Chapter 5: Discussion and Conclusion

Questions of distributive justice arise in many small ways in our everyday lives, such as when we are deciding whether to pay extra for a product bearing a fair-trade label, or in bigger ways, such as when we are voting on a policy that is going to affect many people's lives through its redistributive effects. Whether we are in the position to distribute goods according to what we consider fair or whether we find ourselves at the receiving end of an allocation, these decisions, big and small, have an impact on both our individual well-being and on the functioning of groups (Deutsch 1975; Leventhal 1976). Using different allocation norms can either foster cooperation or be the cause of conflict, even leading to wars (Fiske 1993; Deutsch 1973; Deutsch 1985). In face of the rich literature on both normative theories of justice (among others: Rawls 2005; D. Miller 2003; Sen 2009; Dworkin 2002; Scanlon 1998; Nozick 2013; Roemer 1998) as well as empirical work on what people perceive as fair (e.g. Andreoni and Vesterlund 2001; Robinson and W. Bell 1978; Alesina and La Ferrara 2005; Fong 2007), this book set out to make a contribution to the field in several ways.

First, a structured overview of the philosophical underpinnings of the three most important principles of justice: *merit*, *equality* and *need*, was presented. Second, drawing on the multifaceted findings from different fields, an attempt was made to distil some of the mechanisms explaining people's perceptions of justice. Since many different factors on the individual and contextual level, but also the relational structure of the situation in which an issue of justice arises, affect the choice of justice principles, the goal was to try to disentangle these effects. Based on the theoretical arguments and previous findings, hypotheses were formulated for all three aforementioned levels to structure the analyses.

The individual level hypotheses are primarily based on considerations in line with rational self-interest. It was expected that due to differences in beliefs and preferences, women and people from lower classes would endorse the principle of equality more than men and people from higher classes (hypotheses 2 and 1.b). It was also expected that people from higher classes would endorse the merit principle more than people from lower classes (hypotheses 1.a).

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Furthermore, because situational effects are underexplored in research on distributive justice, prioritising this aspect of distributive justice is perhaps one of the main empirical contributions of the present book. In contrast to a typical approach from economics which would treat issues pertaining to the situation as biases in the form of *frames* (e.g. R. H. Thaler 1991; Kahneman and Tversky 2000), in this book, following a more systemic approach, justice was treated as an inherently situation-dependent phenomenon (Fiske 1992; Deutsch 1975; Konow 2001). Because we are a fundamentally social species, our actions are guided by the social relational structures of our interactions and the anticipated consequences of our actions on those relations. Because equal allocations have a positive effect on mutual cooperation and harmony (Deutsch 1975; Lerner 1977), it was expected that in a situation involving a *solidarity-oriented* setting (or in Fiske's 1992 terminology: *equality matching*), such as commonly found among friends, people would distribute goods using primarily the equality principle. In the workplace setting, where the goal of social interaction is usually economically oriented (*market pricing* mode (Fiske 1992)) and because of its productivity enhancing properties, merit was expected to be the dominant allocation norm (Deutsch 1975; Thibaut and Kelley 1959; Leventhal 1976). In the family setting on the other hand, need was expected to be the predominant allocation norm, because this is one of the rare situations in Western culture where the *communal sharing* relational mode (Fiske 1992) prevails, where people are *caring-oriented* (Deutsch 1975). Furthermore, in the public goods situation in which respondents were asked to distribute scholarship money, it was expected that people would use a combination of both the need and merit principles so as to attain an efficient use of public goods, while at the same time ensuring a certain degree of equality of opportunity.

Additionally, it was expected that context shapes people's beliefs and preferences on issues of distributive justice. To test this, surveys were also administered to two student samples at Princeton University in the United States and the University of Bern, Switzerland. Differences were expected primarily due to a discrepancy in beliefs about meritocracy, the realisation of equal opportunity, and the causes of inequalities. Because of the widely documented cultural differences in belief systems, inequalities are per se perceived as more legitimate in the US (e.g. Alesina, Stantcheva, and Teso 2018). Accordingly, equality was expected to have a lower priority as a principle of justice in the US context, while merit was expected to be more important.

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Third, as a means of addressing the complexity and many challenges pertaining to (research on) distributive justice, and as a means to test these hypotheses empirically, the distributional survey experiment (DSE) was developed. To introduce the DSE as a new tool for research on distributive justice was thus a further aim of the book. The DSE incorporates useful design features of choice experiments and factorial survey experiments, however, is also inspired by game theoretic approaches in which people make active allocation decisions.

However, the biggest strength of the DSE is that it was designed to capture the nature of the problem of distributive justice by creating a setup in which respondents actively distribute resources among a group of three people, described using experimentally varying combinations of need and merit. First, in order to reach a conclusion on who should receive how much, respondents must compare and evaluate the bundled attributes of the people described in the vignettes. The method thus forces respondents to mentally assess the trade-offs between competing principles of justice (merit, need and equality) and apply some kind of weighting or prioritising. Second, in the (re)distribution of resources, outcomes are inherently interdependent. Giving more to some leaves less over for the others. This property is captured in the design of the distributional survey experiment. A further advantage of the DSE is that the design can easily be adapted to include allocation tasks in different settings, such as in our case: among family members, friends, students applying for scholarships and at the workplace. The DSE is thus designed to allow us to differentiate between different justice principles as well as the three levels (individual, contextual & situational) affecting the choice thereof. Compared to previous possibilities, the DSE thus generates rich data efficiently and parsimoniously.

A. *Discussion of the Main Findings*

I. Gender and Class Effects

Assuming that people are motivated by both self-interest and fairness considerations, it was argued that people apply various strategies in order to reconcile these two, oftentimes conflicting, interests. When wanting to feel and be able to argue that what is in one's own self-interest is also what is fair, we may experience cognitive dissonance. As a mechanism to reduce the negative feelings that are caused by cognitive dissonance, people can

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react by adapting their belief and value systems to bring these two concerns into alignment (Festinger 1957). It was thus expected that people would opt for distributions in line with their self-interest and that people with more privileged backgrounds would distribute more in line with the merit-principle (hypothesis 1.a), while people who are less privileged would choose to divide resources equally more often (hypothesis 1.b). Furthermore, due to previous findings, a gender difference in the propensity for equal divisions was also expected. Due to both gender-specific socialisation, that promotes different qualities depending on gender, as well as enduring labour-market and status inequalities between men and women, we expected to find a higher preference for egalitarianism among women (hypothesis 2).

The findings offer weak support for the hypotheses on class effects. While there was a general tendency for people from lower socio-economic backgrounds to distribute more in line with the principle of equality than people from higher socio-economic backgrounds, the effects hardly ever achieved statistical significance. And the same can be said for the hypothesis claiming that higher class people would support the merit principle more. These findings offer tentative support for the claim made in Henrich et al. (2004), where a series of game experiments in fifteen small-scale societies show that context effects are stronger than individual level effects. Because members of a society are exposed to the same institutions, through socialisation processes, their beliefs and preferences can be assumed to be relatively homogeneous within societies, albeit also structured by individual factors. However, the hypothesised gender difference in the propensity to divide equally was strongly supported. In all cases with significant gender differences, women were more egalitarian.

II. Situations and Relational Structures – Fair is What Works Best for the Relationship

Instead of treating expected situational effects as a nuisance to be dealt with, it was a primary goal of the approach followed here to understand these seeming irregularities as functional from the point of view of relational structures. Depending on the goal of a social interaction and the nature of the underlying relationship, other principles of distributive justice will prove most useful. In economically oriented interactions (MP mode) (Deutsch 1985; Fiske 1993) where raising productivity is a central concern of the people involved, people were expected to primarily distribute according to merit (hypothesis 3.a). By

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contrast, in the solidarity-oriented or EM mode, people's interactions revolve around the building and maintenance of agreeable social connections, such as friendships, as ends in themselves (Deutsch 1985; Fiske 1993). Because treating each other as equals is functional in these settings, we expected people to predominantly distribute resources equally among friends (hypothesis 3.b). People in caring-oriented groups, such as commonly found in families, can be said to interact in communal sharing mode. In these interactions, people strive to foster each other's well-being and personal growth (Fiske 1992; Deutsch 1975). It was thus expected that among family members people would distribute according to need (hypothesis 3.c). Furthermore, in a situation involving the distribution of public goods, more specifically scholarship money, two distinct goals are relevant. Next to efficiency considerations, public spending in education is also a way to equalise educational opportunities. Because the goal of the allocation in this setting is twofold, we expected both merit as well as needs to matter (hypothesis 3.d).

The support for these hypothesised effects of the situation is mixed. In the situation involving friends, merit is more important than would have been expected, and contrary to expectations, equality is not the dominant principle. In fact, people (in the general Swiss population as well as students) distributed equally to a similar degree —falling in the range between 20-30% of the cases—in the situations involving friends and the workplace. With only up to 20%, equal distributions were least likely in the public goods setting. In the family setting on the other hand, instead of the expected dominance of the need principle, with over 60%, a clear majority chose to distribute equally. However, this effect might be explained by the fact that there is a very dominant social norm to distribute inheritance money equally among one's children (e.g., Wilson et al. 2020). In the workplace situation, the findings were most in line with expectations, showing a clear dominance of the merit principle. In the public goods setting, merit and need considerations were both important. In this setting, the context was an important factor affecting people's choice of one principle of justice over the other. While students from Bern prioritise need over merit, respondents from Princeton University display a much more merit-based approach.

On the whole, while not every finding was expected, the different allocation strategies across situations can still very well be interpreted in light of the functional models of Fiske (1992) and Deutsch (1975). Next to differences in the nature and goal of a given social interaction, the four basic relational structures (Fiske 1992), of which we focused on three, can further be characterised by the degree of intimacy and reciprocity involved. While

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authority ranking (AR) and *market sharing* (MP) modes are usually very low on intimacy and also do not require it for an interaction to take place, intimacy is a key component of *equality matching* (EM) and *communal sharing* (CS) relationships. In the equality matching interaction mode a certain degree of intimacy has already been built up and it is precisely the wish to maintain or further deepen this intimacy, that constitutes an integral part of the relationship itself. To achieve this goal, the people involved participate in a cycle of balancing processes, such as through mutual gift-giving. In contrast, a *communal sharing* (CS) relationship is, by definition, one with extremely high levels of intimacy so that there is even, to some degree, a merging of identities. Unlike in EM mode, meticulously keeping track of individual contributions so as to be able to reciprocate is unnecessary for a CS relationship to persist (Fiske 1993). This difference illustrates how one way of relating reciprocity to the relational structure is to look at in which ways it is either relevant or not in contributing to the group-goal[1].

As mentioned, reciprocity is least relevant in situations involving a communal sharing relational mode, which can be understood in terms of *Gemeinschaft* (Tönnies 2012). Here the sense of personal responsibility for one another's well-being will lead to higher levels of cooperation and generosity. In CS mode, gains and losses of one partner are felt as gains and losses of the other. The results of a series of game experiments support this implication, with participants displaying higher levels of generosity and cooperation when they are playing with someone they know or when their contributions will go to a cause they support (e.g. the Red Cross) (Eckel and Grossman 1996; Kollock 1998). Furthermore, when an external authority figure is introduced and the participants of an experiment feel less personal responsibility, they will display less generous behaviours (Charness 2000). In market pricing settings, which are inherently depersonalised and functional (Weber 1978), we feel less personal responsibility and reciprocity is highly regularised in the form of equity. By contrast, the equality matching mechanisms of gift exchange are a perfect example of overt reciprocity among people trying to maintain and foster enjoyable relations (Deutsch 1985; Mauss 1966).

While we expected equal splits in the EM situation and needs-based distributions in CS relationships, the findings that people instead distributed equally in the family situation and more according to a merit-based approach than was expected among friends, can still be explained with this framework.

1 Following Deutsch 1985, with *group-goal*, I mean the goal of the interaction and/or the relationship.

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Equal divisions can be understood as a way of expressing the non-importance of the reciprocity norm. And because the equality norm promotes harmony and maintaining harmony among families will usually be considered an important goal, the predominance of equality among families can still be interpreted in light of the relational-mode framework. The other surprising finding on the importance of merit in the situation involving friends can also be explained in terms of the logic of equality matching mode. Since this relational mode demands a balancing of contributions for the maintenance of the relationship, distributing according to merit can also be interpreted in terms of reciprocity. Equality of contributions to the relationship might then be an overarching aspiration which is achieved through a cycle of tit-for-tat responses. To be able to appropriately reciprocate, keeping track of the respective contributions or merit of friends, and responding accordingly, can thus be understood as a means of achieving equality in the relationship itself as well as equality, in the sense of equal treatment, among multiple EM relationships. This brings us back to Sen's question: "equality of what" (Sen 2009, p. 292) discussed in chapter 2. Additionally, we see that the reciprocity norm can either be necessary in working towards achieving the group-goal or not. In other words, reciprocity can be a more or less efficient strategy in achieving the goal of a given interaction embedded within a relational structure.

In regard to achieving efficiency per se, it is considered one of the characteristics of a market-pricing or economically-oriented situation (Fiske 1992; Deutsch 1975), such as at work. It can thus be appropriate or expected to act according to self-interest, as opposed to altruistically or following a reciprocity norm in such settings. However, in other situations, this kind of behaviour would be inappropriate and bear the danger of harming group members and destroying the relationship between the parties involved. For example, in an equality matching relationship, such as between two friends, where maintenance of enjoyable social relations is the goal, the selfish pursuit of one's own interests is not considered acceptable. Because in EM mode, maintaining the relationship is a primary goal in itself, it can most effectively be achieved through investing in one another through constant overt reciprocal exchange (Mauss 1966; Fiske 1992). Similarly, in a communal sharing relationship, such as between two lovers, someone who is constantly looking to maximise individual gains would run the risk of angering or hurting the other party and thus endangering the relationship. Nurturing the well-being of group members with whom one interacts in communal sharing mode is

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thus effectively achieved by giving according to needs (Fiske 1992; Deutsch 1975).

III. Context Shapes our Opinions on What is Fair

To test for effects of context, two student populations, in the US and Switzerland, were compared. Because there is a strong belief in meritocracy in the United States, we expected Princeton students to show more support for the merit principle than students from the University of Bern (hypothesis 4.a). Additionally, due to a higher acceptance of inequalities in the United States, we expected equality to be less important for Princeton students (hypothesis 4.b). The findings generally offer support for the expected context-dependency (Konow 2001) of issues pertaining to distributive justice. As was expected, compared to students from Switzerland (University of Bern), students from the US (Princeton University) were more motivated by the merit norm, in the public goods setting especially, but also as a general tendency in the other situations. Additionally, students from Switzerland were much more egalitarian across the board. Generally speaking, comparing the results from the student samples with those of the Swiss general population, the patterns of distributions according to different need and merit combinations were very similar. The biggest difference was found in the scholarship situation in which the students were less egalitarian than other people. A reason could be that students are more affected by this particular situation and know more about how scholarships are distributed in reality.

B. Limitations

While the distributional survey experiment has proven very useful in many respects — e.g. simultaneous data collection on different levels, accounts for the inherent interdependency of outcomes — there are some potential problems that must be addressed. Generally speaking, while it was necessary to vary the operationalisations of need and merit across the four DSEs, so that they were suited to the respective situations, this is not ideal from the standpoint of comparability. It would be important for future research in this field to create more uniform designs that still take into account that different things will be considered as indicators of merit or need in different situations.

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Also, as has been pointed out by Leventhal (1976), equal splits are not necessarily evidence of egalitarian concerns. Respondents may have come to the conclusion that an even split was the best way to honour the specific combinations of need and merit present in a group of people. For example, were the respondent to apply a merit-based or needs-based approach, two or more people who are perceived as equally deserving or needy would receive the same amount. We would not be able to distinguish this respondent from a strict resource egalitarian. Consequently, if the reason behind an equal division is not motivated by egalitarian concerns, but is a result of a merit-based or needs-based approach — or indeed a combination of the two — then the approach used here will lead to an overestimation of egalitarianism.

Furthermore, even though the division of inheritance money was an obvious example of an allocation task within a family setting, since there seems to be a strong norm to distribute inheritance money equally among siblings, it would be fruitful to come up with other CS situations in the future. This way, we would be better able to test for more general mechanisms. Varying the settings within situations would generally be a useful way to further differentiate the specific from the more general effects and thus attain a deeper understanding of the underlying mechanisms.

Another issue that could potentially be more serious is that the merit and need effects might also be "forced" by the design, since most of the information provided in the experiments was either information on need or merit. However, the finding that, across contexts, an overwhelming majority chose to distribute equally in the family setting but not in other situations is reassuring: respondents evidently did not feel compelled to consider the information on need and merit when they deemed it irrelevant.

Furthermore, the contexts under study are very similar in many respects: Both Switzerland and the United States are prime examples of Western democratic capitalist countries and the findings are thus prone to ethnocentric bias (Lerner 1975). To test whether the here identified mechanisms underlying perceptions of distributive justice are universal, and to further our understanding of these mechanisms, more cross-cultural studies are needed.

Regarding the DSE, the fact that the patterns of the distributions by various need-merit combinations varied so greatly across situations, but also in some cases across contexts, can in itself be understood as encouraging evidence that the distributional survey experiment managed to capture some relevant differences and "worked". However, we should keep in mind that the vignettes depict artificial hypothetical situations and the responses to survey experiments have no real-world consequences for respondents. Be-

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cause of these properties, validity concerns can arise and we should thus be cautious about generalising the results (Collett and Childs 2011). Research that specifically aims to cross-validate the results from survey experiments with other data sources is thus very valuable and promising (e.g. Hainmueller, Hangartner, and Yamamoto 2015).

C. Concluding Thoughts and Implications

> Justice is more than the sum of its parts. The three principles of justice must be weighted, and context provides the weighting scheme in specific cases (Konow 2003, p. 1190).

While I would substitute *context* with *situation*, on the whole the findings presented here lead to a similar conclusion. We set out to find out *who* thinks *what* about justice in *which* situations. In the end, we have come a little closer to a more comprehensive and less fragmented understanding of these issues by applying a systematic approach and carving out possible testable mechanisms. Using the distributional survey experiment, specifically developed for the purpose, some first attempts have been made to differentiate between the individual and the social, in the form of both context and the situation.

One of the main conclusions of the presented research is that more than the individual factors and the context, the situation is a highly relevant factor influencing people's choice of allocation norms. Instead of looking at the situation as a form of bias and distortion, as has often been the case in the discussion of framing effects, we should recognise that the setting within which a just distribution is to be achieved is an essential factor in the evaluation process. Depending on how people interpret the situation in terms of the relational structure between the individuals involved, they will attach different relative weights to the principles of merit, equality and need. This shows that when we want to find out empirically "what the people think" (D. Miller 1992), it is absolutely necessary to incorporate the situation as an inherently relevant factor and not just treat it as a nuisance. This is not to say that there are not people who consistently give one of the basic allocation norms precedence over the others, such as when someone has deep-rooted egalitarian beliefs and thus leans towards distributing equally out of principle. However, we can expect even the most convinced egalitarian to stray from an equal division if they perceive someone as very needy and they have it in their power to help out. The present research underlines the potential of

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taking on a functionalist perspective in order to gain a mechanism-based understanding of situational effects.

For such a deep-rooted understanding of situational effects, it is thus crucial to decompose the setting and lay bare the issues of group identity, social relational structure and the goals of interaction involved. Depending on the nature of the relational structure and the degree of cooperation or competition involved, different allocation norms will best be suited to reach a respective goal. We should furthermore keep in mind that in (Western) (neo)liberal democracies we are socialised to endorse meritocracy and are wired to see things in competition mode (Tan 2008). We are taught to think that what we have is earned and should be used for our benefit only. We can choose to share resources in order to help someone if we want, of course, but generally speaking there is agreement that no one is entitled to what we have "earned". This makes it hard for us to give away and give up privilege in order to meet other people's needs, even if we have more than we need to satisfy our own needs. If we feel entitled to what we have, we then experience loss aversion (Kahneman and Tversky 1979) against the prospect of giving some of our resources away. And this is where, in face of finite resources and glaring inequalities between the global North and South, it seems we need to find ways of broadening our concept of communal sharing mode. Because "the narrower one's conception of one's community, the narrower will be the scope of situations in which one's actions will be governed by considerations of justice" (Deutsch 1975, p. 142).

It is not possible to be in favor of justice for some people and not be in favor of justice for all people. — Martin Luther King Jr.

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