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## Pushing Boundaries: Integrating Real Estate Studies Into Planning Scholarship

Edited by Sara Özoğul

Sara Özoğul, Tunbosun Oyedokun, Yinnon Geva, Mariam Hussain, Monica Lopez Franco, Federico Camerin, Martyna Joanna Surma, Kaio Nogueira, Tuna Taşan-Kok & Mike Raco

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INTERFACE



## Pushing Boundaries: Integrating Real Estate Studies Into Planning Scholarship

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## Pushing Boundaries: An Introduction to Integrating Real Estate Studies Into Planning Scholarship

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Real estate market dynamics are increasingly taking the center stage of planning scholarship. This shift is driven, among other factors, by unprecedented and global-scale investments in built environments (Robinson et al., 2020), the influence of financial means and actors on urban governance (Aalbers, 2020), and a strong focus on housing crises in academic and policy imaginations (Brill & Raco, 2021). Despite this newfound attention, planning scholarship often does not fully integrate insights from disciplines like real estate studies and as such has faced criticism, such as a limited empirical foundation in understanding real estate processes (Crosby & Henneberry, 2016), a lack of differentiation between various types of developers (Ballard & Butcher, 2019) and investors (Özoğul & Taşan-Kok, 2020), and an oversimplified perspective on investment decisions made by private sector actors (Raco et al., 2019).

This *Interface* aims to shed light on the challenges of integrating insights from real estate studies into planning scholarship, to dispute the prevalent black-and-white perspective regarding private sector engagement in urban development (Campbell et al., 2013). There is growing acknowledgement that market-oriented planning in many contexts demands a deeper understanding of real estate instruments and logics (Ferm & Raco, 2020), and that market dependency challenges the future of the planning profession (Wargent & Taşan-Kok, 2020). In this *Interface*, we argue that a more profound understanding of the interrelationships between planning and real estate dynamics necessitates challenging and dismantling disciplinary boundaries in the established literature. By doing so, deeper knowledge can be achieved, leading to more insightful conclusions and constructive policy recommendations.

A distinguishing aspect of this *Interface* is that the individual contributors are early career researchers. This group of scholars is identified as grappling with the challenge of “trying to step into the shoes of established planners while also finding exciting new ideas to help spatial planning evolve” (Haselsberger, 2017, p. 317). Challenges of interdisciplinary planning and real

estate research span from allegations of being uncritical and pro-market to more technical hurdles involving the integration of various epistemological principles and methodologies. However, it is our firm belief that much of the pioneering work and boundary-pushing in this field is accomplished by early career researchers, driven by their pursuit of fresh insights and novel solutions with an open-minded and experimental approach.

There is certainly a body of foundational and pioneering planning scholarship upon which many researchers continue to construct their work. For instance, Healey and Barrett (1990) championed the inclusion of real estate literature to understand better the behavior and strategies of actors in property development processes, while Adams and Tiesdell (2010) argued for a symbiotic rather than a dichotomous relationship between planners and the property industry. These perspectives are more important than ever amid shifting circumstances and power dynamics due to the neoliberalization and financialization of urban development. Neoliberal planning agendas are omnipresent and on the minds of many early career planning researchers, but instead of becoming disillusioned, contributors in this *Interface* aim to address them head-on by creating insightful perspectives that can bring about meaningful change.

The authors of the pieces which make up this *Interface* all have a PhD or postdoctoral research project in the field of planning studies and integrating real estate studies into their work. These contributions are bookended by reflections from more established scholars. There is just one exception with Tunbosun Oyedokun, who is embedded in real estate and shares his personal experience of integrating planning insights into real estate studies instead of the other way around. His fascinating account of the methodological issues of integrating qualitative insights from urban planning into real estate scholarship kicks off the discussion. It shows that many of the challenges are not planning-specific, but that improved integration through truly interdisciplinary research has the potential to benefit both planning and real estate studies.

This is followed by reflections on the different 'worlds,' normative realms, and bodies of knowledge inherent in planning and real estate studies. Yinnon Geva elucidates the challenges associated with questions and dilemmas arising from his work on the property industry – a realm seemingly conflicting with engaged scholarship aimed at dismantling neoliberal planning practices – and outlines how he resolved this conflict. Following this, Mariam Hussain delves deeper into the challenge of combining planning and real estate studies when examining mixed-use urban development, recounting her personal journey from planning education to real estate practice and ultimately interdisciplinary planning and real estate research. She emphasizes the significance of integrating market and economic analysis in planning studies to gain a more comprehensive understanding of the involved actors in the neoliberalized real estate development landscape.

Next, Monica Lopez Franco reflects on her experience accessing both real estate literature and data to comprehend intricate planning processes and their outcomes in the field of urban conservation in Mexico. She asserts that the complexity of urban processes cannot be grasped without understanding the interplay between urban planning and real estate forces. Federico Camerin picks up this issue by presenting a case for the relevance of real estate literature and direct engagement with real estate actors to dissect complex redevelopment processes of abandoned public-owned land in Italy through public-private partnerships. Martyna Joanna Surma continues the discussion by recalling her journey of realizing the need for primary data for her research on post-Covid workplaces in the UK, and the importance of investigating real estate industry metrics in a planning context. A key message emphasized in these contributions is that a complete understanding of planning and related cases is not possible without taking into account real estate market dynamics. The final early career contribution by Kaio Nogueira

skillfully advocates for a hybrid quantitative-qualitative methodological strategy while reflecting on the epistemological principles underpinning both disciplines and the related preferences of academic journals in terms of publications in both fields.

The *Interface* ends with a conclusion and reflection written by Prof. Tuna Taşan-Kok and Prof. Mike Raco, two leading scholars in planning and urban governance studies who specialize in scrutinizing the roles of real estate actors, property market dynamics and investment flows in the context of governance arrangements, public policy and planning instruments. They highlight the main findings from the contributions of early career researchers in this collection and stress the importance of developing new approaches and methodologies with a critical mindset.

Collectively, this *Interface* communicates optimism, even though it underscores the challenges inherent in interdisciplinary planning and real estate research. The contributors' journeys inspire while hopefully encouraging researchers who face similar challenges. Simultaneously, they demonstrate a broad spectrum of planning-related themes that can benefit from dismantling disciplinary boundaries, ranging from green buildings and housing, to transport, mixed-use development, conservation, public-private partnerships, and workplace planning and design. Additionally, I hope established scholars, reviewers, and journal editors in both disciplines find these stories of experimentation, persistence, and creativity helpful in fostering acceptance of those pushing disciplinary boundaries. If there is one takeaway from the *Interface* contributions, it is that the status quo is not immobilizing. Quite the opposite, all contributors invest time and effort in advancing our understanding of the interplay between planning and real estate dynamics, encapsulating the idea that, as stated by Campbell et al. (2013), planning can 'do better.'

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On behalf of all authors, I would like to express our sincere gratitude to Katie McClymont for her invaluable support and meticulous editing, which have been instrumental in shaping the quality and clarity of our work.

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## Integrating Qualitative Insights From Urban Planning Into Real Estate Scholarship: A Critical Reflection on Methodological Issues

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Urban planning and real estate are two interconnected fields, but research that cuts across these disciplines faces the methodological challenges associated with other interdisciplinary studies. Drawing from my experience investigating the impact of sustainability on the UK’s commercial real estate market, this piece critically examines the integration of qualitative insights from urban planning into real estate research.

Real estate is multidisciplinary. While it was once perceived as a subfield within economics or finance (Harrison & Manning, 2008), it now encompasses a wide range of topics and theories from planning, marketing, engineering, environmental science, architecture, geography, management, law, sociology, and psychology (Black et al., 2003; Diaz, 1993). But regardless of how the discipline is defined or construed, real estate principally focuses on the analysis, investment,

development, operation and management of real properties. It applies relevant theories to understand the decision-making processes of key stakeholders and the market outcomes of these decisions as reflected in variables such as rents, prices, construction, absorption and yields. Physical real estate can be rental or owner-occupied, residential or commercial, but whatever the use class and tenure, the aim of real estate discipline is to evaluate market outcomes of decisions taken by investors, developers and occupiers. However, while both qualitative and quantitative techniques are applicable in real estate research, the latter is predominantly employed (Adams & Tiesdell, 2010; Black, et al. 2003).

Quantitative methods are extensively used in real estate for several functions such as valuation and investment performance analysis (Harrison & Manning, 2008). Financial calculations are often employed using both cross-sectional for single-point evaluation and time-series data analysis when the focus is on evaluating historical trends. In addition, real estate analysis might require the application of regression-based models, for instance, to estimate the value of a property based on its observable characteristics (Dunse & Jones, 1998). Property investors are generally more inclined to assess market outcomes through numerical data and figures, rather than relying on textual information (Raco et al., 2019). As a result, real estate education typically prioritizes quantitative methods, leading to a culture where qualitative research is often considered a secondary approach (Diaz, 1993). The preference for a quantitative research approach is also evident in the methods employed in journal articles within the field (Crosby & Henneberry, 2016).

However, it is crucial to acknowledge that planning and urban policies also influence the property sector in diverse ways, and many of the resulting impacts are not easily captured or evaluated using quantitative models. These policies are used to regulate land use, development, and infrastructure in urban areas, and they can influence property values, investment opportunities, and overall market outcomes. Conservation policies, for instance, are intended to protect and enhance the value of older properties in historic districts. However, such policies have also faced criticism for potentially hindering investments in renovations and refurbishments needed to improve energy efficiency and increase the supply of green buildings (Godwin, 2011). On the other hand, mandatory energy performance and green certifications can boost the supply of green buildings, even when the margin of financial viability is minimal (Choi, 2010). Qualitative insights from planning are, therefore, crucial and opportunities to incorporate them into real estate research should be explored. I elaborate on this by reflecting on my experience researching the impact of sustainability in the real estate sector.

One of the major challenges I encountered during my doctoral research was the lack of prior experience and knowledge of qualitative research methods. I soon realized the importance of these skills in understanding the complex landscape of decision-making processes relating to carbon emissions, climate change, sustainability agenda and the role of real estate assets. I was interested in how sustainability was influencing the decisions of key market actors and whether these are reflected in how commercial offices are developed, valued, or leased. I initially set out to apply a quantitative research design that would allow me to evaluate 'green premium' – the additional rent or price that a building commands for being eco-certified. However, it became evident that I also needed qualitative data to understand the processes that led to the emergence of this financial benefit and the underlying drivers.

Before this time, I had limited training in the application of qualitative research methods and had not applied any of them despite having published a few journal articles. While I had proposed to use the hedonic pricing model, there were issues with this method. For instance, the



technique was incapable of capturing the emergence process and growth drivers of the green office sector. I realized that there were crucial factors influencing the commercial office sector that could not be adequately measured using the hedonic pricing model alone. In fact, with time, it became important for me to understand how the value of green offices is defined by other actors apart from developers and investors. Financial gain is usually the target of these stakeholders, but the social value of real estate assets also matters in the context of sustainability. Real estate assets can have a significant social impact by creating economic opportunities, supporting city branding, preserving cultural heritage, enhancing health and well-being and promoting accessibility and inclusivity. While these aspects often take precedence in policy and planning interventions, they remain very challenging to assess using quantitative methods.

The limitations of my preferred method meant that I needed to think of an alternative approach. Eventually, I adopted a mixed-use approach that included interviews with relevant stakeholders, as well as documentary analysis of development planning strategies related to green offices. The qualitative strand of my research enabled me to understand the rationale for the decisions of key actors and the role of government policies in the whole process. Why were developers creating eco-labelled buildings? Do investors and corporate occupiers prefer these buildings and if yes, why? Why are local councils demanding new developments and major retrofits to meet certain green standards? How are conservation policies conflicting with the retrofit agenda? All of these were pertinent questions which I could not answer solely through quantitative methods.

In line with the education received, most real estate researchers often gravitate towards quantitative research methodologies (Levy, 2006). However, qualitative research approaches can also provide valuable insights into the complexities of real estate markets, human behavior, and social dynamics. Thus, a more comprehensive approach that incorporates both quantitative and qualitative methods presents a significant opportunity to reach more informed conclusions (Black, et al. 2003). The realization of this potential has contributed to the increased adoption of qualitative research methods in the field. However, there still exists a clear gap in training and application.

To mitigate the methodological challenges in my research, I had to enrol on qualitative research modules. Although these modules were beneficial, I believe they could have been more appropriately integrated into my earlier higher education. Real estate faculties should enhance their approach to teaching research methods by encouraging students to explore the application of qualitative methods in research projects. This is particularly relevant for inquiries that intersect with planning or other social science subjects, where quantitative techniques may not be the most suitable means to address certain research questions. Research students engaged in cross-disciplinary topics should be supervised by teams consisting of academics proficient in both quantitative and qualitative methods. This arrangement is beneficial for incorporating diverse perspectives and expertise, thereby facilitating valuable feedback and quality supervision.

Methodological challenges associated with research at the intersection of real estate and planning can be overcome through the right education, integration of methodologies, and cross-disciplinary data analysis. Through collaboration between planning and real estate experts, potential methodological hurdles can be identified, and strategies can be developed to address them. It might be helpful for research teams to establish common frameworks to facilitate the integration and application of suitable statistical and qualitative methods capable of handling diverse data types. Research grant and journal reviewers should be open to well-designed qualitative studies, ensuring that rejection decisions are free from bias related to methodology. I was



able to publish an article based on the qualitative data from my research. However, I also recall that one of the reviewers expressed concern about the sampling process when indeed their feedback was inconsistent with the established sampling procedures for qualitative research.

The attempt here is not to suggest that a qualitative method must be applied in all real estate research. That is not realistic, and several topics will continue to be suitably addressed through quantitative techniques. Nevertheless, real estate researchers can also achieve the same level of rigor and impact by using qualitative methods or mixing both research approaches.

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## Which Side Are You On? The Challenge of Developer-Focused Engaged Scholarship

Yinnon Geva 

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Most planning scholarship is built on the explicit goal of contributing to the practice it studies. Many scholars have engaged directly with planning practice (and the people it affects) with the aim of intervening in policies and processes to achieve more equitable outcomes. This includes providing expert opinions in newspaper op-eds and legal amicus briefs; teaching applied and project-based courses and supporting disenfranchised communities through advocacy and activism (Siemiatycki, 2012). Importantly, scholars have leveraged their relative independence as academics to speak truth to power and address injustices in the practice, whether by working “from within” the planning administration, or by challenging it “from below” (Forester, 1988). That engaged scholarship still perseveres, and even attracts new scholars despite “count[ing] for little in the metrics that are used by university administrators” (Siemiatycki, 2012, p. 151), is a testament to the fundamental role of civic engagement in planning studies as a discipline (Campbell, 2012; Raynor, 2019). In this intervention I suggest several avenues for engaged scholarship of the development industry, based on my personal experience studying developers while also working alongside developers, planners, and communities in professional planning settings.

Like many others, I was initially drawn to planning studies’ transformative potential and opportunities for engagement, and continue to consider practical impact when choosing research topics. My graduate research started from a study of housing redevelopment’s social impacts, in direct relation to my professional work with community practitioners and the communities they represent. As the Master’s thesis evolved into a Ph.D. project, I realized that studying community aspects of a market-based redevelopment policy requires a better understanding of the development industry, to which the state delegated considerable community-facing roles (Geva & Rosen, 2018). The burgeoning subfield of planning studies that examines the development industry proved useful for understanding how market actors navigate various policy settings, and sometimes align with agendas beyond profit. Contributions in this field have helped identify new roles and capacities in city-building (Henneberry & Parris, 2013; Özoğul & Taşan-Kok, 2020; Payne, 2013), understand why certain market-based policies fail where others succeed (Adams et al., 2012; Brill, 2018), and elucidate the role of agency in local financialization processes (Hyde, 2018; Mosselson, 2017; Robin & Brill, 2018).

Yet my focus in research on urban development, and particularly on the development industry, presents several challenges for engaged scholarship. Planning research has long examined how public-sector and community actors navigate the growing entanglement of state and market, but traditionally, its “emphasis is still on putting policy rather than markets in the driving seat of urban development” (Ball, 1998, p. 1502). In contrast, the study of developers examines the relationship between policy and profit from the profit-seeking end, albeit while aiming to harness findings toward equitable agendas. An even sharper contrast exists with the tradition of *activist* scholarship (Siemiatycki, 2012) that works to dismantle neoliberal planning practices. Having been professionally raised on calls to resist planning’s complicity in “the maintenance of land use regimes in the name of property markets and profit, rather than people and public

goods” (Porter et al., 2013, p. 531), I face a constant dilemma: How can I center social equity in my work if it gives voice to those who profit from unequal development? And what would then be my place among engaged scholar peers? As Pete Seger defiantly asked, which side am I on?

In applying a (critically) engaged lens to my scholarship, I draw on Enora Robin and Michele Acuto’s (2023) review of urban scholars’ growing involvement in global hegemonic institutions such as the Intergovernmental Panel on Climate Change. Urban scholarship, they argue, is gradually being transformed, both by growing institutional pressures to produce applied research outputs and by a scholar’s search for meaningful impact in multi-sectoral decision-making settings. The result has been an often messy and contested repositioning of urban academic praxis “towards more explicit partnership-driven approaches, moving beyond scholarship as (solely) a mode of critique” (Robin & Acuto, 2023, p. 438). Can this shift occur in the research of urban development, itself a contested space with values and interests that vastly diverge from those of critical scholarship? I suggest three potential avenues for engagement in this vein.

The first avenue is through professional development for practitioners. Public planners are increasingly inclined to incorporate market thinking (Raco et al., 2019), but the effectiveness of this approach, for example in negotiating developer obligations, has been uneven (Biggar, 2021). In our role as expert advisors, engaged scholars can shed light on industry agendas, jargon, *modi operandi*, and importantly, on the varied ways in which developers address (and accept) policy and planning requirements. Traditional engagement routes such as professional publication and consulting can improve planners’ capacity to promote key agendas, including value capture and energy transition. One example comes from researching how developers negotiate housing redevelopment deals with homeowners (Geva & Rosen, 2018). In my consultancy roles, I built on these findings to highlight practices that increase homeowner control over redevelopment processes and worked with resident groups and municipal practitioners to favor these approaches and adopt them as recommended practice in official guidelines.

A second and related contribution comes from writing case studies of developer-planning interactions for a general readership, for example, chronicling fruitful inter-sectoral collaborations, local changes to industry standards, and successful policy tools. Notable academic planning publications already employ a case study research form and are readily available for dissemination. It is worth noting that urban scholarship has been deeply critical of best-practice urbanism’s role in neoliberal policy spaces (Peck et al., 2013). Packaging cases (e.g., model cities or policies) for easy consumption and circulation in global policy circles reinforces a notion of easy fixes and often normalizes processes that may have been contested in reality (Moore, 2013). For me, the recent downfall of Artscape, a Toronto-based non-profit dedicated to developing affordable art spaces, served as a cautionary example. In recent years, Artscape was hailed (by others, and itself) as a successful model of securing social purpose real estate through partnerships with developers, informing in part my own research on multi-sector real estate partnerships (Geva & Siemiatycki, 2024). Last August, however, the non-profit defaulted on a loan taken to pay for a landmark project and entered receivership, effectively losing control of multiple assets. These events accentuated the need to carefully sift useful takeaways from so-called ‘best-practice’ study cases.

The third avenue for engagement moves from the role of the “scholar as public planner” (Siemiatycki, 2012) into more applied, community-based involvement. With the growing prevalence of real estate in policy and society, an increasingly diverse set of community-based and non-profit stakeholders use development to achieve their goals (Geva & Siemiatycki, 2024). As professionals with no economic stake in development, engaged scholars are uniquely positioned

to support community-based and social purpose real estate initiatives. The University of Toronto's Infrastructure Institute, for example, is pursuing this goal by providing non-profits with training, technical support (e.g., in design or financial viability planning), and, perhaps most importantly, through building platforms that allow access to the inherently opaque and network-based industry. While such involvement is not an alternative to public investment in community infrastructure, it is very much needed in places where such investment has been systematically decimated.

The growing body of knowledge on private development would likely have multiple other applications for engaged scholarship. Such efforts will require ongoing self-reflection from any scholar as they make the case for their research in a discipline that has systematically documented developers' role in urban injustices. Engaging with the urban development practice means working within the grey areas of policy and practice, an inherently riskier choice than studying urban processes from afar. Early career researchers face an additional challenge as they must also justify such engagements within the quantitative impact parameters of neoliberal academic institutions (Zoll et al., 2023). Yet paraphrasing Campbell's (2012) call for action, engaged scholarship *matters* insofar as it is applied to the real challenges faced by planners that are working in an increasingly real-estate driven environment.

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## Dynamics of Mixed-Use Development: A Case for Integrating Real Estate Knowledge in Planning Studies

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The interdisciplinary and evolving nature of planning studies is difficult to compress into a few short years, graduate school, and even doctoral research. Throughout my planning education, particularly in terms of preparation for interacting with systems and institutions that governed our cities, my academic foundation in planning studies was heavily shaped by a reliance on state procedures and instruments, with private market actors and organizations placed as a backdrop. Once I entered the workforce, through initial involvement in a mixed-use project involving co-locating a residential high-rise with a regional shopping center, I quickly learned of

the dynamic and changing nature of roles in real estate development. Drawn to the complexity of private market and public sector planner negotiations in these projects, I began a PhD in investigating the systems and processes behind generating mixed-use.

In this first year as a research practitioner, I encountered a resounding gap between planning and real estate studies, observing that planning does not consistently confront and fully handle market forces. Evidence of this gap in the physical built environment can be found through mixed-use development, a long favorite of planning studies and Jane Jacobs' urbanism (1961) that envisages medium-density walkable neighborhoods, lined with green spaces and public street frontage. Real estate studies seemingly values these same attributes in property development. As I entered professional practice, my perspective was that planning was a regulatory framework for leading private market actors, and therefore these similar values towards mixed-use would be effortless to integrate (Adams & Tiesdell, 2010; Faludi, 2000).

In practice, however, this illustrates the divergence between planning and real estate, with planning instilling a long-term and reactive approach to implementation, and real estate instead immediately proposing new schemes including walkable, multi-functional neighborhoods. I have observed this divergence in my doctoral research with real estate actors quickly pursuing mixed office, retail and residential schemes, and planning embedding multi-decade, master-planned visions that encompass entire cities and regions. More precise evidence of this is in post-pandemic transitions of office districts to mixed-use areas in major cities, wherein newly generated masterplans aim to contend with an oversupply of office space, and undersupply of residential units (Machline et al., 2023, p. 45). Planning strategies such as these are confronted with the lack of profitability and thus unable to materialize in an urban development climate that is heavily market-led (Mazzucato, 2011). I argue that the market-dominant environment, coupled with planners unable to 'see themselves' as market actors, results in planning critically assessing property actors, even if both disciplines began with the same intentions (Adams & Tiesdell, 2010). With market-oriented mechanisms taking precedence, projects are then often critiqued by planning studies for falling short of initial plan visions.

In order to begin resolving the gap between planning and real estate studies, I began by gaining a thorough understanding of the different components and structures of marketized elements of the built environment using mixed-use developments. Through my PhD research I have found that different projects will scale, combine, and marketize these different components of mixed-use to varying degrees. Schemes can consist of new, luxury residential-anchored neighborhoods to post-pandemic central business district transformations, each leveraging mixed-use to attract and retain growth. I believe that with more solidified market knowledge from real estate studies, planning can understand the catalysts behind these schemes, and more thoroughly understand where to intervene.

Real estate actors primarily behave against risk and use both technical knowledge and insights from existing relationships to understand how their projects will be successful in a complex and changing landscape. Planning itself is classified as a risk in practice by real estate market actors, specifically during land use changes and proposals for more flexible outcomes that do not already exist in regulations. This is common in mixed-use development and building repurposing where projects often require a change of land use applications, or the addition of new uses to existing buildings (Unsworth, 2007). As a result, accelerating the complexity and scale of projects further complicates planning risk, with the increasing number of actors, resources and stages of negotiation involved. Real estate studies places navigating planning systems as one of the most crucial components of development, as regulatory components dictate



where and what type of projects are permissible (Evans, 2004). Therefore, I assert that introducing broader viewpoints in planning studies in respect to development risk, can help better understand project complexity, the positioning of planning in respect to other actors, and how actors interact in the planning system overall.

Another component of real estate studies that I integrated into my planning research was property sector-specific quantitative methods including market analysis, financial and investment landscapes, demographic and economic analysis. As planning studies are focused on the broader political-economic landscape of built environment production, qualitative skills often take precedence and practitioner-focused quantitative methods are not at the forefront. Integrating market and economic analysis in planning studies can provide a better illustration of the actions of different actors and the resulting shifts underway. The inclusion of the role of understanding finance and investment in the development process would involve planning studies to go beyond the macro-approach of critical financial geography and embed practical applications such as sourcing funding and understanding different types of risk (Brueggeman & Fuller, 2016). This could help planners better understand market-based resources, challenge the forces of neoliberalisation, leverage counter-cyclical tools where necessary, and implement more successful planning-based solutions. The addition of these skills can allow future planning practitioners to better understand the financial costs of urban development, resulting in better preparation for overarching negotiation and master plan strategy.

Real estate development has become increasingly embedded in a building production landscape supported by internationalization and financialisation (Brill & Robin, 2020). I would argue that the planning system as a whole, faces the same tenets of neoliberalism of deregulation and market-centric policies (Peck et al., 2009). Deeper macro-level challenges that echo this similar all-encompassing nature are climate change and socioeconomic polarization, fostering a difficult and ambiguous landscape for planners. Mixed-use projects illustrate this with their initial planned visions for social, health, economic, and environmental benefits, yet resulting in replicated, commoditized environments found in any global city (Harris, 2017, p. 76). Through case studies in my PhD research, I have found characteristics such as a preference for multi-national chain businesses, standardized glass building facades, transitory public spaces, and a lack of social and public services, as ubiquitous features that contribute to this commodification. These more micro-level observations can be linked back to overarching market forces, establishing a trajectory that can be used for interventions for better envisioned outcomes, and tackling other pervasive challenges.

In addition, the scale of these projects is unique in being able to offer strategic opportunities for coordination, conversion of underutilized land as opposed to building on greenfield, leverage of existing infrastructure for adding residential and employment density, and specifically entry for planning intervention for affordable housing (Harris, 2017, p. 86). Prominent examples are Hudson Yards, New York, Ørestad, Copenhagen, and Zuidas, Amsterdam which all host regulatory agreements to embed below-market-rate residential projects (ibid). Larger scale initiatives such as West Kowloon Cultural District, Hong Kong and Canary Wharf, London built up along reclaimed industrial waterfront that was otherwise unused (ibid).

Combining my academic research and industry observations, large-scale mixed-use projects will remain sought after and continue to impact future urban growth. As a result, opportunities for planning to shape local real estate markets, and permeate socioeconomic and environmental strategies at this scale, will also continue to expand. I firmly believe that assessing more proactive approaches, deeper market knowledge, and a comprehensive understanding of actor



behavior and risk profiles, can positively evolve perspectives in planning studies and influence future practitioners.

In both my doctoral and industry research practice, embracing both planning studies and real estate studies has provided a much richer understanding of real estate development. This has furthered my own legitimacy as a planner, which I often questioned with planning studies negatively categorizing private sector-led development (Sturzaker & Hickman, 2023), and early career experiences at the crux of these two fields. I encourage planning students and practitioners to follow the evolution of real estate studies, to be able to confront and catalyze development processes where needed. Planning studies must also offer the same confidence and tools for practitioners to implement their own visions and solutions, and practical interventions for change.

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## Notes on Contributor

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## Exploring Real Estate Literature to Analyze and Make Sense of Complex Planning Cases in Latin America

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In Latin American and, more specifically, in the Mexican context, urban planning, real estate development and heritage conservation policy instruments, institutions and implementation processes traditionally have been fragmented. This fragmentation in policy instruments and their implementation was showcased as prompting negative social outcomes for housing accessibility and tenure in historic areas within Mexican cities (Lopez Franco, 2021). This complexity in planning was generally unknown to me as an architecture undergraduate, but became increasingly evident while working in urban planning consultancy. Later, through a masters’ studies in Conservation of Heritage Monuments and Sites, this situation became worrying as it became clear that planning complexities related to real estate and heritage conservation fields have resulted in poor urban, economic, political, social and environmental conditions for historic areas. During my PhD studies, which aimed to investigate housing displacement processes in Mexican historic centers following urban regeneration agendas, interviews with government officers, academics and local communities were undertaken. This was a relevant step in the research as they shed light on processes to access context-based real estate literature and data to make sense of complex planning processes and outcomes within historic sites became imperative.

Despite formal initiatives such as UNESCO’s Historical Urban Landscapes which intends to link heritage planning to the UN’s SDGs (SDG11), urban conservation planning is not yet fully established globally. As a professional in the planning field in Mexico, I have understood that urban conservation planning is still being defined and formed conceptually and legally in Mexico. This has been exacerbated by the fact that heritage conservation is still to integrate urban conservation concepts and tools, like the toolkit set forward by the Historic Urban Landscapes (HUL) Recommendation to be in line with the UN’s Sustainable Development Goals (through SDG 11) (Pereira Roders, 2019). Meanwhile, urban and housing development planning instruments have been faster in integrating these same concepts with a discursive aim to achieve compact, sustainable and more livable cities. There is a disparity between urban, housing and heritage planning policies. They have been fragmented at national, state, and local levels. This has resulted in uneven permitted actions for real estate developers in historic areas, which have impacted on the social dynamics in these areas.

Yet as I progressed in my doctoral studies and afterwards, it became clear that it was not urban planning or heritage conservation that were in control of the urban processes and dynamics in historic centers. While literature that places planning as an enabler of real estate development has been widely produced, it was not easy to find literature in the real estate field

to contextualize the role of real estate dynamics in shaping policy instruments and implementation processes in historic areas in the Mexican context. Moreover, critical heritage studies literature has delved into the challenges of heritage commodification within neoliberal planning agendas for historic areas, with varying results from social and residential displacement to touristification and gentrification challenges (Harvey, 2008; Labadi, 2016; Lafrenz Samuels, 2010; Starr, 2013). Short and Livingstone (2020) have aimed to assess these processes by situating the outcomes as derived from planning instruments, as they protect or enable the real estate sector to advance commodification processes. Delgadillo-Polanco (2008) has stated that public investment has been articulated in service of ensuring private sector investment.

In my current role as an academic in Guadalajara, and as a local activist for the right to housing, I became aware of the role of real estate development in planning and heritage conservation decisions and the poor outcomes for low-income groups from these processes. Generally, in Mexican cities the different timelines between urban planning, heritage conservation and real estate have been evidenced by different projections, decisions, transactions, and outcomes. However, policies have been aligned as part of a common discursive trope to guide a development agenda. Since 2008, planning, heritage and real estate efforts have become united to undertake a 'recovery' of historic areas from degraded conditions. Yet, as a result of these projects, poor housing outcomes for longstanding population groups, along with increased rent and living costs, and widespread residential displacement to peripheries have been observed. These outcomes have been associated to a discursive dependency of planning and heritage fields to attract private investment interest. Among activists and academics, it has been stated that current real estate projects operate with no considerations or restrictions to assess social and urban impacts.

Foucauldian Discourse Analysis, assisted by quantitative and qualitative data, was key in my PhD and ongoing research to understand aligned interests of seemingly fragmented agendas and their adverse residential displacement implications for local populations. This analysis helps us to understand the overlap between the three fields of real estate, planning and conservation (Lopez Franco, 2021). Overall, spatial and imaginary mechanisms could be linked to the social and urban outcomes of discursive statements (Khan & MacEachen, 2021). This was exemplified by discursive (including spatial, normative, cultural, and economic) mechanisms related to previous negative notions and respective linguistic tropes of historic areas, as well as the shift towards renewal potential in the areas. For example, the linguistic structures used to refer to historic areas could be traced in past, present and future tenses to assess real estate agendas: a historically negative narrative could be transformed from 'dereliction' to 'investment potential.' This could be seen as a discursive theater stage in which evolving narratives and future expectations are positioned to articulate a 'moment' in which planning, heritage conservation and real estate agendas may align. Moreover, by accessing historic changes in rental data within historic centers and comparing them to historical patterns of public investment in the areas, a correlation between higher public investment and increased rent formality was found. However, despite a linguistic and discursive aim to repopulate historic centers through increased real estate investment in the areas, local citizens have ascertained increased residential displacement dynamics. These dynamics have been described as involving increased area costs, increased housing unit rental prices and even direct evictions to redevelop degraded buildings and attract middle-class or transitional residents (ie. Airbnb users).

While it was through a mostly qualitative methodological framework that I made some sense of the work I was undertaking, it became imperative to acknowledge quantitative approaches in the real estate field, to also understand the limitations of the work I was producing and the

difficulties it might face within the real estate academic field. In this search, much of the urban planning and real estate studies to assess housing displacement implications responded to formal economy-based global-north financialized urban landscapes (Sassen, 2009). Mexican academics such as Delgado, Salinas Arreourtua, Perez-Campuzano and Gasca Zamora have been delving into financialization and gentrification-derived processes within Mexican urban contexts from an economic perspective. Yet, Mexican historic centers respond to complex landscapes where formal and informal economies intersect with heritage, planning and real estate fields in historic centers, as places with characteristics and planning challenges similar to those found in urban slums (Lombard, 2014). Because of this, traditional economic approaches or even widespread gentrification definitions must be revised to assess Mexican historic centers. For instance, gentrification in its purest meaning is not happening within Mexican historic centers and has proven a disappointment for local governments and developers who expected higher-income groups to replace low-income populations (Betancur, 2014).

By using Foucauldian Discourse Analysis to position spatial and imaginary mechanisms, it became clear what type of real estate-oriented literature and data my work needed to assess complex planning processes. However, while exploring real estate literature within a planning-based research design proved difficult, finding relevant literature that also provided insights into the complexities between planning and real estate within a developing country was very challenging. A mixed methods approach to understand residential displacement processes within Mexican historic areas with informal economy characteristics provided a good setup to visualize the shortcomings as well as contributions from planning and real estate fields. This contribution argues for common spaces where real estate and planning academic fields can therefore share knowledge. It would be encouraging to motivate young and established academics to comprehend and communicate as well as explore the different methodologies at hand for each field.

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## Notes on Contributor

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## Engaging With Practitioners: Incorporating Dialogues With Real Estate Actors Into Planning Discourse

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This contribution discusses how insights from real estate literature and direct engagement with real estate actors help to face the challenges and complexities of redeveloping abandoned public-owned land through public-private partnership (PPP). This text is based on a reflection derived from my 10-year working experience in academia (since 2014) and constant interaction with the agents involved in planning the conversion of former military sites into civilian use –i.e. the Ministry of Defence (MoD), State Property Agency (Agenzia del Demanio in Italian), City Councils, and real estate funds. My main goal has been detecting the factors that make the redevelopment of former military land in Italy complicated, and possible solutions to solve them for generating new collective-oriented uses based on a historical perspective.

The Italian Court of Auditors has demonstrated that these redevelopments are difficult to perform since the first disposal program launched in the mid-1990s (Corte dei Conti, 2017). The State body found that between 1997 and 2016, the MoD tried to sell 27% of its total estate (1,800 sites out of 6,700). However, 1,146 of these properties (64%) did not present the proper characteristics for implementing real estate developments (e.g. large pieces of contaminated land with protected heritage in remote locations). In addition, externalities such as the endless

adoption of new regulations with the introduction of new procedures and programs often in contradiction with each other, and the 2007–08 global economic crisis added more complexities that contributed to preventing their redevelopment (Corte dei Conti, 2017, pp. 13, 29, 37).

International planning literature confirmed that what has occurred in Italy also happened abroad by stressing two key elements: first, the tendency to apply a profit-driven logic to the redevelopments to supposedly create benefits for the owners and promoters framed within growing cuts in public expenditure (Bagaeen and Clark, 2016). Second, insufficient engagement with local communities (Touchton and Ashley, 2019) because of the basic driver of the operations on former military sites being top-down imposition for generating much-needed income. The first approach has shown poor engagement with the specific features of real estate processes such as the correct selling price of a polluted military land that discourages real estate agents to buy it. Within the second, planning literature has not explored details on the types of stakeholders, developers, and investors who are or could be involved in such operations.

I realized that planning studies were insufficient to disentangle the multi-faceted real estate dynamics and their interaction with planning practices in my research on military sites for two main reasons. On the one hand, the understanding of current real estate patterns should be based on an accurate historical inquiry into the city-making process under the lens of the real estate dynamics in relation to planning guidelines. This analysis should start, at least, from the period in which military assets were built – in Italy after the Unification in 1861. While urban historians detailed the period from the mid-19th century until the beginning of WWII (Insolera, 1989), I realized no analysis created a continuous narrative until today. On the other hand, the disciplinary-based analyses lacking action-research approaches and inquiries into the relationship among stakeholders were another main shortcoming hindering better knowledge for disentangling current opportunities and obstacles of redeveloping MoD sites through PPP (Ponzini & Vani, 2014). I found that planning studies apparently fail to simultaneously investigate and solve the issues affecting the redevelopment of military land due to the disconnection with real estate.

To overcome this deficit, it is necessary to perform three different steps. The first step relies on Álvarez Mora's (2004) ideas, which argue that the real estate operations on land such as military sites follow the latest trends of the production of the built environment. Consequently, the essential task to perform is historical analysis of how the military sites' surroundings have been created. This kind of study helps to detect the real estate patterns affecting the development of a specific case study area in connection with planning tools, for instance in the drafting process of a municipal spatial plan. The theoretical basis of this stage is envisioning military land as a 'property' in terms of land ownership. I use the notion of property here as a producer of an 'income' for the owner, the so-called 'ground rent,' as a 'capital in land' capable of undertaking real estate developments not immediately foreseen in the short-term, but in the medium-long term. In terms of planning, this means that a specific property can be allocated as 'land for redevelopment,' whose owner can wait for the most ideal time to generate high profits.

The second step is a study of the interrelation between actors, land use policy, and governance, and their evolution over time (Squires et al., 2018, p. 353–409). To do so, I carried out the review of scientific and grey literature and archival research. The output of the first two steps is the understanding of three main elements. First, the strict connection between the historic real estate trends in the military land's surroundings; second, the evolution of the disposal policies based on the national legislation; third, the spatial planning contents; and the claims of the agents involved (at the state and local levels, such as public authorities, citizens, private agents in the realm of the real estate).



Finally, the third step has been constant dialogue with the aforementioned actors. Among the criticisms, real estate agents highlighted the continuous legislative novelties and the consequent launch of new redevelopment programs, the unstable real estate market trends, and the poor communication between the actors involved. According to this situation, the suggestion I received was to create an inventory to detect the main features of the redevelopments on a case-by-case basis. What came out of these conversations was the need to perform work aimed to understand the dichotomy between the creation of profit-driven spaces based on the existing legislation and the provision of urban commons to satisfy citizens' needs, and the role played by the actors involved.

This three-step research based on real estate literature and engagement with practitioners opened the way to understanding the dynamics affecting the redevelopment of former military sites in relation to the production of space, as well as other types of contaminated/previously developed land. Therefore, based on my experience, I would recommend that planning studies supports interdisciplinarity by creating a symbiotic relationship with real estate, as I did in the methodology. Early-stage planning researchers can benefit from my work by applying the suggested three steps when dealing with the planning of contaminated/previously developed land, which is a theme strictly tied to property development processes. Doing so would mean enlarging the empirical base of the case study analysis and consequently lead to a deeper differentiation between types of developers and investors (public or private) and an understanding of their investment decisions. Eventually, in order to make real progress in practice and for researchers/how we theorize planning and real estate, planning education may provide guidelines to stakeholders, developers, and investors to balance opportunities and barriers in an attempt to equalize public and private interests.

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## Forging a Stronger Link: The Accelerated Integration of Planning and Real Estate Research Through the Covid-19 Pandemic

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The development of a post-pandemic workplace ecosystem for knowledge-intensive businesses on a city-regional or metropolitan scale requires insights from both real estate and planning studies. On the one hand, real estate studies provide a more detailed understanding of employee-workplace interaction which further informs organizational outcomes. Given that knowledge work is predominantly conducted in the indoor environment, the studies focused on the physical parameters and employee health and well-being help to better understand the role of buildings in contributing to the overall sustainable performance of our cities. On the other hand, planning studies provide a better perception of hybrid work practices in the wider city context, including travel patterns and preferences regarding home location, which have implications for future real estate market development. Also, planning studies help to examine hybrid work in the context of organizational behavior studies, e.g., differences in employee engagement levels across various city locations.

In light of the above, it becomes clear that the greater interaction between real estate and planning studies can substantially enhance our understanding of how and why the physical environment plays a role in creating sustainable workplaces with a focus on employee well-being. Thus, an appreciation of new post-COVID-19 urban development dynamics can substantially contribute to stimulating new thinking about how research on real estate properties in wider city regions or metropolitan areas supports hybrid work patterns to develop healthy urban livelihoods for greater resilience in the future.

I worked on my PhD project when the COVID-19 pandemic accelerated hybrid work practices among knowledge-intensive organizations across a wider urban realm. I noticed that this new dynamic was having an enormous impact on how the workplace environment should be conceived. For instance, the notion of the workplace expanded both physically and virtually; in other words, the ‘workplace’ needed to be considered on a much broader scale to

encompass an 'ecosystem of places' – i.e., home, office, and third places – as our work patterns were seemingly changing and evolving. I realized that this novel conceptualization of the workplace environment required substantial knowledge from both real estate and planning fields, accompanied by relevant studies in organizational behavior and environmental psychology. Therefore, new interdisciplinary research was needed to disentangle the resulting complexity.

My PhD research focused on the mechanisms underpinning the development of an 'engaging' workplace ecosystem for hybrid work practices (Surma, 2023a). I explored the relationship between employee engagement and the workplace environment – understood as an interconnected network of different physical workplaces. However, I observed that research on the workplace environment had long been focused on full-time work in the office environment in dedicated business areas where knowledge work traditionally occurs. Hence, real estate studies were predominantly interested in the indoor environmental characteristics of commercial real estate (Feige et al., 2013), whilst planning studies were focused on the development of central business districts and suburban business parks where knowledge-intensive organizations agglomerate. However, the post-pandemic workplace ecosystem stretched the interaction between the user and the city from central urban areas to the confines of our homes and other peri-urban purpose-built workplace environments. Despite some evidence in the scientific literature of studies conducted specifically on remote work (Brynjolfsson et al., 2020), the research on hybrid work conducted in the networks of distributed workplaces within the wider urban context was limited. Although there was a growing interest among urban planners in the home environment post-pandemic (Carmona et al., 2020), little was known about how to successfully plan the whole workplace ecosystem, including residential areas and third places, for 'engaging' hybrid work practices.

In my work in the Greater London Area, this was scientifically challenging. Because my research on the workplace ecosystem lay at the intersection of real estate, planning, and organizational behavior studies, I had to undertake an appreciation of this complexity. My collaborative research with the International WELL Building Institute (IWBI) showed that when workplaces are considered in a variety of scales as an interconnected system of physical environments beyond major urban economic centers, the extent of their impact on more sustainable and healthy livelihoods expands. This includes consideration of improved home quality, access to community/peri-urban green space, sustainable transportation, etc. (Surma et al., 2021). Therefore, I would argue that the new post-pandemic urban dynamics of workplace ecosystems raised new questions about interdisciplinary research linking real estate and planning studies more efficiently for greater social, economic, and environmental benefits.

My data analysis in collaboration with global businesses confirmed that employee engagement cannot be simply understood through the lens of corporate office design alone. There was a far greater need to look at, for example, urban design in terms of workplace (real estate) certifications. My previous research with IWBI indicated that workplace standards were predominantly focused on indoor environmental qualities at the expense of outdoor environments. The new post-COVID-19 interdisciplinary lens shows us that this is lacking because we foresee greater employee mobility across both types of environments in the future workplace ecosystem. Also, this research showed that office designs must efficiently coexist with other urban qualities such as transportation and access to amenities, which have not been incorporated into workplace metrics yet. But again, this needs greater collaboration between real estate *and* planning researchers to help elaborate relevant real estate criteria, such as housing

quality, in the context of a wider consideration of urban characteristics that may include the location between the home and the office, public transportation, and the quality of outdoor environments.

The COVID-19 pandemic has demonstrated that the way we live and work determines how we use the space around us (Surma, 2023b). This is especially visible in the context of knowledge-intensive organizations that allow much greater flexibility compared to more traditional businesses. This 'flexible' model primarily refers to the hybrid nature of work that is spread between the home and the office, with the occasional use of third spaces, such as cafés and libraries. The ongoing model of 'flexible working patterns' has been widely adopted by organizations and has been accepted by their employees (CBRE, 2021; Cushman & Wakefield, 2020).

These post-covid hybrid work patterns have substantial implications on how our cities should be designed, including wider access to an Internet connection and possibly shorter distances between the home and the office. Although office qualities will remain important, the new model of working can shed light on its linkages with the rest of the city, such as the availability of housing infrastructure at a relatively close distance. For example, there is a significant reduction in work commutes (Laker, 2021) that are highly demanding for both employees due to decreased personal well-being and less productivity, as well as for city infrastructure capabilities because of peak hours. Additionally, we need housing areas located near office districts, sufficient room(s) for home offices and flexibility in planning regulations for offices in gardens.

All the issues described above have consequences for future planning studies. For instance, incorporating real estate insights regarding current projections for future post-COVID-19 office space demand can facilitate better planning practices. For example, future planning studies should reflect on the consequences that determine the extent to which communities can be more sustainable and prosperous – especially considering how hybrid work practices incrementally change the way we work and live. Therefore, more interdisciplinary research is needed to explore how people utilize such an ecosystem of places, including both their working time and work breaks, and how these interactions impact the future development of our cities. The pre-pandemic urban planning concept of '15-minute' cities offers some insight into the utility that is inherent to attractive workplace ecosystems with stronger local communities and minimal travel among housing, offices, restaurants, parks, and cultural venues (Yeung, 2021).

The newly emerging and slowly establishing network of workplaces can potentially increase cities' resilience. However, greater distribution of workplaces would demand better logistics and well-planned linkages ensuring stability for the whole system that will also minimize additional and unnecessary travel. Moreover, the ongoing debate on more distributed workplaces can be well adapted to more compact, flexible, and sustainable cities (Deloitte, 2021). Still, the intersection of real estate development and planning studies will require a more holistic and transdisciplinary approach inclusive of other disciplinary fields such as organizational behavior, environmental psychology, and transition studies. Only then, can we fully understand how emerging human-urban interactions are aligned with new hybrid work patterns post-pandemic.

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**Martyna Joanna Surma** holds a PhD degree in Real Estate and Planning (Henley Business School, University of Reading, UK). Alongside her ongoing work at the time, Martyna was awarded the Accelerating Business Collaboration Grant funded by the Economic and Social Research Council via the University of Oxford, which determined the implications of hybrid work patterns for sustainable property markets in a wider city context. Martyna is a Research Associate (School of Architecture and Environment, University of the West of England, UK) for the Biurbs project (funded by the UK Research and Innovation), which aims to improve our understanding of the economics of biodiversity in new developments. Email: [martyna.surma@uwe.ac.uk](mailto:martyna.surma@uwe.ac.uk)

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## Researching in the Intersection of Planning and Real Estate – A Call for a Hybrid Approach

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Researchers interested in navigating the waters between real estate and planning may encounter a turbulent journey ahead. Conflicting theoretical and epistemological stances, incompatibilities in

scientific language, and differences in setting up hypotheses are some of the hurdles to be faced. In this contribution, I describe my journey conducting doctoral research in real estate, having been previously trained in a planning school. As the completion of the Ph.D. degree approaches, I draw insights into the differences but also the opportunities emerging from the combination of the two areas. My goal here is to campaign for more empirical investigations employing a hybrid quantitative-qualitative methodological strategy that acknowledges the benefits and setbacks of both approaches in answering research questions concerned with the built environment.

Although many authors have pointed to the necessity of reducing the distance between real estate and planning (such as Brenner and Schmid, 2015; Cassinari and Moulaert, 2014), very few succeed in developing combined methodological approaches. Part of the reason preventing these boundaries from dissolving can be attributed to distinct epistemological principles employed by each area, which, consequently, translate into contrasting methodological approaches and their respective research languages. In most cases, real estate journals tend to prioritize quantitative studies with clear hypothesis testing and well-defined objects of investigation (as illustrated by Oyedokun in this *Interface*). In contrast, spatial planning journals draw more on descriptive analysis, focusing on theory construction through inductive reasoning. In my experience, the differences and specificities of each of these two approaches were far from being tacit and understanding one clearly helped also understanding the other.

In qualitative research, assumptions are based on the hypothesis that social phenomena are inherently complex. Although their individual components can be identified, it is through their intertwined arrangement that such phenomena can be explained. Methods such as case studies, interviews, focus groups, and ethnography are frequently used to describe these events, as they emphasize a holistic observation of socio-spatial situations, a detailed description of facts, and methodological flexibility, which is not constrained by standardized procedures (Creswell, 2012). The isolation of variables and the measurement of their effects are uncommon – if not incompatible – with this approach. In reality, there is a constant effort to elevate empirical evidence from real-world situations to a level of theoretical abstraction by embracing the complexity observed within social reality (Audi, 2010). This inductive approach tests the consistency of concepts and theories by systematically applying critical thinking to common trends emerging from multiple observations.

Researchers in planning are more familiar with qualitative methods (Dandekar, 2005; Tomaszewski *et al.*, 2020). Many of their endeavors involve collecting primary data through interviews, questionnaires, and cartography techniques. They also provide an extensive and detailed description of the historical and institutional context of the studied reality (Creswell and Poth, 2016). For instance, whilst undertaking my M.Phil. degree, I interviewed housebuilders on their views of how development fees interfered with their business models. This investigation aimed to critically evaluate the introduction of this planning mechanism by looking at one particular actor and their behavior: the developers. As in the case of qualitative research (Woo *et al.*, 2017), I had little expectation regarding the form and magnitude of empirical results from the interviews, and more attention was paid to identifying industry changes.

In contrast, real estate studies benefit more from deductive approaches, which test the predictive capacity of existing theories using secondary data and statistical methods. This approach constantly seeks to find correlation and causal relationships between quantifiable variables and is usually concerned with isolating the individual effect of the phenomenon from all other confounding elements. Studies estimating the impact of spatial features or regulations on market outcomes (prices, yields, housing supply, demand dislocation, etc.) are among the most

common assessments in this field. Additionally, this approach manipulates and interprets trends within the broader scope of markets and urban economic theories, such as studies on hedonic pricing composition. Such approach in real estate research benefit of extensive and systematically organized data that allow for the application of statistical methods, such as real estate transaction data, residential and commercial production, and asset securities trading (Haining, 2014).

Qualitative researchers unfamiliar with the premises in quantitative studies – like myself during early years in the PhD – are likely to criticize its positivistic view of the world and its attempt to generalize findings based on the measurement of social phenomena. It took me time to realize that quantitative approaches attempt to explain synchronized behaviors in datasets randomly selected through the power of probability and explain them using existing theories. The primary assumption for any quantitative model, however, is the recognition that it is practically impossible to fully explain any social phenomenon solely through a set of measurable variables in hand. And because of that, in most cases, quantitative researchers spend a great deal of time testing the validity of their methods and exploring counterfactual scenarios. Singularities and anomalies that may characterize individual cases are usually described in terms of deviation from the mean, and estimation techniques incorporate these aspects into statistical accuracy and measurement of the error term (Bao, 2014).

These two epistemological traditions in social science are often seen as dichotomous, with researchers tending to cluster around either extreme (Creswell and Plano Clark, 2007). With few exceptions, this is also the case in planning and real estate scholarship. Being allocated within the Department of Real Estate *AND* Planning at the University of Reading, I could witness many instances in which criticisms from planning scholars condemning oversimplification and a lack of critical contextualisation in real estate studies would be responded with criticisms of their loosened rigor in empirical procedures and biased interpretations. Without trying to resolve this conundrum, it became evident that difficulties in understanding methodological paradigms from one side result in underestimating research findings from the other. More strikingly, the obstacles to further collaboration and debate come in the form of two entirely distinct academic languages. The lexical apparatus from quantitative studies can be overly technical and, simply put, rather unengaging, whereas the overload of theoretical concepts in qualitative discussions is hard to keep pace with.

I argue, nonetheless, that underneath this seeming polarization lies promising opportunities for researchers interested in the dynamics around the built environment to explore the complementarities between the two fields and their combination. The nature of the interaction between real estate and planning practice in the real world can be seen as a sufficient justification for a joint investigation strategy. The two areas are in constant interaction, with the real estate industry being a heavily regulated industry responding according to multiple institutional factors (Ball, 2003) and planning being an intermediary government function having its goals heavily reliant on private actors' decisions in land and property markets.

Based on this experience, I opted to employ a hybrid methodological approach in my PhD as an alternative to explore both the complex nature of the housebuilding industry looked at from the planning perspective and the causality relationship between regulation and market outcomes. With this approach I aim to unveil housebuilders' behavior through a bifocal lens that, on one hand, uses empirical tools to zoom in on causal relationships between planning and markets that can be expressed in terms of quantifiable variables, such as housing supply volumes and prices. On the other hand, I aim to zoom out and put these empirical findings into perspective concerning the complexity through which the housebuilding industry operates,



highlighting the role of the planning process within this structure. I expect that gaps and limitations in describing local market dynamics should, therefore, be complemented by detailed interpretations of the socioeconomic context, the role of institutions and the different behaviors amongst actors.

With this, my goal is to test hypotheses based on expected behavior from market indicators, for example, by demonstrating that housing supplies positively respond to regulatory flexibilization and that price elasticities vary given location attributes- findings that can easily be explained in terms of mainstream economics. But equally, this approach allows me to explore how changes in local planning regulations affect the equilibrium across all the institutional structures sustaining the industry's organization, such as land market competition, firm size differentiation and shifts in housing submarkets. Ultimately, a hybrid approach will provide me with methodological insights not only to estimate the magnitude of regulation changes on housebuilding but also explain the *how's* and *who's* through which changes occur. These are the necessary parameters for a holistic policy evaluation.

In conclusion, I hope that, with my experience in conducting research in the intersection of planning and real estate, I can encourage more hybrid methodological approaches interested in revealing the interconnections between these two fields. Specifically, I advocate for the dissemination of methodological strategies whereby quantitative methods are used to identify general trends and macro-level influences in association with complementary qualitative studies that can describe the socio-economic and spatial elements in market and government dynamics. Such an approach facilitates triangulation, integrates primary and secondary data, and mimics real-world scenarios in a more realistic form.

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## Crossing Boundaries in Real Estate and Planning Research and Why it Matters

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This insightful collection, curated and coordinated by Sara Özoğul, delves into the challenges, innovations, and resourcefulness of early career researchers navigating the intersection of planning and real estate. The contributors reflect on what it means to conduct critical academic research in a context in which established boundaries between state and market are increasingly blurred and in which there has been an intensification of finance-led forms of planning (Germán & Bernstein, 2020). As an academic endeavor it showcases the dynamic landscape of research in this domain and sets the stage for critical debates on the vital theme of interdisciplinarity within planning studies. Simultaneously, it encourages us to stretch our limits and maintain an open-minded approach, all while retaining the critical dimension of our thinking. As indicated elsewhere (Taşan-Kok, 2019), this requires critical constructive thinking in planning studies by seeking answers, exploring alternative solutions, and developing new approaches and methodologies while maintaining a critical mindset. It is a process that entails continuous reflection and revision throughout the research process. In that respect, the collection is an invitation for academics to push boundaries not only through new interdisciplinary approaches, methods, and research but also by narrating a critical constructive point of view.

Drawing from the diverse contributions of authors, we categorize three overarching findings that emerge from the rich tapestry of their research experiences:

1. **Diverse approaches to engagement:** Researchers should adopt a versatile and proactive stance in their engagement with real estate and planning. Yinnon Geva highlights the multifaceted ways engaged scholars can contribute to public planning, emphasizing the importance of shedding light on market-oriented approaches, creating case studies for a broader audience, and actively supporting community-based initiatives.
2. **Integrating quantitative and qualitative methods:** There is a necessity for incorporating robust market and economic analyses into planning studies, providing a quantitative foundation for more responsive interventions in the ever-evolving real estate landscape. Mariam Hussain and Monica Lopez Franco underscore the often-neglected quantitative aspect in planning studies, urging for integrating numeric arguments. Simultaneously, as emphasized by Tunbosun Oyedokun, there is a necessity for recognizing qualitative insights derived from urban planning and incorporating qualitative methods into the realm of real estate research.
3. **Holistic understanding of planning practices:** Researchers also emphasize the importance of navigating the intricate dynamics of real estate and planning with a comprehensive and nuanced perspective. Several authors commented on this aspect. Federico Camerin's three-step approach emphasizes the need for a holistic understanding of contemporary planning practices, including historical analysis. At the same time, Kaio Nogueira suggests a hybrid approach that provides insights into broader industry dynamics, enabling a comprehensive understanding of effective policy evaluation. Similarly, Martyna Joanna Surma mentions a holistic and transdisciplinary approach to involve disciplines such as organizational behavior, environmental psychology, and transition studies to understand human-urban interactions.

Navigating a scholarly environment where radical and critical approaches hold the highest value and publication preference makes it challenging to establish a constructive standpoint on real estate research. Despite a shared acknowledgment of the pressing need for more nuanced and comprehensive approaches, critical analyses of real estate markets often remain one-dimensional. Dissatisfaction with the current state of real estate market research in urban studies is voiced not only by Theurillat et al. (2015) for various reasons but also due to a notable gap in understanding the perspectives, actions, and strategies of property dynamics and actors within the planning and urban studies.

There is therefore an urgency to develop empirically-rich and conceptually-driven research on how property markets work, who the key actors are, and what drives investment and development. However, conducting such research and gaining academic recognition creates formidable challenges, as observed by the collective sentiment among the authors. Tunbosun Oyedokun shares valuable insights on overcoming methodological challenges, advocating for collaborative planning and cross-disciplinary data analysis. Our own experiences echo the importance of fostering collaboration between planning and real estate experts and the significance of open-mindedness among grant and journal reviewers. This reinforces that early career researchers must navigate challenges with resilience, innovation, and a commitment to interdisciplinary collaboration.

One way forward is to break down simple dichotomies and prejudicial filters between 'state good' and 'market bad' planning. Research findings should always be able to take thinking in unexpected directions but it can take courage to publish findings that tackle established norms and conventional wisdoms. Carefully teasing out and analyzing the social relations of the real estate sector opens up alternative ways of thinking. Recent writings by Levy et al. (2021) for

example, patiently examine the role that local, place-centered developers play in urban development projects in New Zealand. As they note:

They are strongly place-attached, have a sincere desire for their town-centre to thrive, and have personal wealth and sustainable financial resources behind them. They are willing to invest in their town's future at the risk of, at least initially, less-than-optimal financial returns, but believe that their investments have the potential to bring long-term benefits to the town and a future financial return for them. (p. 105545)

These insights chime with those found in real estate writings that highlight the genuine challenges and complexities of investment and development processes and the real-world costs and harms that individual entrepreneurs and firms can face in going about their business practices (Baum & Hartzell, 2012; Brill, 2022).

Moreover, there needs to be more acknowledgement that all models of governance are prone to failures (*cf.* Jessop, 2016) and sometimes it is planners, politicians, and planning systems that generate negative outcomes for residents and communities. It is not always the schemes proposed by developers and investors that undermine the economic and social foundations of places and citizens' lives. Again, Levy et al.'s (2021) work is instructive here and their exhortation for planners and policy to find 'new approaches ... to help local actors to engage more capably, cooperatively and collaboratively with all property developers, including those with a benevolent entrepreneurial orientation' (p. 105546).

Given these wider trends, there is a strong need to encourage early career researchers to adopt versatile approaches to engage with market-oriented practices and systematically examine in-depth case studies. There is also a need to emphasize the importance of integrating numeric techniques and forms of analysis into planning studies, equipping researchers with the skills to conduct robust assessments of market processes and the direct impacts of regulatory systems and structures. At the same time, scholars need to welcome holistic and transdisciplinary qualitative research methodologies and approaches. Moreover, we need to encourage researchers to explore the historical, ongoing, and future dimensions of real estate and planning interactions.

Finally, we acknowledge the challenges of publishing in the intersection of real estate and planning, where the appreciation often comes after rigorous review processes. We recognize the struggle to meet diverse expectations from within and outside the field. The review process for scholarly work on the intersection of planning and real estate studies can be exhausting and frustrating. However, we have both experienced the rewarding moment of having our publications recognized post-review. We encourage aspiring researchers to persevere, emphasizing that the significance of this field will become increasingly evident over time. and development strategies, and what the outcomes are for people and places.

In conclusion, the intersection of real estate and planning holds immense potential for shaping the future of cities. Early career researchers stand at the forefront of this transformative journey, armed with the collective wisdom and innovative approaches outlined in this collection. As we continue to navigate the complexities of this interdisciplinary realm, we invite scholars to join us to contribute to the ongoing critical debate on interdisciplinarity within planning studies. This requires braveness, patience, and fearlessness.

## Disclosure Statement

No potential conflict of interest was reported by the authors.

## Notes on Contributors

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