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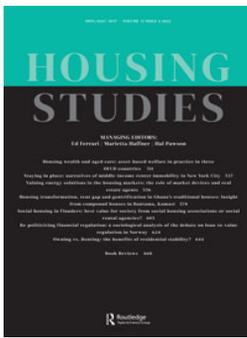
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Approach to housing justice from a capability perspective: bridging the gap between ideals and policy practices

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ABSTRACT

When correcting policies to tackle rising housing inequality, certain principles of housing justice are necessary. Recently, the capability approach to justice has attracted the attention of housing scholars, as promising guidance to compensate for problems in conventional policy approaches. However, the practicality of its policy application remains uncertain. This article suggests how to manage the issues creating gaps between the philosophy of the capability approach and housing policy practices, along the chain of essential questions of justice theories (which ideal institutions, metrics of justice, and distributive pattern rules?). Building on this reasoning, the article proposes that housing policy be guided by the changes in unjust housing situations in terms of people's capability for housing, instead of by absolute principles of distribution, or characteristics of welfare state/housing regimes. For evaluating housing capability, this article proposes to assess housing opportunities, housing securities and housing abilities. The article concludes with implications for the roles of comparative housing research in implementing the proposed approach.

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Introduction

In order to tackle rising inequality in housing, how should we correct the current housing policies? Answering this question needs certain principles, based on which we can judge whether the corrections are appropriate. Some useful ideas for such guiding principles can be drawn from theories of social justice, as their primary task is defining what society should aim to realize. Among the various approaches to justice, the capability approach (Nussbaum, 1988; Sen, 1980) has gradually attracted the attention of housing scholars due to its distinctive merits to compensate for

problems of conventional housing policy orientations. (Kimhur, 2020; Bengtsson, 1995; Clapham, 2019; Fitzpatrick *et al.*, 2014; Foye, 2021; King, 2003).

The core principle of the capability approach is that the ultimate goal of policy should be the expansion of capabilities of people to choose a life they value, rather than desire-fulfillments or possessions of resources, such as income, commodities and wealth. The philosophical foundation of this core principle provides a compelling argument for housing policies to move away from the problematic but unprecedentedly dominant housing phenomenon: the financialization of housing. This phenomenon has positioned housing as a commodity and object of wealth instead of as a basic component of human development and wellbeing; as a result, it has posed the greatest challenge to the realization of the right to adequate housing for all (UN Human Rights Council, 2017). Adjusting the ultimate goal of housing policy based on the capability principle has the potential to restore the human dimension of housing at the centre of the policy agenda. In addition, the capability approach was developed as a constructive response to problems in the conventional approaches to justice, such as utilitarianism, Rawlsianism, and libertarianism (Sen, 1992, 1999), that have substantially influenced the underpinning perspectives of housing policies.

There is a growing consensus that the capability approach could provide important guidance for correcting current housing policies. However, the practicalities of its policy application is in doubt (Batterham, 2020; Foye, 2020; McCallum & Papadopoulos, 2020). When debating these practicalities, however, one point is often overlooked: philosophical ideas of justice are not always directly transferable to practical guides for policy. Some intermediate steps are required, such as connecting vocabulary of philosophy and policies, or dealing with the gaps between ideals and real-life situations where the ideals are to be implemented. Before shifting the focus directly from capability ideas to practical solutions for housing policy, research should investigate what intermediate issues may exist, and how they should be appraised and managed. Research on such in-between issues, however, has been scant in housing literature. This literary gap has caused lingering doubts, and stalled progress toward appropriate solutions. The purpose of this article is to progress discussion on this topic.

When constructing principles of housing justice based on capability ideas— thereby helping in setting practical guides for housing policies—one of the key intermediate issues is that only partial guides can be drawn from the capability approach. Among the multiple questions of theories of justice, the approach only answers the questions ‘what should policies aim to distribute?’ and ‘what should be evaluated for understanding inequalities?’ It proposes the ‘capability’ metric of justice, but does not have a complete answer to other questions of justice theories.

To deal with this issue, a further two additional subjects have to be examined, namely, types of ideal institutions and distributive rules. This article scrutinizes them, adding to the metric of capabilities for housing. Thus, the article examines the following three essential questions of justice theories in the housing context to formulate guides for housing policies from a capability perspective: (a) what kinds of institutions should society aim to establish for realizing social justice? (characteristics of ideal institutions), (b) what should the society distribute to reduce inequality? (metrics of justice), and (c) what level of their distribution should the society aim for? (distributive pattern rules).

Competing theories of justice differ from each other according to the respective theorist's stance on each subject, and therefore, answers to these questions would form a base framework of justice in housing.

When examining these essential questions of justice, however, there is a common issue to resolve first. Even if each question is answered, and thereby some ideal principles of housing justice are identified, when implementing them, some gaps can exist between those ideals and the realities of housing policy practice. There should be a thorough examination of whether such gaps can occur, and if so, how they need to be managed. The starting point of discussion for each question will thus be clarifying the possible gaps between ideals and housing policy practices, and then discussing how to manage them. Through this reasoning process, the article proposes an approach to guiding housing policies based on a capability perspective. The proposal in this article remains theoretical, but closely connected to real-life housing issues, as the reasoning is rooted in observations of actual housing issues and their surrounding circumstances.

The remainder of this article is structured according to the three essential questions of justice theories above. Questions are scrutinized separately, but the conclusion of each leads to the starting point of discussion on the next, and thereupon, an approach to housing justice is proposed. Since this article discusses several sub-subjects and draws conclusions by interweaving them, it is necessary to introduce how the discussion of each sub-topic and their conclusions are linked. Before moving on to the next, the below briefly outlines how the discussion will proceed, with some highlights on the discussion focus.

The chain of discussions

In the first section, (a) characteristics of ideal institutions, an expected point of discussion might be selecting the ideal institution type for expanding capability for housing, but, the section discusses a more foundational question: whether theories about ideal institutions would indeed provide useful guides for housing policy. Among the various kinds of institutions influencing justice (e.g. state, civil, and customary/informal institutions), the section discusses state institutions that have been a dominant subject in European housing discourse, where the types of welfare states and housing regimes have been major references for debating corrective measures. Some limitations of this approach are critically examined, and in turn, an alternative approach is suggested: guiding policy by referring to the changes in unjust housing situations. In this approach, evaluation practice becomes crucial, and consequently, it turns our attention to the next question, (b) metrics of justice.

In this second section, capability for housing is thoroughly examined. An ideal of the capability approach is a society that expands the capabilities of individuals to the maximum, and that minimizes inequalities in the capabilities. Monitoring changes in capabilities requires evaluating the potentials of people to choose valued lives, but in practice, direct measurements of such intangibles are nearly impossible. Evaluation of capability may need to assess some variables that are somewhat distinguished from the ideal concept of capability. The section first clarifies the

capability concept and respective ideas of justice, and then proposes an evaluation approach: that is, evaluating housing opportunities, housing securities, and housing abilities that shape the extent of capability for housing.

For the last question, (c) distributive pattern rules, the starting point of discussion is linked back to the review on aspects of the capability concept in section (b), because pertinent types of distributive consideration vary by the aspects, hence different choices of rules. This analysis then examines how the question about a selection of distributive rule should be managed when setting guides for housing policy.

Finally, an approach to housing justice is proposed. The article concludes with suggestions for the roles of housing research in implementing the proposed approach.

(a) Ideal institutions: what type of housing regime is ideal?

The issue of increasing housing inequality is often connected with problems of the neoliberal housing regime, as critically discussed by Clapham (2019). Thus, some may argue for establishing a universal housing regime of social-democratic welfare states instead of a selective/residual housing regime of liberal welfare states, by following Kemeny's (1995) typology of housing regimes. When discussing policy directions in housing research, one of the key references has been studies on welfare states and housing regimes. Given that a housing regime is characterized by the 'set of fundamental principles according to which housing provision is operating' (Ruonavaara, 2020, p. 10), research on housing regimes might be a useful reference for drawing guiding principles.

From this perspective, a crucial task for directing housing policy seems to be determining the type of housing regime a society should aim to establish. The question about institutions may be 'the true subject of social justice' (Moroni, 2020, p. 255), and it has been at the centre of justice theories in political philosophy. The ultimate goal of those theories is often proposing what kinds of institutions should be established for realizing social justice, or in other words, proposing the 'way in which the main political and social institutions of society fit together into one system of social cooperation, and the way they assign basic rights and duties' (Rawls, 2001, p. 10). Some influential proposals are undeniably Rawls' liberal (democratic) socialist regime and Nozick's minimal state.

A problem with the capability approach is that it neither defines nor advocates any particular forms of institutions, and thus does not offer a concrete picture of institutions we should aim to establish. Research could examine other theories to determine the type of institution that best fits with capability ideas. However, a fundamental question has to be addressed first: would the theories about ideal institutions indeed provide useful guides for housing policy? An underlying assumption of those ideas is that, once established as an ideal institution, could the aligned policies effectively realize justice (Sen, 2012). Although this may be true, some empirical observations in housing research raise considerable doubts about its validity.

Over the past 30 years, comparative housing studies have extensively researched the types of welfare states and housing regimes. Some notable observations are that there are disjunctions between welfare regimes and actual housing policies

operating under those regimes (Hoekstra, 2010). It also appears that institutional arrangements for housing need not have the same characteristics to achieve the same housing policy goal, as observed in the studies on five Nordic countries (Bengtsson & Ruonavaara, 2010; Ruonavaara, 2012). Those countries, all known as social-democratic welfare states, have the same policy goal of providing decent housing to households with fewer means, but their institutional arrangements for housing fundamentally differ from each other, and the division of housing regimes in each country—whether it is universal or selective—has not always been a fixed entity over time. Furthermore, even though countries are dealing with the same housing problems under the same structural force for convergence, such as globalization of finance, it seems unlikely that they will solve the problem in the same way, and thus their housing systems converge (Stephens, 2020). Notably, the formation of housing regimes is heavily influenced by the capacity of established institutions, crucial events, and power mechanisms (Bengtsson & Ruonavaara, 2010), all of which are extremely diverse by country and city over time in the real world. Actual institutional forms and their actual operations are highly contingent on the historical, societal and cultural context.

Another key observation is that the answer as to which housing regime is ideal may vary by the structural conditions surrounding housing at that particular time. A good example to illustrate such dynamics is the classic discussion around the homeownership-oriented regime. The discussion has emphasized the social role of homeownership, such as providing ontological security (Dupuis & Thorns, 1998; Saunders, 1990), and enabling individuals to expand other financial, social, and human assets (Moser, 2006). In this line of thinking, the homeownership-oriented regime would be the most desirable model for securing housing rights and also for reducing inequality by spreading ownership among all income classes. In some structural conditions, it could be an ideal regime for achieving a social goal of housing policy (e.g. socialized homeownership regime in Ireland until the 1990s [Norris, 2016]; Norway until the mid-1980s [Gulbrandsen, 2004]).

However, when surrounding structural conditions change, it raises some serious doubts about its validity. There are now much fewer middle-income groups, more non-standard employment, and more restricted entries for youth into labour markets, hence a much smaller size of the population with access to housing finance for homeownership. With changes in population structures and labour markets, the homeownership-oriented regime could even accelerate the increase in housing inequality. At the same time, under the financialization of housing, the social role of homeownership has faded away; housing has become an investment tool rather than one for securing a home. The legitimacy of the arguments for the homeownership regime is now critically questioned (e.g. Madden & Marcuse, 2016; Ronald, 2008). In reality, the structural conditions surrounding housing are highly dynamic. If the government makes a commitment to establish a particular housing regime, it could hinder the government from timely responding to changes in the surrounding conditions. Risk of such commitment is indeed that ‘there is nothing in the procedure to make interactive corrections [when it goes wrong]’ (Sen, 2012, p. 103).

Apart from these practical challenges, there are also moral challenges when relying on the theories of ideal institutions. The underlying perception of those

theories is that social justice operates at state level. It implies that policy interventions are legitimate only for the contracted members within respective state boundaries (Sen, 2012). Policy debates become restricted from involving ‘voices beyond the membership of the contractarian group’, and are thereby neither able to include the interests of non-contracted members nor to avoid entrapment in local parochialism (Sen, 2009, p. 70). There exist morally relevant housing issues that are not confined to state boundaries, such as housing rights of non-state members (e.g. refugees, asylum seekers, and seasonal workers crossing borders), and unjust performance of global firms in the housing sector. When housing debates rely on the theories about institutions, there is no space to justify policy interventions in those housing issues.

Let us now turn back to the starting question about whether devising principles of housing justice with the ideas on institutions would provide useful guides for housing policy. As examined above, observations on welfare-housing regimes and housing systems rather indicate the complexity of realizing an ideal institutional model in practice; regardless of which idea of institutions is taken from theories of justice, it is likely to remain purely hypothetical. In addition, when relying on their reasoning for justifications for housing interventions, policy discussions can be constrained from addressing the morally relevant issues that are not bound to the state. A subsequent question is: how should we then manage these problems when devising principles of housing justice for guiding policies?

Instead of the conventional approach that asks what a perfectly just society should look like, thus asking for establishing ideal institutions (labelled as the *arrangement-focused view of justice* or *transcendental institutionalism* in Sen (2012)), discussions on housing justice can consider an approach primarily asking for correcting the unjust cases observed and for choosing the best alternative solutions for resolving the cases (labelled as the *realization-focused view of justice* in Sen (2012)). When shifting the debate focus from housing regimes to actual cases of unjust housing situations, the debate has to examine causes and corrective measures under the concrete circumstances surrounding the cases. This forces policy discussion to fully recognize the plurality of institutions; policy alternatives have to be built on the full recognition of what the current institutional arrangements for housing look like, how they actually operate, and what their actual consequences are, instead of striving to resolve the disjunctions between welfare-housing regimes and housing policies. Furthermore, this approach can provide a space for policy discussion to interact with the dynamics of structural changes surrounding housing. Another compelling merit of the realization-focused approach is that policy interventions for non-state members can be justified (Sen, 2009) and roles of various entities other than states can be recognized when promoting justice in housing. It opens up space for discussing global housing justice and international interventions by various actors.

When debating housing policy directions, there has been a tendency to tacitly accept that types of state institutions are key references for guiding policies. In housing research, the comparative studies on housing regimes have provided useful insights into possible options of a policy direction, but the studies have also tended to restrict a boundary of the possible options. In particular, the discussion regarding problems of neoliberal housing regimes and welfare state retrenchment has

unintentionally narrowed the choice to either favouring markets or favouring the corrections of market failures, whereas the market is not a proper normative benchmark for guiding policy debates (Bengtsson, 1995).

All the observations discussed in this section indicate that the prime reference for directing housing policy orientation should not be the types of ideal institutions to establish, but the progress of corrections to unjust housing situations. Consequently, evaluation practices become the most crucial, and this leads to the next subject: metrics of justice.

(b) Metrics of justice: which housing inequality should we evaluate?

Competing theories suggest different metrics of justice that define what to distribute for reducing inequality and which informational base to use for evaluating inequality. Some well-known metrics are primary goods in Rawls's theory, resources in Dworkin's theory (e.g. housing wealth, income for housing, and dwelling units), libertarian rights in Nozick's theory (e.g. housing property rights), utility in the traditional welfarism approach (e.g. housing satisfaction and desire/preference fulfilment), and capabilities in Sen's and Nussbaum's approach.

For an evaluation of wellbeing and inequality in housing, monetary, material (resource) and satisfaction-based (utility) metrics have dominantly been used. From the capability perspective, however, these metrics have limitations in capturing the actual states of housing affairs, as well as in addressing ethical issues such as a violation of the right to adequate housing. To compensate for the problems, alternatively, the metric of housing capability can be considered (Kimhur, 2020; Foye, 2021).

Using the housing capability metric is theoretically well justifiable on the grounds of all the reasoning of the capability approach. A lingering issue is how to evaluate it. Evaluating capability for housing means estimating the potential of individuals to achieve their valued ways to reside. Conceptually, it is ideal to measure such potential, but in practice, this is extremely challenging as the potential is not directly observable. Evaluation approaches might need to compromise between the ideal concept and measurable concepts, that can be somewhat different from very foundational ideas of the capability concept. By scrutinizing how the capability concept pertains to housing issues and social justice, this section examines a compromising approach to evaluate capability for housing while retaining its underpinning philosophical thoughts of justice.

How housing capability pertains to justice and real-life housing issues

The capability concept is in fact not consistently applied throughout the literature. Nevertheless, its application tends to fall into one of the two approaches as follows, depending on which tenet of the capability ideas is emphasized for the evaluation of the state of affairs. One approach focuses on understanding (i) actual 'beings and doings' (functionings) what people value, and another focuses more on understanding the (ii) extent of real opportunities to be and do what people (have reason to) value.

Among the points of capability arguments, the former emphasizes reflecting on heterogeneous values of individuals and conversion factors between means (e.g. possessed resources) and ends (i.e. actual beings and doings). The latter, however, emphasizes the extent of substantive freedoms of people. In the former case, the capability concept is generally used as an *alternative combination of functionings* that a person can choose from according to their reasoned value (e.g. Nussbaum, 2011; Sen, 1985, 1999), mainly when discussing human development, poverty, and quality of life. In the latter case, capability is discussed as the *real opportunity to achieve the functionings a person values*. Discussions of inequity and justice are often based on this concept (e.g. Sen, 2009; Wolff & De-Shalit, 2007). These two different focuses have then led to different approaches to justice, as found in Nussbaum (1992, 2011) and Sen (2009); while Nussbaum argues for ensuring all persons sufficiently achieve basic human functionings,¹ Sen emphasizes the removal of sources that constrain real opportunities.

When we bring these concepts into housing, *housing functionings* would be conceptualized as acts or states of residing and dwelling, while *housing capability* would be conceptualized either as a set of available valued housing functionings (in line with (i)), or the possession of real opportunities to reside in ways a person has reason to value (in line with (ii)). Accordingly, there are two ways to use the housing capability metric to assess inequality in housing: (i) defining a set of valued states of residing (i.e. valued housing functionings) and assessing their deprivations, or (ii) assessing the extent of real opportunities to achieve valued housing functionings and its interpersonal difference. To illustrate the difference between the two approaches for the same issue of the right to adequate housing, the former approach would assess deprivations in basic housing functionings that constitute states of living in adequate housing, while the latter would assess the extent of real opportunities to live in adequate housing and any unjust situations that constrain this potential.

In housing discussions, the use of the capability ideas has mostly followed the first approach. Here, the notion ‘what people (have reason to) value’ in the capability concept is interpreted as varied attributes of residential preferences or residency-relevant values (e.g. Batterham, 2019; Coates *et al.*, 2013). While this approach can force housing policy to acknowledge the heterogeneous values of people regarding their housing, it has also created bottlenecks in the use of the capability ideas.

In reality, there is a great diversity of housing functionings that individuals value. There is a wide range of variables that characterizes a situation of residing (e.g. house attributes, location/neighbourhood, length of locational residency, and tenure type). Each variable has multiple options to choose from, and a choice of the valued option then again varies greatly from person to person according to their personal goals, living conditions, and local notions. Furthermore, even for the same person, the most valued option can change over time as their housing strategies may be adjusted throughout their life course. Such extensive diversity of valued housing functionings makes it nearly impossible for research to compile their complete list for a scaled policy usage. Otherwise, the list has to be simplified to a certain extent, and this poses the risk of majority rule, that is contrary to the capability argument for recognizing heterogeneous values of individuals.

In fact, this bottleneck created by the first approach not only increases the uncertainty about the practicality of the capability metric, but also limits the housing justice agenda. Instead of exhaustive list of heterogeneous values, the capability discussion has focused on the *basic* functionings necessary for realizing human rights, as a second-best solution. Applying the same solution, we can first identify basic housing functionings minimally required to secure the right to adequate housing. However, the housing issues demanding justice considerations are not limited to their deprivations. A person could live in adequate housing but still face unjust housing situations because of unequal power between the landlord and tenants (e.g. Chisholm *et al.*, 2018). The housing issues subject to justice considerations certainly include the situations caused by oppression, discrimination, structural exclusion and unequal power relations. Such unjust situations drive some groups to make coerced choices for their housing, and this means their real housing opportunities (or, housing capability) are more constrained than others. A sole focus on deprivations in valued housing functionings can overlook these unjust situations, that might actually be the key source of the deprivations.

For addressing justice agendas adding to deprivations in basic housing functionings, housing capability needs to be conceptualized with an emphasis on the principles of substantive freedoms. For this, the interpretation of the *diversity in what people (have reason to) value* has to be revisited. So far, this notion has been associated with varied preferences on attributes of housing or normative values of housing, but it is rather closely associated with the diversity in reasonable housing paths and housing strategies throughout the life course. As Clapham (2005) described in his housing pathways approach, valued housing options vary according to personal goals, lifestyles and living conditions (e.g. family situations, employment conditions, income levels and age), all of which are variable over time. In the housing process, some individuals are forced to make undesirable choices regarding housing, whereas others are able to pursue their valued housing path without significant constraints. The interpersonal difference in such substantive freedoms would indicate inequalities in housing and the existence of unjust situations.

In summary, housing capability is conceptualized as the real opportunity (or potential) to reside in ways a person has reason to value, when placing justice considerations at the centre rather than wellbeing and poverty considerations. The concern about heterogeneous values of people relates to a wide variety of reasonable housing options according to personal housing strategies throughout their life course. In such a housing process, some people may have more constraints than others, and the policy task would be to remove such avoidable interpersonal differences, that is surely different from fulfilling what people value in terms of subjective preferences in housing attributes.

Workable approach to evaluating capability for housing

In shifting the focus from valued housing functionings to real opportunities for housing, evaluation practices now need to capture the potential of individuals to realize their valued housing options. Although the potential aspect is difficult to measure, its extent could be estimated by measuring the conditions that shape the

extent, similarly to the measurement of the volume of a room by the lengths of its structural elements. Thus, we can consider evaluating capability for housing by measuring dis/advantages in conditions that expand or confine a person's potential to execute the housing process necessary for realizing their valued housing options.

Higher degrees of disadvantages in such conditions imply more constraints, reducing the extent of housing capability, in which case a person is more likely to be forced to choose a housing path they do not value (thus indicating a lower level of freedom). Examining such conditions would highlight what situations cause some people to make coerced choices (thus addressing the sources of capability deprivation). Here, the question about which valued housing functioning to achieve is left to individual choices (thus fully recognizing plural personal values and choices). In this way, housing capability can be evaluated with observable information of the conditions shaping the extent of potentials, while retaining the core tenets of the capability ideas of justice (i.e. those described in parentheses).

A subsequent question is now: which conditions should be evaluated? The following discussion further scrutinizes what 'capability as *real opportunities*' would mean in the housing context. Through this, it proposes three conceptual dimensions of the conditions, namely housing opportunities, housing securities, and housing abilities. For each dimension, along with the reasoning behind it, I also discuss how it must be conceptualized to sufficiently reflect the capability ideas of justice.

Dimension 1: housing opportunities

A very basis for having *housing capability*, or *real housing opportunities*, would obviously be eligibilities and entitlements that lead to valued housing options, such as opportunities to access to housing information, financial facilities, affordable housing or participation in the decision-making process. In policy discussion, this basic condition is commonly discussed in terms of eligibility criteria for means and social services for housing. However, this concern has to be expanded when discussing housing opportunities as a dimension of the conditions shaping capability for housing. It must involve concerns about unjust structures of eligibility in society that constrain feasible choices of people during the housing process, instead of a mere focus on formal entitlements for particular social services and means for housing.

To illustrate how this dimension needs to be conceptualized, by using the text of Murie (1974, as cited in Duncan, 1976, p. 119) below, I connect the relevant ideas of the capability approach to the housing vocabulary. Although the text was written several decades ago, it effectively illustrates important subjects to address when examining housing opportunities. The respective capability ideas were noted in italics in brackets below:

Housing processes are best considered within an interrelated set of institutional arrangements [*social arrangements*]. These determine what income groups [*which individuals*] can gain access to [*opportunities to*], whether households can adjust to family growth or threshold of stress [*substantive freedoms to reside in reasonable and valued ways*], how far and in what ways filtering occurs [*inequity in housing*

opportunities], the nature of competition for space, and the nature of choice between alternatives [*factors constraining or expanding choices*]. The structure of institutions does not inevitably remove alternatives [*alternative housing functionings/options in society*], although certain groups are clearly excluded or trapped in specific parts of the system [*inequity in the extent of feasible housing functionings/options*]. The degree to which alternatives remain, and the nature of constraints and choice, within and between parts of the system are determined by the eligibility structure which is derived from the collective decisions of the agencies involved [*public reasoning*].

Information on housing opportunities would reveal mechanisms that cause some population groups to be trapped in unequal housing situations. In the housing and urban fields, there is a long history of research on the relation between housing inequality and demographic characteristics, often under the theme of social exclusion and spatial segregation. Nevertheless, it has been limited in diagnosing inequity in housing opportunities. When this research theme started gaining popularity, especially following the seminal work of Rex and Moore (1967) on ethnicity and housing, Duncan (1976) critically pointed out that most studies solely analysed spatial status and patterns of disadvantaged housing positions, instead of what caused some groups to be in such disadvantaged positions in the first place. Similarly, over 40 years later, Moroni (2020) points out the same problem; researchers examine segregation and unjust situations under the theme of spatial justice, but their analyses and discussions are ‘a sort of “shorthand expression” [...] to denote desirable or undesirable spatial situations and arrangement’ (Moroni, 2020, p. 5).

When evaluating housing opportunities as a basic dimension of conditions to shape housing capability, an appropriate question to start with would be ‘what and who determines access to housing resources and facilities, how this is managed, justified and rationalized, and how opportunities and constraints are changing and may be modified’ (Duncan, 1976, pp. 10–11). Thus informed, evaluation of this dimension can provide information about the source of inequality in housing, thereby avoiding stasis at the ‘shorthand expression’.

Dimension 2: housing securities

Having entitlements and eligibility, however, does not necessarily mean the person has *real* housing opportunities. A person may involuntarily choose to forgo eligible housing opportunities when they foresee potential risks in their residency or other important functionings. To give an illustration, tenants may not raise their voice against unfair demands from landlords if it would place their residency at risk, even if they were entitled to a right for security of tenure. A partner or roomer may not dare to request joint tenancy out of fear of losing what they have now. Some individuals may choose not to utilize opportunities for public housing if they feel at risk of losing dignity due to the stigma of public housing, or if they do not foresee feasible solutions to secure housing after the contract term expires.

Some groups of people may be more likely to forgo eligible opportunities as they face more risks to residency than others. In particular, the high unpredictability in

the livelihood conditions of deprived people forces them to focus on sheer survival and risk reduction by limiting what they can do or be (Chambers, 1989). The security dimension is indeed essential for having genuine opportunities (Wolff & De-Shalit, 2007), and for enhancing the role of housing in providing personal safety and ontological security (Madden & Marcuse, 2016).

As discussed above, *real* housing opportunities are not solely reflected by entitlements and eligibility, as their utilization can be hindered by insecurity in residency. To have *real* housing opportunities, a person should be able to freely choose available opportunities without risking their current residency or other functionings. To ensure such agency freedom, there must be surrounding conditions that ensure housing securities.

The evaluation of housing securities as a base of agency freedom would involve questions about the following three aspects, adding to the general concerns in the policy literature about legal arrangements for the security of tenure and the prevention of forced evictions. First, what kinds of risks to residency security may hinder a person from utilizing the available housing opportunities? Secondly, what situations would force a person to make other valued functionings insecure in order to secure current housing functionings (or vice versa) while others do not have to consider such trade-offs? Lastly, to what extent is a person's residency resilient—to what extent can a person uphold their current residency or recover adequate residency after adverse effects on their livelihood? Deprived groups appear more vulnerable to external shocks, and require greater efforts and means to recover their livelihoods after the shocks (Chambers, 1989). The difference in residency resilience would indicate that some individuals face greater barriers than others when attempting to utilize feasible life options and housing opportunities.

Thus, when evaluating the housing security dimension for a policy implication, it needs to investigate the factors that impose risks on residency security, who has fewer means and abilities to cope with the risks, and who needs more means for recovery after falling under the threshold of living in adequate housing.

Dimension 3: housing abilities

Adding to housing opportunities and securities, equally important conditions are those that can enable people to proactively improve their housing situations, thus promoting the maximum expansion of agency freedom in the housing process. As discussed by Drydyk (2008) as well as Ibrahim and Alkire (2007), fostering the expansion of agency entails empowering and enabling people to 'shape their own lives for the better' (Drydyk, 2012, p. 32). The conditions for raising agency freedom in the housing process can be conceptualized as housing abilities.

To evaluate housing abilities, at least two aspects should be examined. One aspect is the ability to effectively utilize eligible housing opportunities. Such abilities would include housing literacy, financial literacy, and abilities to access housing benefits and social/public housing (e.g. Eurofound, [2015], showing limited access to appropriate information causes the non-take-up of social benefits).² It would also concern the ability to effectively participate in the decision-making process; in reality, being entitled to participate does not necessarily mean that they can effectively influence the decision, as this requires certain knowledge and skills.

Another key aspect is the ability to proactively improve one's own housing situation. It is clearly distinguished from the ability to utilize the opportunities provided by others. To control housing situations and take actions, people need, for instance, the ability to develop suitable housing strategies throughout the life course. It would also be crucial to develop housing literacy, that is, the ability to understand various housing subjects pertaining to rights, policies, contract terms, housing markets and financial programs and, more importantly, how variations of these subjects affect one's housing strategies and rights.

These proactive housing abilities would also include the ability to create (or demand) housing opportunities and rights that are not yet societally established but necessary, for example, the ability to mobilize collective actions for addressing an unjust housing situation. This particular ability, however, may have to be understood in relation to collective capabilities (Frediani, 2009; Ibrahim, 2006) and institutional capabilities; the aggregation of individual housing abilities may not be equal to the capability of a group/society to manage unjust housing situations.

In summary, an approach to evaluating a person's capability for housing is to assess the degree of dis/advantages in conditions that shape the extent of housing capability. For this, at least three dimensions of shaping conditions must be examined: housing opportunities, securities, and abilities, to reflect the concerns about substantive freedoms of the capability ideas about justice. While housing opportunities provide a basic entry condition for expanding capability for housing, housing securities form a low threshold of agency freedom to utilize provided housing opportunities, and housing abilities raise the agency freedom for the better. Inequality in those conditions implies that some groups have to cope with more constraints in their housing process, hence having to cope with unjust housing situations. Table 1 summarizes these three dimensions with some examples of relevant housing subjects.

(c) Distributive pattern rules: what level of distribution should we aim for?

The section now turns to the last subject: distributive pattern rules. When implementing justice ideas, defining a distribution threshold could be crucial as it would be a key yardstick to reflect the overall success of policy performance. In principle, the capability approach has an egalitarian perspective; it perceives that everybody equally deserves to have substantive freedom to choose their valued life options. When applying this idea for guiding housing policy, however, questions about distribution arise naturally. Should society take responsibility for expanding the housing capability of everybody, the badly off, or solely the worst off? If society should guarantee basic housing functionings for all, such as living in adequate housing, which level of adequacy should be defined as the threshold?

For progressing our discussion about guiding principles for housing policy, the last key task now seems to be scrutinizing theories on ideal distributive pattern rules (e.g. egalitarianism, sufficientarianism, and prioritarianism), and defining the level of distribution of housing capability that policy should aim for. However, as with the two subjects of justice discussed above, some gaps can exist between ideal

Table 1. Proposed dimensions of the conditions shaping the extent of housing capability.

Dimensions	Concepts	Examples of subjects to evaluate
Housing opportunities	<p>A person's basic position to have housing capability</p> <ul style="list-style-type: none"> • Having access • Being entitled • Being included in (formal/informal) eligibility structure 	<p>Mechanisms under which some groups are excluded from eligibility for/entitlement to access:</p> <ul style="list-style-type: none"> - adequate information about housing programs - adequate/affordable housing - housing financial facilities - participation in decision making, etc.
Housing securities	<p>A low threshold of agency freedom</p> <ul style="list-style-type: none"> • Protecting achieved states of residing (housing functionings) • Preventing forced trade-offs between securing residency and other functionings • Having residency resilience 	<p>Differences in the degree of:</p> <ul style="list-style-type: none"> - vulnerability to the risks that make residency insecure - necessity of trade-offs between securing current/minimal housing functionings and other life options/functionings - means or abilities to cope with the risks (or recover from adverse impacts) - security of tenure
Housing abilities	<p>A raiser of agency freedom</p> <ul style="list-style-type: none"> • Maximally fostering the expansion of agency and substantive freedoms • Enabling/empowering people to shape their own lives for the better 	<p>Abilities to effectively utilise the housing opportunities provided:</p> <ul style="list-style-type: none"> - knowledge/understanding of housing services; for example, housing benefits, social housing (a part of housing literacy) - financial literacy; financial ability - knowledge/skills related to participation <p>Abilities to proactively build housing situations for the better:</p> <ul style="list-style-type: none"> - Ability to plan housing strategies - housing literacy - ability to participate in/mobilise collective actions for resolving housing issues - ability to claim rights and demand opportunities

Source: author.

rules for distribution and those that are feasible to apply for policy practices. In addition, debates on distribution thresholds are apparently not pertinent to all kinds of justice issues, such as power and recognition that are not tangible objects to distribute per se, whereas, for some metrics of justice, like resources, it is indeed crucial to define a threshold (e.g. social housing units and housing allowance). This section scrutinizes to what extent a choice of distributive rules would provide practical guides for housing policy, and discusses how the question about ideal distributive patterns needs to be managed when applying the capability approach.

Different types of distributive consideration

In section (b), two approaches to using the housing capability metric were discussed: evaluating valued housing functioning, and evaluating the extent of real housing opportunities. So far, most studies have been in the first approach with particular attention to addressing the right to adequate housing, because it is considered as the most basic housing functioning that people would and should value (e.g. Fitzpatrick *et al.*, 2014; King, 2003; Nicholls, 2010). In the same line of reasoning, multidimensional poverty measurements in the capability perspective have often selected housing adequacy as the indicator of basic housing functioning (e.g. Alkire *et al.*, 2020; Burchardt & Vizard, 2011). In this approach, discussion about distributive patterns becomes essential because it has to define a threshold

of adequacy for setting policy goals and target groups. Some scholars have proposed prioritizing the least advantaged groups (e.g. Taylor, 2019; Wolff & De-Shalit, 2007), but most hold a sufficientarian view that public actions should guarantee a sufficient level of universal basic housing functionings to ensure the right to adequate housing for all.

It may be seen that the distributive pattern of sufficiency is most suitable when devising principles of housing justice with the housing capability metric. However, there is an important point to consider, regardless of which distributive pattern is selected. Human rights are the most urgent issues of basic global justice, and not all justice issues are a matter of human rights (Gilbert, 2009, p. 676). When applying the capability approach to housing issues, Nussbaum's list of central human capabilities has frequently been referred to, but her underlying idea is actually to address the most urgent demands through a human rights approach before advancing toward a more ambitious standard of justice. Hence, she noted that her theory is only a 'partial and minimal account of social justice' (Nussbaum, 2006, p. 71). Extensive discussion about basic housing functionings and their distribution pattern can unintentionally narrow the agenda of housing justice to the distribution of minimal housing conditions necessary for survival and poverty avoidance.

The issues pertaining to housing justice are not limited to the matter of housing rights and basic housing functionings. Different levels of power, respect and recognition (Fraser, 2003; Young, 1990) cause housing discrimination against some groups (e.g. Heylen & Van den Broeck, 2016). There are also issues of social equality that concerns 'the right types of classless relationships between people, avoiding oppression, exploitation, domination, servility, snobbery, and other hierarchical evils' (Wolff & De-Shalit, 2007, p. 5). All of them can cause some people to make coerced housing choices, hence injustice in housing.

As discussed in the previous section, when policy aims to expand real housing opportunities, measures have to address various intangible constraints affecting one's housing process, such as housing discriminations by landlords or insecurities that hinder one from requesting a joint tenancy. These issues are, apparently, not tangible objects to distribute per se, but still demand distributive considerations; some groups experience disadvantages more than others because of inequalities that arise from circumstances beyond their control (e.g. gender, age, ethnicity, disability, and citizenship status), but such inequalities could be balanced by policy interventions. For those intangible disadvantages, policy needs to involve other kinds of distributive consideration, different from setting a threshold for distribution of tangible goods.

The types of distributive rules could be broadly categorized as follows, according to Anderson (2010): (i) unconstrained procedural rules (e.g. rejection of any distributive interventions in Nozick's theory), (ii) distributive pattern rules that 'fix distributions of actual goods independently of what anyone does' (e.g. distribution of primary goods to the least advantaged in Rawls' theory; distribution of essential human functionings in Nussbaum's approach) and (iii) constrained procedural rules that 'only fix *opportunities* for access to goods' (e.g. correction of rules to remove obstacles to choosing valued life options in Sen's ideas)—here, actual distribution of functionings is left up to individual choices to take advantage of the opportunities open to them.

Therefore, when discussing policy to guarantee basic housing functionings, we need to select a particular distributive pattern, that is, a threshold of basic housing functionings and target groups. On the contrary, when discussing policy to expand real housing opportunities, we need to define constrained procedural rules that can ensure equity in such opportunities, or how to fix the rules that constrain the expansion of housing capability; such rules should include both formal and informal ones whichever rule actually operate in society.

The very starting point for discussing principles of distribution is, therefore, not the selection of an ideal distributive pattern, but the clarification of which aspect of housing capability the discussion aims to address. Depending on this, the pertinent type of distributive consideration is different, which is not necessarily about a choice of distribution thresholds among everybody, the badly off, and the worst off.

Distributive rules as references for debates, rather than principles of justice

After all, selecting an ideal distributive pattern must not be considered as *the* crucial task for guiding policy. As discussed so far, depending on the nature of issues to address, a major task could be: selecting a particular distributive pattern of housing functionings and basic goods; or fixing the rules that unfairly constrain real housing opportunities and that create inequity in intangible advantages.

Another key point is that, the exclusive focus on distributive patterns can narrow the conception of distributive justice. Traditionally, the major social agenda of housing policy has been the distribution of housing services and housing units. It has naturally led to an excessive focus on distributive patterns when debating justice in housing. This narrow interpretation of distributive justice has been mistakenly treated as equivalent to social justice (Moroni, 2020), and was heavily criticized as a ‘distributive paradigm’ (Young, 1990).

Meantime, the application of the capability approach has forced the conception of distributive justice to widen to a certain extent, by adding concerns about the adequate state of residing pertaining to human rights. However, debates on the distribution of adequate housing still narrow the conception of distributive justice as they limit the scope of housing justice to the distribution of minimal conditions necessary for survival. When the selection of distributive patterns is placed as a core task of housing justice, it entraps the discussion to the conventional narrow conception of distributive justice, that dismisses distributive concerns about other types of advantages that are morally relevant, but not always subject to the selection of a distribution threshold.

Besides, debates on ideal principles of distribution could also remain purely theoretical and thus may not provide practical guides. For some issues, such as adequate housing units and basic economic goods for accessing adequate housing, even if debates on distribution thresholds reach an agreement on an ideal distribution threshold, in reality, the best idea for actual implementation is likely to vary by case. This is because actual decisions on thresholds have to consider the nature of unjust cases to deal with, and their surrounding conditions, such as the current institutional capacity, public perceptions, politics, available budgets, and the urgency of surging issues.

In essence, when guiding corrections to unjust housing situations, discussions around distributive (pattern) rules should be perceived as useful references for examining potential options to employ and their possible limitations in the context of the unjust cases to resolve, rather than as a subject to determine the best idea to apply universally. The key task must be scrutinizing which distributive rule would be contextually more justifiable than another.

Conclusions and discussion: role of comparative housing research

This article examined some intermediate issues between the philosophical ideas of the capability approach and housing policy practices. It looked at the three essential subjects of justice theories, namely ideal institutions, metrics of justice, and distributive pattern rules. From this, an approach to housing justice for guiding policies is drawn as follows. Instead of absolute principles of distribution, or characteristics of a welfare state/housing regime, policy should be guided primarily by the changes in unjust housing situations in terms of people's capability for housing. Discussion about types of institutions and distributive pattern rules is still important, but the point of discussion should be about which option is contextually more justifiable and feasible, rather than which one the society has to ultimately pursue.

In this approach, it is a crucial task to detect unjust housing situations by evaluating housing capability, and monitoring progress therein. For the evaluation practice, as a proxy of housing capability, we can consider assessing the dis/advantages in conditions that shape the extent of capability for housing, that is, constraints in a person's housing process that cause coerced choices of housing options and housing paths. Three conceptual dimensions of the shaping conditions must be evaluated for reflecting the capability ideas about freedoms and justice: they are, housing opportunities, housing securities, and housing abilities.

There is, however, a remaining issue to resolve. The approach proposed here does not refer to any absolute principles—neither a particular form of housing regime, nor distributive threshold. Consequently, it raises a critical question: based on which yardstick can we assess how well a society is functioning? This approach requires alternative kinds of moral references to evaluate social performance. The solution could be quite straightforward. In this approach, the core task is to continuously scrutinize unjust housing situations and monitor their progress. Apparently, the essential moral reference would be comparisons of changes in society.

The primary task of the comparisons would be observing changes in housing capability regarding the observed unjust situations, and thereby indicating how far societies—communities, cities, or countries—are advancing housing justice. However, this is still not enough to compensate for the absence of any absolute principles of justice. Two additional tasks can be identified as follows.

The first is to compare social alternatives to resolve the observed unjust housing situations. It involves questions about which alternative would better expand housing capability than another, of which discussion would provide the basis for a social choice between the alternatives. The second is to compare how

different societies view the same cases of injustice in housing. When judging whether a case is unjust and whether a policy measure is rightful, if the discussion is left solely to a confined boundary of society, an appropriate judgement can be ruled out by the majority groups. In addition, it can be affected by entrenched customs or vested interests in society (Sen, 2009). To avoid these problems, transcendental principles of justice have been sought. However, as discussed in this article, those principles run the risk of remaining purely hypothetical. An alternative solution could be promoting 'trans-positional objectivity' (Sen, 1993). For determining which housing situation should be considered unequal and thus requiring policy interventions, especially for the issues of marginalized groups, comparing views from different societies on the same housing issue could play a significant role.

All these tasks highlight that comparative housing research has a crucial role in providing normative references for housing policy debates. Comparative research has featured prominently in housing literature, especially in Europe since the 1960s. It could be a good basis for developing alternative normative references. For this, however, research has to expand its scope substantially. Previous focus has mostly been on comparing housing systems and regimes, and the comparisons tend to remain descriptive without explicit normative implications (Oxley, 1991, 2001). To serve as a tool for guiding housing debates on policy for reducing inequality in housing, comparative housing research must expand its agenda by including the monitoring of progress in corrections to unjust housing situations, comparing alternative solutions for the corrections, and comparing views from other societies on the same unjust cases. Guided by this, concrete housing policy measures could be suggested, hence advancing housing justice in our societies now.

Notes

1. To promote clearer discussion in this article, I have used 'basic human functionings' instead of 'central human capabilities [to function]'. In the quality of life/poverty discussion, central human capabilities are considered as the precondition of substantive freedom to achieve a decent life; for example, people can have basic freedoms to choose desired jobs only if they have the basic functioning of bodily health. In this usage, the concept of human capabilities is similar to basic human functionings.
2. Causes of non-take-ups of housing benefits/allowance include misperceptions about the benefits and lack of the following: information about entitlement/application procedures, awareness, resources (e.g. time for application), and ability to navigate the system or travel to the welfare office. Approach to housing justice from a capability perspective: Bridging the gap between ideals and policy practices.

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