portfolios to distinguish between build-to-sell (characteristic of Entrepreneurial Builders) and build-to-rent/hold models (characteristic of Property-Improvers or Owner-Occupiers). By systematically coding each developer against these operationalised criteria, it was possible to assign them to one of the identified types. This structured coding allowed a descriptive representation of the property market by identifying patterns, affiliations and common traits across developers. By extending the analysis of developers beyond consideration of their holding strategies in land (McNamara 1983), different types could be identified in the sample. The resulting characterisation for each type not only helped to describe relevant groups of developers thoroughly but also gave an insight into their preferred densification strategies and development scope.

To analyse the resource management of developers in suburban densification processes, it is essential to examine the development process, motivations and interests of the types identified in the first phase of the research. Qualitative semi-structured interviews are particularly useful for uncovering drivers behind strategic behaviour and revealing the enabling policy environment developers operate in, pro-

Table 1 Overview of interview partners and corresponding developer types

Interviewee Code	Developer Type
Developer 10	Entrepreneurial Builder
Developer 14	Land Developer-Investor
Developer 15	Property-Improver
Developer 16	Land Developer-Investor
Developer 19	Owner-Occupier Developer
Developer 20	Entrepreneurial Builder
Developer 21	Property-Improver
Developer 22	Entrepreneurial Builder

viding deeper insights into actors' motivations (Maryudi/Fisher 2020: 143). Such interviews allow exploration of the situational meanings, motives and everyday theories of developers that are hidden in their development choices. From the initial sample of 22 developers active in suburban densification, eight agreed to participate in the interviews. To clarify the representativeness of the interview sample, Table 1 provides an overview linking the anonymised interview partners to the developer types discussed in the results.

The interview guideline is based on the analytical framework of resource management (Knoepfel/Larrue/Varone et al. 2007) and addresses unique aspects of suburban densification. The objective was to identify which resources were most critical for each developer type, analyse their interrelation and explore how the developer types manage these resources. Following the interviews, a qualitative content analysis adapted to the framework of resource management was performed on the datasets to analyse resource management across developer types. The coding frame combined concept-driven categories and data-driven codes, allowing a comprehensive analysis of developers' resource management strategies. By focusing on a framework-oriented analysis, a detailed understanding of developers' motivations and strategies is achieved, along with insights into the critical resources they deploy. The determination of a resource as "critical" was not based on the mere frequency of its mention, but on its perceived impact on project outcomes and its strategic importance as articulated by the developers themselves. The analysis focused on identifying the resources that fundamentally enabled or constrained a developer's specific business model.

4 Results: Four types of developers densifying suburbia

Through document analysis, four of the nine theoretically derived types of developers were identified as relevant for densifying suburbia in Dortmund (see Figure 3). Each type displays distinct characteristics and behaviour. Their strategies move between incremental infill-development and larger brownfield or hinterland projects, with varying focuses on market segments, risk tolerance and interaction with regulatory frameworks. The findings demonstrate a clear dichotomy, which forms the central argument of this paper: short-term developer types strategically leverage market-dependent resources like money and time, while long-term types rely on relationship-dependent resources such as organisation and political support. This confirms the theoretical premise that a developer's type, defined by their core business strategy, dictates the specific "hand of cards" they must play. While all developers require access to most resources to some degree, the following sections highlight those that are uniquely configured or prioritised

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LONG-TERM (OWNING & OCCUPYING)	CAPITALIZING ASSETS	CHANGE IN RETURNS FROM PROPERTY	OWNER-OCCUPIER DEVELOPER

Figure 3 Four main types identified for densifying suburbia in Dortmund Source: author's figure related to McNamara (1983)

by each type, thereby defining their strategic approach to densification.

4.1 First type: Entrepreneurial Builders

The Entrepreneurial Builder focuses on short-term land holding. These small-scale developers, often from architecture or house-building sectors, operate locally. They retain properties briefly to maximise turnover rates and profits, prioritising short-term financial gains. Their projects, primarily high-end condominiums and single-family homes, cater to suburban homeownership demand, with one developer emphasising a shared "enthusiasm for home ownership" on his website (Developer 10). Entrepreneurial Builders pursue opportunistic incremental densification by conducting small-scale infill projects, typically involving up to five plots in well-established suburban neighbourhoods. By leveraging existing development rights and infrastructure, they efficiently introduce new housing with minimal disruption.

As a direct consequence of this short-term, opportunistic model, the resources of money, law, time and infrastructure are critical to the Entrepreneurial Builder's success (see Figure 4). As a short-term type, their strategy is fundamentally shaped by their reliance on market-dependent resources. Financially, they adapt their strategies to market conditions, prioritising high-profit returns in demand-driven markets while switching to public-subsidised housing in high-interest environments to sustain profitability and "to have, let's say, a business and not no business" (Developer 19). Legally, they prefer working within existing zoning regulations to avoid delays. Time is a key constraint, with developers under significant pressure to complete projects swiftly, often prioritising plots with existing development rights to minimise planning delays. One developer emphasised that they "don't have the time to wait for a development plan" (Developer 22). Additionally, these developers may pay higher prices for readily buildable plots to ensure a quick turnover or may sell sites rapidly if unanticipated obstacles arise. Another developer described this opportunistic behaviour: "if it doesn't work for them, then they move away from this ideal very quickly and negotiate the area through" (Developer 19). This resource-dependent, adaptable approach shows that entrepreneurial builders operate efficiently in a demand-driven market, pushing incremental infill in suburban densification.

4.2 Second type: Land-Development Investors

Land Developer-Investors are typically small, local firms with business or economic backgrounds. They pursue both long- and short-term landholding strategies, balancing asset growth with rapid project turnover. They focus on multi-family housing, high-end rentals and owner-occupied apartments targeting upper-middle-class buyers, orientated strongly to market demand, as one developer stated. "We prefer to look at what is marketable. In other words: What is available locally, what do local people like best?" (Developer 14). Their densification approach combines infill-development and the redevelopment of urban vacancies, as they "also buy existing buildings, redevelop them and add them to the portfolio" (Developer 16), primarily within legally compliant frameworks. This strategy enables them to provide high-demand housing options in very popular suburban neighbourhoods, blending mostly high-quality, owner-occupied, multi-family units into the suburban landscape while maximising return potential.

The hybrid strategy of Land Developer-Investors is built upon careful management of money, law, infrastructure, information and time (see Figure 4). Their focus on marketable locations and streamlined approvals underscores

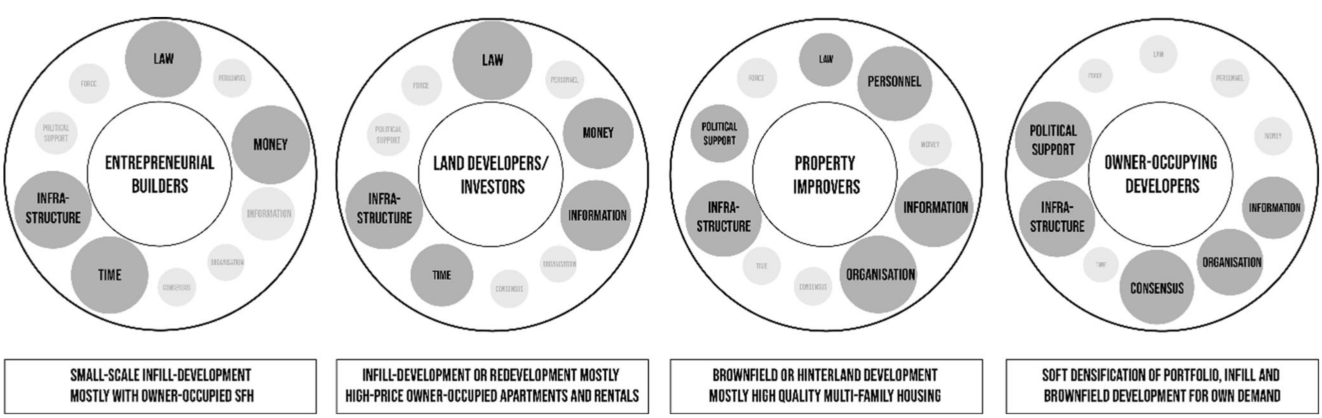

Figure 4 Resource management of four developer types densifying suburbia in Dortmund Source: author's figure related to Knoepfel/Larrue/Varone et al. (2007: 63).

their dependence on market-dependent resources that minimise risk and accelerate returns. Financially, they balance short-term gains with long-term asset growth, reducing risks and dependence on favourable market conditions. Legally, they focus on properties with established zoning plans to streamline approvals and mitigate development risks, "the planning horizon is otherwise too long" (Developer 16). They acquire properties pre-market through real estate networks, securing well-located lots to ensure marketability. "Data protection is a big issue. There is no register of owners in Germany. [...] That's why you have to work with estate agents" (Developer 16). The reason that they operate in suburban areas is primarily connected to the marketability of such locations: "and there are of course good locations [...] in suburban areas" (Developer 16). With longer holding periods and calculated quick turnovers, Land Developer-Investors build robust portfolios, diversify risks and improve project viability, positioning themselves as adaptable contributors providing high-value properties and redeveloping vacancies for Dortmund's suburban densification.

4.3 Third Type: Property-Improvers

Property-Improvers are mid-sized, well-established developers rooted in the construction industry, recognised for their commitment to long-term land holding. Their approach is characterised by property holding strategies especially after development, favouring gradual, sustainable growth; as one developer underlined, "you start in the red and then it grows into a fortune" (Developer 21). Operating on a regional scale with a focus on the local city, these developers engage in a broad range of projects, from infrastructure to housing, often in collaboration with the authorities in public-private partnerships. Their densification strategy is aimed at enhancing suburban neighbourhoods through high-quality, multi-family housing and publicly subsidised units for middle to lower-class residents. They specialise in brownfield and hinterland rather than infill development, aiming to increase density and enhance neighbourhood quality.

The long-term, collaborative strategy that defines the Property-Improver's densification strategy is shaped by their ability to cultivate personnel, organisation, information, infrastructure, law and political support as key resources (see Figure 4). As a long-term type, their success hinges on their ability to leverage relationship-dependent resources. They prioritise strategic land acquisitions, leveraging local networks to secure locations and minimise costs. Their personal network is important for land acquisition, as one developer emphasised: "We are very well networked in Dortmund. That is why many people get in touch when they have land to sell. And we often have the chance to get the property" (Developer 21). Their in-house expertise enables them to oversee all development phases, ensuring efficiency and quality. With a deep local knowledge base and extensive networks by "working a lot around the church" (Developer 21), they can identify viable projects swiftly. Their competencies in legal planning frameworks are key, as they navigate complex regulatory landscapes by collaborating "closely with the necessary authorities, drawing up development plans" (Developer 15), sometimes even "circumventing the law" (Developer 21). Political support is an important resource for Property-Improvers. They "know the politicians and then you know how to approach things" (Developer 21). Financially, they emphasise long-term stability by diversifying across market segments, ensuring resilience against short-term market shifts.

4.4 Fourth Type: Owner-Occupier Developers

Owner-Occupier Developers are typically medium to large, well-established housing associations or co-operatives focused on long-term land holding strategies. They hold properties for long periods, renting out to members of the co-operative and focusing on the sustained development of their own portfolio. "We do not have to sell. We build for our own portfolio, in our own time" (Developer 19). Targeting only their co-operative members, these developers operate with a local focus, investing primarily in well-known suburban and urban neighbourhoods. Their strategy centres on soft densification, achieved mainly through the modernisation of existing properties, such as adding storeys to buildings or converting unused attic space, rather than new infill projects. They also build extensive projects in cooperation with the local authority, often using municipal land reserves.

The strategy of Owner-Occupying Developers relies mostly on infrastructure, organisations, information and consensus (see Figure 4). Their long-term, community-focused model is enabled by relationship-dependent resources that insulate them from short-term market pressures. With no need for a rapid project turnover, they prioritise strategic land acquisitions near their established portfolio, optimising logistics and reducing costs. "In principle, [we] buy in areas that are close to our portfolio" (Developer 19). By managing most project phases in-house, Owner-Occupier Developers reduce their dependence on external contractors and increase control over development outcomes. They also leverage networks with authorities for early access to development opportunities on municipal land reserves. Recognising the importance of community alignment, they actively seek public consensus to ensure their projects align with long-term social value for their members. This is often manifested in project designs that may include communal green spaces or energy-efficient retrofitting; as one developer noted their goal is to "not just build, but to create a healthy living environment for our members for the next 50 years" (Developer 19). Property assets are held until optimal conditions arise to gain flexibility in case of market shifts. "The land is available in the portfolio. In other words, in times when it is difficult to realise new buildings economically, this is interesting against this background" (Developer 19). This highlights their role as community-focused, long-term developers for their own (member) purposes.

4.5 Four developer types between short-term gains and long-term strategies

The four developer types show distinct strategies that directly link back to the main argument of this study. Each developer type navigates to create a unique balance between short-term financial gains and long-term investment objectives, which in turn determines their approach to densification through a complex interplay of resources (see Figure 4).

This interplay reveals a clear division. On the one hand, developers with short-term holding strategies leverage market-dependent resources. Money, law and particularly time influence the behaviour of Entrepreneurial Developers and Land Developer-Investors. Both these developer types prioritise short-term financial gains and densify incrementally with infill development by leveraging existing regulations and available infrastructure to minimise risks. Both are mostly small to medium-sized enterprises acting in a local context. Entrepreneurial Builders engage in low-density infill development pursuing rapid project turnover and avoiding planning procedures. Land Developer-Investors combine short-term investments with long-term portfolio growth, strategically acquiring and redeveloping properties. Both types are crucial in their facilitating of suburban densification through market-dependent infill strategies that integrate new housing into well-established neighbourhoods.

On the other hand, Property-Improvers and Owner-Occupier Developers adopt long-term land-holding strategies that depend on relationship-dependent resources. Infrastructure, organisation, personnel, information and political support play crucial roles in these developers' strategic behaviour when implementing densification. Engaging closely with regulatory authorities and local communities, they densify in a sustainable manner with larger projects and soft redevelopment. Property-Improvers emphasise densification through larger-scale projects and brownfield redevelopment, capitalising on their extensive networks and organisational capacity to navigate complex regulatory landscapes. By collaborating closely with planning authorities and political actors, they secure strategic land positions and influence zoning adaptations to facilitate higher-density developments. Similarly, Owner-Occupier Developers demonstrate a commitment to long-term community values by integrating social and ecological considerations into their projects, incorporating densification within their established portfolios while maintaining long-term ownership.

The varying strategies of these four developer types illustrate the complexity of implementing effective suburban densification. While short-term developers accelerate incremental densification through infill projects driven by market-dependent resources, long-term developers enhance structural densification by shaping planning frameworks and fostering sustainable urban transitions through the cultivation of relationship-dependent resources. The differing approaches to resource management highlight the diverse strategies employed in densifying suburbia, shaped by the objectives, risk tolerance and market positioning of each developer type.

5 Discussion

The discussion systematically integrates the empirical findings with the theoretical framework to clarify the causal mechanisms driving market-led suburban densification. Developer strategies are not arbitrary but represent outcomes of specific resource configurations within a given institutional setting. This study uses McNamara's (1983) framework to identify four types of developers relevant for suburban densification in Dortmund: Entrepreneurial Builders, Land Developer-Investors, Property-Improvers and Owner-Occupier Developers. The key contribution of this paper lies in empirically linking developer types to distinct resource management configurations. This reveals a fundamental dichotomy between short-term types who leverage market-dependent resources (e.g., money and time), and long-term types who rely on relationship-dependent resources (e.g., organisational and political support).

These findings challenge generalised views of developer behaviour by demonstrating that strategic choice is fundamentally shaped by a type-specific resource configuration, moving beyond a planning-led view to identify private actors as the central catalysts of urban development. Suburban densification is predominantly driven by small and medium-sized enterprise developers. Unlike international investors who typically favour large-scale urban projects, these local and regional small and medium-sized enterprise developers dominate suburban markets (Eichhorn/Ehrhardt/Münter et al. 2024: 3). This localised approach highlights the developers' proactive engagement, which often occurs outside direct municipal control, reinforcing their importance in shaping suburban development, particularly given the passivity of German land policies (Ehrhardt/Behnisch/Jehling et al. 2023: 206). These dynamics illustrate that suburban densification is not primarily guided by public planning objectives but emerges as a market-driven process in which the strategic behaviour of developers plays a decisive role.

This study's framework explains how macro-level institutional conditions translate into micro-level development practices. The institutional context defines the overarching "rules of the game" (North 1990: 3) determining which resources are accessible and valuable. In suburban development, these institutional "rules" are conditioned by financialisation, legal frameworks and land accessibility.

Financialisation, characterised by the dominance of financial actors in urban development (D'Arcy/Keogh 2002: 27), has reshaped residential densification into a property-led investment strategy. This creates pressure for rapid returns and risk-averse behaviour, which most strongly affects Entrepreneurial Builders and Land Developer-Investors, whose defining feature is a reliance on money and time as critical resources. In demand-driven markets, where single-family homes remain a safe investment (Eichhorn/Ehrhardt/Münter et al. 2024: 7), empirical evidence highlights that Entrepreneurial Developers favour these developments as they align with lower risk thresholds and offer stability in uncertain markets. Their dependence on these market-sensitive resources causes them to adopt conservative, opportunistic strategies: they prioritise projects within existing regulations to avoid costly delays. Consequently, this risk aversion limits innovation in densification, leading to strategic conservatism. Here, the rules of the game, set by financial pressures, determine that the "cards" of money and time are most valuable, leading these players to make moves focused on immediate returns and risk mitigation.

Legal regulations and bureaucratic processes shape developers' strategies. The German legal framework and the passivity of municipalities create an environment where private developers often dictate the pace of development. Highly regulated planning frameworks often delay or complicate suburban densification efforts. These bureaucratic and lengthy planning processes cause developers to focus on areas with existing development plans, which provide more predictable outcomes and shorter timelines (Eichhorn/Ehrhardt/Münter et al. 2024: 5). Outdated development plans and lengthy bureaucratic processes remain significant hurdles, reducing the efficiency of resource allocation and implementation for more housing (Hartmann/Dembski/Hengstermann et al. 2023: 469). Developer types navigate this context differently based on their resource sets, or "hands of cards". Short-term types (Entrepreneurial Builders and Land Developer-Investors) treat the law as a fixed constraint. To protect the time resource, they strategically select sites with existing zoning rights, avoiding the planning process itself. In contrast, long-term types (Property-Improvers and Owner-Occupier Developers) treat the law as malleable. They leverage political support and organisation, using strong local networks to proactively negotiate regulatory adjustments and even draw up new development plans. This difference in resource configuration causes two distinct "moves" for engaging with municipal power: one of compliance and one of negotiation.

Access to land represents a critical challenge, with fragmented property rights and owner inertia presenting significant barriers (Reiß-Schmidt 2018: 998; Brenner/Haas/Krüger et al. 2024: 10; Künzel/Korekt/Artmann et al. 2024). Infilling of small, undeveloped plots has proven to be a viable solution (Ehrhardt/Behnisch/Jehling et al. 2023: 194). This institutional context of fragmented landownership and data opacity favours local small and medium-sized enterprises. They respond to this using real estate agents or a strong local network to gain access to land. Local small and medium-sized enterprises possess strong local networks, which function as a critical organisation resource. Property-Improvers, for example, rely on personal networks to be contacted directly by landowners. Land Developer-Investors, often lacking these deep local ties, rely on intermediaries like estate agents, making the information resource critical for them. The importance of these resources explains the observed dominance of small and medium-sized enterprises in this market, as their specific resource endowment gives them a competitive advantage in securing land, leading to a strategy of localised, incremental densification.

In summary, the institutional context, such as market pressures, legal regulations and planning culture, determines which resources are available and valuable, setting the "rules of the game" (North 1990: 3). The developer type is defined by the specific "hand of cards" they hold; that is, their unique and stable configuration of these resources, and their dependency upon them. Therefore, strategic behaviour is not an independent choice but is fundamentally dependent on the resources available to a specific type. A strategy is the "move a player makes" with the cards they have been dealt. This explains why resource management is type specific and how such configurations shape and constrain strategic options.

While developers strategically play the hand they are dealt, it is ultimately the municipality and the legislator who hold the power to change the "rules of the game" itself. As the creators of the institutional context, they define the rules of law and endowment of resources like money and legal authority. By altering this context, planners and policymakers can influence which "cards" hold the most value, thereby reshaping how the game is played and encouraging development towards more desirable outcomes. However, the interplay between municipalities and developers in suburban densification reveals significant power asymmetries that currently favour developers. Developers capitalise on these disparities to select the most profitable projects (Eichhorn/Ehrhardt/Münter et al. 2024: 6), which implies that there is a risk that housing demand may not be met and that insufficient building may occur (Erlwein/Meister/Wamsler et al. 2023: 8).

Developers are not cheating the system but are just playing their cards wisely to win the game. Municipalities and legislators are often unwilling or unable to change the "rules of the game". They frequently lack the political will or necessary legal framework to adapt to market dynamics, placing them in a reactive rather than proactive role. Developers, meanwhile, not only react to rules, they can reshape rule interpretation through practice, lobbying and incremental precedent-setting (Buitelaar/Lebbing/Pelzer et al. 2024). Therefore, although authorities possess the formal authority to rewrite the rules, their current inability or reluctance to deploy their power effectively allows the institutional context to continue to favour developers' strategic operations, making it the primary force shaping suburban densification.

6 Conclusion

The paper shows that developer types differ in their resource-management configurations and resulting strategies. In Dortmund, four developer types were empirically identified: Entrepreneurial Builders, Land Developer-Investors, Property-Improvers and Owner-Occupier Developers. Distinct resource priorities explain why different types pursue different densification strategies. The key contribution is empirical: the paper links a behavioural typology (McNamara 1983) to a resource-management lens (Knoepfel/Larrue/Varone et al. 2007) to explain why particular types act as they do under local institutional settings. By conceptualising the institutional context as the "rules of the game" and resources as the "hand of cards", the study demonstrates how a developer's type is defined by their unique resource configuration, which in turn dictates their strategic behaviour.

Addressing the study's sub-questions, four key developer types were identified in Dortmund: Entrepreneurial Builders, Land Developer-Investors, Property-Improvers and Owner-Occupier Developers. The first two focus on low-density, small-scale infill development, primarily single-family homes, while the latter two engage in larger revitalisation and multi-family projects for both ownership and rental markets. Their approaches are shaped by resource management, particularly financial conditions, regulatory frameworks and land availability. Developers with short-term perspectives (Entrepreneurial Builders and Land Developer-Investors) are highly market dependent, prioritising quick returns and playing the "game" with a focus on speed and efficiency. Those with longer-term strategies (Property-Improvers and Owner-Occupier Developers) mitigate financial risks over time and leverage political networks to navigate regulatory barriers, demonstrating a willingness to engage in more complex "moves" to achieve their goals.

In answering the main research question "How do developers strategically implement densification?" this paper finds that developers act within institutional frameworks that significantly shape their strategic implementation of densification. Entrepreneurial Builders and Land Developer-Investors dominate the suburban densification landscape by focusing on lower-risk infill developments. These types treat the legal framework as a fixed set of "rules" and will only make "moves" – that is, pursue projects – where densification is already permitted. Their strategies reveal a power imbalance, as their focus on opportunistic, legally compliant projects means that densification often occurs without strategic public guidance. Property-Improvers and Owner-Occupier Developers, in contrast, leverage their relationship-dependent "cards" (like political support and organisation) to negotiate with municipalities and actively change the "rules" for specific projects, enabling denser and more sustainable outcomes. These different strategic "moves", one based on compliance, the other on negotiation, underline the need for municipalities to better understand market dynamics to align suburban densification with strategic urban planning goals.

The qualitative case study approach, focusing on Dortmund, provides valuable insights but also presents limitations. The localised nature of the study means that findings may not fully translate to markets with a higher demand for housing or more internationalised developers. Furthermore, transparency issues in landownership structures limit visibility of market concentrations. A broader comparative study across different cities or national contexts with varying institutional frameworks would deepen understanding of suburban densification dynamics. While the small sample size of interviews offers limited insights, the applied framework effectively captures the heterogeneity of developer strategies, illustrating their dependence on regulatory conditions and available resources.

This paper contributes to the academic discourse by expanding the discussion on suburban densification beyond planning instruments and citizen perspectives. While previous research into developers active in densification has focused on negotiating practices (Bouwmeester/Hartmann/Ay et al. 2024) or power imbalances (Gerber/

Debrunner 2022), this paper advances the discourse on the micro-foundations of developer strategies. By empirically linking developer types to distinct resource configurations, this investigation reveals how strategic choice is a direct consequence of the "hand of cards" a developer holds within a given institutional context. Suburban areas require greater attention in academic debate, and this paper addresses this gap, linking it to developer strategies. Future research should further explore how municipalities and market actors can structure their relationships to support sustainable development.

The findings offer critical, type-related policy implications. For short-term types (Entrepreneurial Builders and Land Developer-Investors), who will only pursue densification where it is already permitted, planners cannot rely on negotiation. To encourage this incremental, market-led infill, municipalities must proactively change the "rules of the game" by creating as-of-right development potential through simplified approval processes, or pre-approved densification typologies. These developers will simply not "play" in areas without such clear rules. Conversely, for long-term types (Property-Improvers and Owner-Occupier Developers), a different policy approach is required. These developers hold the "cards", (e.g., political support and organisation) needed for complex, negotiated projects. Planners should engage these actors as strategic partners for larger-scale densification that requires bespoke planning solutions, like new development plans. A possible policy approach here could involve the creation of flexible, collaborative planning frameworks that allow for negotiation and co-production. Ultimately, recognising that different developer types are playing different "games" is crucial for effective policy. By understanding which "cards" each type holds and what "moves" they are willing to make, planners can use their own power more strategically to change the rules and guide market-led densification towards more sustainable and publicly beneficial outcomes.

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