Clara Sabbagh
Manfred Schmitt *Editors*

Handbook of Social Justice Theory and Research

Springer

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Editors

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This handbook is dedicated to the founders of the International Society for Justice Research:

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Ronald C. Dillehay (USA)

Russell Hardin (USA)

Melvin J. Lerner (Canada)

Gerold Mikula (Austria)

Leo Montada (Germany, founding president)

Tom R. Tyler (USA)

Riël Vermunt (The Netherlands).

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Past, Present, and Future of Social Justice Theory and Research

Clara Sabbagh and Manfred Schmitt

The notion of justice is salient both in social life and in scholarly traditions throughout history. Since its inception in 1989, the International Society for Justice Research (ISJR) has provided a platform for interdisciplinary justice scholars, who are encouraged to present and exchange ideas (you are invited to visit http://www.isjr.org/). This exchange has yielded a fruitful advance of theoretical and empirical justice research.

This handbook attempts to substantiate this academic legacy and the research prospects of the ISJR in the field of justice theory and research. It includes a wide range of topics, such as the theory of the justice motive, mapping of the multifaceted forms of justice (distributive, procedural), and justice in context-bound spheres (e.g., education). In doing so, the handbook is meant both to present a comprehensive "state of the art" in the field of justice research theory and to put forward an agenda for future interdisciplinary and international justice research. It is worth noting that the authors represent ISJR's leading senior and junior scholarship. The compilation of their research within a single

framework exposes readers to high quality academic work that embodies past, current, and future trends of justice research.

1.1 Background

The origins of the old-time notion of justice in Western civilization can be traced to the Judeo-Christian biblical (religious) tradition, which stresses God's bestowment of deserved good or evil in one's lifetime. Given the salience of this notion in social life, it is not surprising that it has been examined throughout scholarly history. Seminal academic works can be found in classical Greek philosophy, including, for instance, Aristotle's (1998) *Nicomachean Ethics* and Plato's (1993) *Republic*. These works became pillars of later social sciences and philosophy, inspiring such scholars as Karl Marx, Thomas Hobbes, and John Stuart Mill to develop notions about the social arrangements which are needed to establish a just society.

The normative-philosophical study of justice continues to flourish in contemporary society. In this regard, we can mention some of the most influential, though contentious scholars, such as Barry (1989), Miller (1976), Rawls (1971) and Walzer (1983), whose works have appeared since the 1970s. Alongside, though not necessarily parallel to it, the empirically oriented study of justice

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began in the late 1950s to flourish across social science disciplines, including psychology, sociology, economics, and the political sciences. Justice research has thus historically developed within a multidisciplinary framework.

It is within this scholarly context that the ISJR was founded in 1989 by Ronald Cohen (USA), Karen Cook (USA), Ronald Dillehay (USA), Russell Hardin (USA), Melvin Lerner (Canada), Gerold Mikula (Austria), Leo Montada (Germany, founding president), Tom Tyler (USA), and Riël Vermunt (The Netherlands). The ideas and studies that these founders and their students have contributed over the decades serve as long-lasting and influential milestones of justice research.

In its long scientific tradition, the ISJR has striven for excellence in justice research and the improvement of our understanding of just social structures. Its core mission is to develop an ever more comprehensive understanding of the dynamics of justice behavior by crossing traditional disciplinary divides and fostering diversity in perspectives and methodological approaches. ISJR justice conferences aim to be truly interdisciplinary. Moreover, the ISJR stresses the need for increased attention to the variety of justice behaviors across societies, so as to help unveil the universal and particular aspects of justice behavior and to redress the structural and cultural biases resulting from research limited to Western university students as participants. Finally, the ISJR has pursued expansion of the range of justice research including, for instance, retributive justice and environmental justice. In order to assure the development of these and other new areas of justice research, the founders of the ISJR have handed over their baton to a new generation of promising young scholars.

1.2   Structure and Content of the Handbook

Given the complexity of social justice issues and the interdisciplinary nature of justice theory and research, we decided to map the contributions to this handbook into five parts, each representing a different area of research. These areas cut across the body of available knowledge in a way that enables us to address justice issues from different scientific disciplines. These disciplines include philosophy, sociology, psychology, and economics (Part I); theoretical models that consider justice as a fundamental human motive (Part II); facets that frame justice as a matter of distributions, procedures, retribution, or restoration (Part III); spheres of justice like politics, welfare, work, education, family, the environment and nonhuman species (Part IV); and views from beyond the domain of justice that examine the interplay between justice and related concepts, such as morality, legitimacy, and culture (Part V).

1.3   Part I: Disciplinary Perspectives in Justice Research

Justice theory and research are guided by varied disciplinary perspectives. The most ancient discipline in this regard is philosophy. In Chap. 2, "The Philosophy of Justice," Lukas Meyer and Pranay Sanklecha provide an overview of justice research in contemporary political philosophy, with an emphasis on John Rawls' leading work. Mainly elaborated in his (1971) seminal book, *A Theory of Justice*, Rawls proposes a normative framework for creating a just structure of society and its major institutions—political, economic, legal, and social. These institutions play a central role in regulating the distribution of goods and social burdens among contemporaries who are members of a particular society and thus in determining their life chances. In their chapter, Meyer and Pranay show the implications of this theory in both analytical philosophy and the discussion of current philosophical issues, such as globalization and intergenerational justice. In the case of globalization, the scope of social justice is extended in space, from contemporaries in a particular society to a global (or international) space. In the case of intergenerational justice, the scope of justice is extended in time, as it poses the question of "whether we should care about the welfare of our successors, and what sacrifices we

ought to be prepared to make now in their interests" (Barry, 1991, p. 234).

Against this background, Chaps. 3–5 present an overview of the empirically oriented justice theories and research that have characterized various social science disciplines—namely, sociology, psychology, and economics. In "Sociology of Justice" (Chap. 3), Stefan Liebig and Carsten Sauer elaborate a theoretical schema for the systematic review of an extensive body of sociological theory and research on distributive justice (for a review of the development of a framework of distributive justice theory, see Chap. 11). While recognizing the importance of normative approaches to the study of social justice, the authors clarify the distinct contributions of the social sciences, particularly sociology, to the empirically oriented study of social justice. Specifically, they stress the important role that justice plays in understanding collective (sociological) phenomena. In this regard, the authors assume that justice can be conceptualized as a social value that is socially determined, i.e., affected by social structures and processes, and that justice itself is a social force affecting a wide range of social institutions (e.g., the economy, the polity) and processes. With these tenets in mind, Liebig and Sauer first elaborate a multilevel model that includes four sociological perspectives on justice research—institutions and discourses on the societal (macro) level, and attitudes and behavior on the individual (micro) level—and then extensively review the key empirically oriented distributive justice research deriving from these approaches. On the basis of this systematic analysis, the authors unveil new areas of research that should be developed.

In Chap. 4, Mario Gollwitzer and Jan-Willem van Prooijen review important theories, methods, and findings contributed by the "Psychology of Justice" to the social justice literature. Whereas sociology captures collective justice phenomena, psychology addresses justice on the level of individuals. Specifically, psychology is interested in which kinds of situations, events and outcomes of decisions are perceived as just or unjust, how individuals react to perceived injustice and how these reactions are shaped by the situation, by

personality traits, and by the interaction between them. In the first part of the chapter, the authors describe the cognitive and emotional processes that occur within individuals when confronted with injustice. They explain how these processes differ between people, depending on personality traits such as social value orientation and the moral self-concept. Subsequently, Gollwitzer and van Prooijen review interpersonal justice dynamics resulting from social interaction and social comparison processes. These comparisons employ normative standards, such as equality as a principle of distributive justice or bias suppression as a principle of procedural justice. The authors argue that any violation of these standards evokes emotions such as anger or outrage and motivates individuals to restore justice by punishing perpetrators, compensating victims and forgiving. The final section of the chapter is devoted to intergroup dynamics, such as in-group favoritism and hostility towards out-groups. Using relative deprivation research as an example, the authors argue that group-based social comparisons can lead to outcomes that are fully independent of individual-level comparisons. In other words, people can feel they are treated fairly as individuals even though they perceive their group as unfairly disadvantaged. This is an important conclusion, suggesting that a comprehensive explanation of justice-related psychological processes requires the inclusion of intraindividual, interindividual, and intergroup dynamics.

Chapter 5, by James Konow and Lars Schwettmann, provides an overview of "The Economics of Justice," depicting complex economic notions in a systematic way that makes them accessible to social scientists who are unacquainted with this discipline. The authors suggest that, for most of the twentieth century, theoretical and empirical economic research was dominated by the rational self-interest axiom as a major driver of economic behavior. As a result, inquiry of issues related to morality and justice were relatively negligible within this discipline. Today, however, as shown in this chapter, justice research from an economic perspective has become predominant. Specifically, the authors

review experimental and survey evidence and its relation to justice theories that have been treated within descriptive (concerned with what "is") and prescriptive (concerned with what "ought to be") economic approaches. The chapter discusses the interplay between equality, as a principle of justice, and efficiency and self-interest, as salient economic concerns. In this regard, game theory in general, and the ultimatum and dictator games in particular, are often an important framework for examining respondents' distribution preferences. Konow and Schwettmann then provide empirical evidence to support the postulate that equity (or proportionality) and desert (or merit) principles of justice are not merely variants of equality, but rather represent distinct preferences for inequality. In the spirit of the justice multi-principle approach, though focusing on economic issues, the authors suggest that respondents combine different types of justice and economic evaluations and that these evaluations are affected by the context in which they occur.

1.4   Part II: The Justice Motive

Probably the most prominent program of justice research that has been developed within the ISJR refers to the justice motive. This program, initiated by Melvin Lerner in 1965, has striven to characterize the type of motivation underlying justice behavior. Scholars who have devoted their thinking and research programs to the justice motive assume that is both fundamental and unique. This implies that the justice motive cannot be reduced to self-interest, which has been a maxim of economic behavior. In Chap. 6, "Justice and Self-Interest," Leo Montada and Jürgen Maes provide a wealth of important insights and ideas about self-interest, as well as the claim that justice is a major driving force of human behavior that cannot be reduced to self-interest. The authors first describe the self-interest motive, which has been proposed in the framework of rational choice theory as an universal motive guiding human behavior, and how this motive is awakened under various conditions (e.g., making selfish decisions in social dilemma games). They

then provide ample theoretical considerations and empirical evidence from the social sciences that both challenge the universality of the self-interest motive and put the justice motive at the forefront as a universal driving force which, at times, supersedes self-interest. The second half of the chapter suggests that while the justice motive is universal, particular perceptions of justice across domains, such as the preference for various distribution principles, are not universally shared. In this regard, the authors elaborate on the role of justice as a source of social conflict and a condition for peacemaking. In other words, in this sort of arena, while the justice motive is universal, its concrete manifestation may be contested and affected by specific social conditions.

Chapter 7, "The Justice Motive: History, Theory and Research," by Mitchell Callan, John Ellard and Annelie Harvey, introduces Melvin Lerner's influential justice motive theory and reviews research inspired by that theory. Lerner suggested that people have a need to believe in a just world and that the belief in a just world (BJW) is a manifestation of the justice motive. He argued that people make sense of their experiences by believing that everyone gets what they deserve and deserves what they get. Believing that good things happen to good people and bad things to bad people implies a sense of control. If people believe in justice, they can trust to receive positive outcomes in return for decent behavior and delayed gratifications in return for investments. Believing in justice provides a basis for personal contracts that warrant rewards for compliance with social norms and expectations. The chapter provides an excellent presentation of these assumptions and experimental findings supporting them. The authors also discuss in detail the strategies that people employ to defend their BJW when it is challenged—for instance, when coming across an innocent victim. A straightforward strategy in such a situation is to help. However, helping the victim is not always possible or may be too costly. In such cases, observers can defend their BJW by taking a second look at the event and reappraising it. Specifically, they can make themselves believe that the harm was minor, that it was deserved, or

that the victim will be compensated eventually. The chapter reviews research in support of each of these equivalent strategies that serve the justice motive by protecting the BJW.

Chapter 8, by Carolyn Hafer and Robbie Sutton, reviews research on the "Belief in a Just World" as a personality construct. Based on Lerner's assumption that the BJW is an expression of the justice motive, several authors have proposed using individual differences in BJW strength as an indicator of individual differences in justice motive strength. Rubin and Peplau (1973), who developed the first BJW scale based on this reasoning, found individual differences measured by their scale to be correlated with reactions to injustice as predicted by justice motive theory. Hafer and Sutton describe the development of the Rubin and Peplau scale, criticism of this scale and attempts to improve it. These attempts include suggestions to break down the BJW as a general construct into more specific facets, such as domain-specific BJW (e.g., sociopolitical, interpersonal, personal), BJW for self vs. for people in general, and different ways of believing in a just world (immanent, ultimate). The authors then go on to describe correlates of the BJW, such as reactions to victims and beneficiaries or ideological variables (political ideology, religiosity). Subsequently, they discuss studies that addressed the adaptive function of the BJW as originally assumed by Lerner. Based on a review of research findings, they suggest that the BJW is adaptive for the self, but may sometimes be maladaptive for society. Although many studies support the assumption that the BJW is an indicator of the justice motive, a substantial number of studies challenge this assumption. Hafer and Sutton conclude, in line with the authors of Chap. 6, that the BJW may not be an ideal indicator of the justice motive, because the justice motive operates automatically, whereas BJW scales tap-controlled judgments that can be, and often are, independent of automatic evaluations.

Chapter 9, on "Justice Sensitivity" by Anna Baumert and Manfred Schmitt, presents a personality construct introduced into the justice literature in 1995. The proposal of this construct reflects an observation that many justice researchers have reported—namely, that it is not possible to explain justice-related judgments, emotions, and actions solely by situational and contextual factors. Rather, individuals differ greatly in their reactions to identical incidents of injustice. It seems plausible to assume that these differences stem from how easily individuals perceive injustice and how strongly they react to it, hence their justice sensitivity (JS). Despite the authors' conjecture that JS includes a motivational component, the construct differs from the BJW in at least one important way: JS differentiates between the roles a person can play in justice-related incidents. Accordingly, it includes four facets: Victim Sensitivity (VS), Observer Sensitivity (OS), Beneficiary Sensitivity (BS), and Perpetrator Sensitivity (PS). The chapter reports the scales that have been developed for the assessment of these facets, the correlates that have been identified, and the role the facets play in predicting emotional and behavioral reactions to injustice. Based on their review of available research, the authors conclude that VS is motivationally more complex than the other facets. Whereas observer-sensitive, beneficiary-sensitive, and perpetrator-sensitive individuals seem to be motivated by a genuine justice concern for others, victim-sensitive individuals seem to be guided primarily by self-related justice concerns and a fear of being exploited. Baumert and Schmitt conclude by arguing that information processing, such as selective attention, selective interpretation, and selective memory are involved in JS and translate its effects into reactions to injustice.

In Chap. 10, Kees van den Bos and Michèlle Bal present "Social-Cognitive and Motivational Processes Underlying the Justice Motive." The authors outline a two-phase model of justice and self-interest that includes automatic (experiential) and controlled (rationalistic) routes to blaming victims. They link these automatic and controlled processes with the BJW, future orientation, coping with uncertainty and self-regulation processes. Specifically, van den Bos and Bal argue and demonstrate empirically that fast reactions to injustice occur automatically and reflect self-interest. Controlled reasoning that takes into

account moral norms and a genuine concern for justice later corrects these selfish impulses. The authors' self-regulation model of the justice motive assumes that the BJW helps people to cope with uncertainty and to trust in delayed gratifications for investments. This trust is essential for making long-term plans in social relations, work, and economic decisions.

1.5   Part III: Forms of Justice

Chaim Perelman's (1967) metaphor of the prism-like concept of justice aptly reflects the contents of Part III of the handbook, which encompasses the conceptualization and empirical examination of the multifaceted forms that are evoked by the notion of justice. As mentioned before, the study of these forms of justice is rooted in the past. However, their study within the ISJR is elaborated and further developed within existent paradigms.

The first facet, distributive justice, refers to the perceived justness of the principles and rules that regulate resource distribution (e.g., effort, need) and to evaluation of the actual outcomes of the distribution in relation to expected outcomes. In Chap. 11, "Distributive Justice," Guillermina Jasso, Kjell Törnblom, and Clara Sabbagh show that distributive justice theory has developed in a steady, cumulative fashion. Using Jasso's theoretical framework as a general umbrella under which these developments are reviewed, authors refer to three interrelated topics that have guided justice research (Jasso, 1989): (a) the identification of principles and their more specific rules that "ought" to regulate the distribution of societal resources ("goods" and "bads") to individuals or groups; (b) assuming that people strive to get what they (think they) deserve, this topic delves into the magnitude of perceived injustice; (c) the psychological and social consequences of perceived injustice. The chapter focuses on contributions to the theory of distributive justice before and during the twentieth century and in more recent developments. Readers interested in reviews of more empirically oriented research of distributive justice, are invited to read Chaps. 3–5.

The second facet, procedural justice, focuses on the justness of the procedures according to which resource distribution takes place. That is, the focus is on the "processes" rather than the "outcomes" of resource distribution. In Chap. 12, Riël Vermunt and Herman Steensma present a comprehensive mapping of existent theory and empirically oriented research on "Procedural Justice." After reviewing early conceptualizations of the principles of procedural justice in the political and legal domains by scholars such as John Thibaut, Laurens Walker, and John Rawls (in the 1970s), the authors describe the developments of more contemporary psychological and sociological studies of these principles across domains. They also specify when and how the sense of procedural fairness is awakened. In this respect, the authors refer, for instance, to van den Bos and colleagues' theory of Management of Uncertainty (see Chap. 10 in this handbook) and to the models of relational authority in groups which was developed by Tyler and Lind (1992). The chapter concludes with the description of an extensive body of research that has focused on the consequences of procedural (in)justice, such as emotions, cognitions, and organizational outcomes (e.g., cooperation and commitment).

The third facet, retributive justice, refers to expected negative outcomes related to resource distribution. In this case the valence of a resource is framed by the observer as a "bad" (e.g., punishment or imprisonment). Historically, justice research has focused its attention on the distribution of positive resources, assuming that the understanding of that domain also applies to the distribution of negative resources. However, research has suggested that justice pertaining to positive and negative resources may involve distinct processes. In Chap. 13, "Retributive Justice," Michael Wenzel and Tyler Okimoto provide a thought-provoking theoretically and empirically grounded discussion of the distinctiveness of the retributive justice facet. While recognizing the importance of the study of this justice facet across disciplines, they adopt a psychological perspective with the aim of examining various individual processes related to the general phenomenon of "punishment as a response to wrongdoing."

The authors provide a multifaceted perspective that involves, for instance, a review of the evolutionary origins of punishment, the assertion of punishment as a basic justice motive, showing how punishment addresses basic psychological needs and concerns, and the examination of individuals' adoption of specific socially prevalent philosophies of punishment. Finally, the chapter challenges the existing notion of retribution and punishment by considering other options of just repair, such as forgiveness or "restorative justice," which (as extensively discussed in the following chapter) focuses on repairing the harm done by the transgression.

The fourth facet, restorative justice (or reparative justice) also deals with negative outcomes, but rather than stressing formal procedures to redress justice, it focuses on informal processes whereby the victims, offenders, and communities are encouraged to undertake steps (e.g., apologies, community service or return of stolen goods) to repair the harm. In Chap. 14, "Restorative Justice," Ron Cohen presents an in-depth overview of this facet of justice and the psychological factors that affect participants and members of the public who are involved in its practices. The author suggests that restorative practices involve voluntary face-to-face interaction among parties, which is often mediated by a third party. These mediated interactions aim at a shared understanding that serves as a platform for reaching lasting conflict resolution. Moreover, restorative practices are structured by narratives of harm that rely on memory and shared rituals meant to (re) establish a sense of justice. These structural characteristics, in turn, are present across practices in micro- (dyads), meso- (triads), and macro- (state) levels of analysis. Finally, the chapter suggests that, in comparison to other facets of justice, "restorative practices might provide a deeper and more systematic examination of the settings in which claims about injustice are contested."

1.6   Part IV: Spheres of Justice

The forms of justice described above have been "contextualized" in terms of Michael Walzer's (1983) classic *Spheres of Justice*. In this book,

Walzer proposes a radically pluralistic theory whereby society may be divided into a number of distinct distribution spheres or "spheres of justice," such as work, education, and kinship. Each of these spheres distributes different basic societal goods (e.g., money, knowledge, love) according to different distribution principles. Principles that correspond to one sphere of distribution do not necessarily correspond to another. Moreover, the establishment of a just society requires that each sphere of distribution have relative autonomy, activating principles unique to it and avoiding the "intrusion" of principles that apply to other spheres. In this understanding, individuals and groups may hold different resources which allow them to occupy different ranks in different spheres. Moreover, these distribution principles develop in the framework of common meanings and understandings of a particular society. Although all societies may have similar distribution spheres, each society assigns different cultural meanings to the resources distributed within these spheres and, therefore, also to the principles guiding resource allocation. As elaborated below, this handbook examines a variety of spheres of justice: politics, welfare, work, family, education, the environment, and nonhuman justice.

Social justice serves as an important standard for the evaluation of political ideologies, systems, and leaders. Political authorities have an obligation to establish, maintain, and defend social and economic structures that ensure justice. Citizens demand a fair distribution of common goods, such as education and social services, but they also expect a fair distribution of burdens, such as taxes and community work. It comes as no surprise, therefore, that justice is at the heart of political ideologies and serves as an imminent promise in political campaigns. Tobias Rothmund, Julia Becker, and John Jost begin Chap. 15, "The Psychology of Social Justice in Political Thought and Action," with a description of the role that conceptions of justice play in political ideology. They review research on the links between political ideology, moral intuitions, preferences for principles of distributive justice, the attribution of poverty, and attitudes

towards rule breaking, such as tax fraud or criminal behavior. They present System Justification Theory and the explanations it provides for conservative political attitudes and the political status quo. The next part of the chapter discusses procedural justice in the political arena, arguing that those political authorities and institutions which adhere to procedural fairness principles acquire political legitimacy, and this, in turn, promotes civic engagement of the population. The chapter concludes with empirical evidence supporting relative deprivation theory, which assumes that collective injustice (fraternal deprivation) is a frequent source of political protest. The authors suggest that protest in reaction to relative deprivation can abate as a result of motivated cognition that justifies the social, political, and economic status quo. Relative deprivation can also promote social identity-managing strategies aimed at preserving the positive distinctiveness of one's group. These strategies include changing the standard of comparison, group membership (social mobility), or the reference out-group with which the in-group is compared (downward comparison).

In Chap. 16, "Social Justice and the Welfare State: Institutions, Outcomes and Attitudes in Comparative Perspective," Patrick Sachweh presents a comprehensive and systematic overview of a large body of theoretical and empirically oriented (distributive) justice research that has examined redistribution of resources across welfare states according to different justice principles. The overview focuses on three main perspectives. The first is *institutional*, applying the typology of welfare states proposed by Esping-Andersen. This perspective specifies the distribution principles that are emphasized in various types of welfare states (liberal, conservative, and social-democratic) and the extent to which these principles are implemented in welfare policies and programs. The second perspective is *socio-structural*, focusing on the "real-world outcomes" of institutional redistributions, such as the degree of poverty or security benefits. The third perspective is *attitudinal*, i.e., citizens' distribution preferences and the extent to which they match institutional and structural perspectives. The review indicates that resource redistribution

is indeed guided by different distribution principles in different types of welfare states. The liberal state underscores the principle of need; the conservative stresses the principle of merit; and the social-democratic type highlights the principle of equality. However, in practice, the different types of welfare states are guided by a mixture of distribution principles. Finally, Sachweh argues that future research should give more scholarly attention to the study of social justice and welfare over time and in non-Western contexts.

People do not only want to live in societies governed by fair administrations and fair institutions that provide justice on the macro level; they also expect fair treatment at work and fair pay. It is worth noting in this respect that the first and perhaps most important modern theory of social justice, equity theory, was originally applied to the domain of work and only later generalized to other spheres, such as romantic relationships. Given the great importance of work in peoples' lives and given that labor is often embedded in organizational contexts, there is a clear need for research indicating which organizational structures and processes ensure that employees feel they are treated fairly. It is for this very reason that organizational justice has become a flourishing branch of social justice. Marius von Dijke and David de Cremer provide an overview of this sphere in Chap. 17, "Justice in the Work Setting." The authors divide the large field of organizational justice into four sections: the role of justice in personnel selection, justice and employee motivation, justice and leadership, and the role of justice when employees leave the organization. Within each theme, they review research findings that convincingly demonstrate the high importance of justice in work settings. Employees who feel they are treated fairly are satisfied with their work and engage in organizational citizenship behavior. These consequences are beneficial for the organization and employees alike. By contrast, unfair treatment undermines the work satisfaction of employees and can even promote counterproductive work behavior, such as damaging equipment or stealing products.

In Chap. 18, Dorothea Dette-Hagenmeyer and Barbara Reichle focus on the family as a sphere of justice in which different types of resources

are being distributed. The authors give special attention to recent research that has examined justice issues pertaining to close relationships—such as divorce and the division of child care and its consequences among partners. Moreover the chapter reviews the most salient area of justice research in the family—namely, the division of household work such as between partners referring to childcare, repairs, cooking, and so on. In spite of social change, the division of housework continues to be gender-specific and unequal. Authors review the different explanations for these reproduction trends and their consequences. Finally they refer other areas of justice in the family which have been relatively neglected—justice among same-sex couples, siblings, and other intergenerational issues.

In Chap. 19, "Justice in Education," Nura Resh and Clara Sabbagh apply Walzer's distinction of education as a specific justice sphere, discussing five educational subspheres in which resources (or sanctions) are distributed and their fairness is evaluated by its main beneficiaries—the students. Specifically, they examine the subspheres of access to education (and resource allocation to realize access), allocation of learning places, allocation of teaching methods and pedagogy, grading, and teacher–student relations. While issues related to equality (or inequality) of educational opportunities (e.g., achievement gaps, racial inequality) in contemporary societies have been salient in public and academic discourses, the explicit approach to education as a distinct sphere of justice in itself has received negligible scholarly attention. Only in recent decades has it become a new and growing field of study. Following Jasso's definition of the central questions that guide investigation in the justice domain, Resh and Sabbagh discuss how these educational subspheres are structured to deal with the "just," the "actual" and the "consequences" of injustice in their distribution.

Chapter 20, by Susan Clayton, Elisabeth Kals, and Irina Feygina, presents a comprehensive and systematic review of "Justice and Environmental Sustainability," focusing on the environment as a sphere of justice and a distinctive domain of justice research. The authors specify the resources being distributed in the environmental sphere

and the justice principles that may guide their distribution, also pointing to the problematic application of the well-known principles of need and equity. These distributions, as well as motivations for and ideologies regarding environmental sustainability, may, in turn, determine whether a particular group is marginalized and thus affected by environmental harm (e.g., air pollution). The chapter then reviews empirically oriented research suggesting that environmental justice is perceived differently by different groups (e.g., political affiliation) and policies. Finally, the authors pinpoint various justice perceptions, motives, and attitudes towards the environment that affect people's behavior.

Chapter 21, by Catherine Talbot, Sara Price and Sarah Brosnan, deals with an unique sphere of justice, namely, "Inequity Responses in Nonhuman Animals." The chapter is of utmost interest as it deals with a topic that has been relatively neglected by the community of social science justice researchers. Adopting a comparative perspective, the authors cover a large body of justice research in nonhumans (with a focus on primates), aimed at highlighting "the importance of the nonhuman literature for understanding the evolution of fairness in humans." This is achieved by describing in depth the types of conditions in which inequity responses are awakened. In this regard, it is worth noting that in nonhuman primates, these responses are measured by behavior rather than motivations because, in contrast to humans, primates are unable to express inner motivations. The chapter also describes relationships between inequity responses and other types of behavior, such as prosociality, retribution, and delay of gratification. The authors conclude that humans and nonhumans share some traits and behavior in their responses to inequity, but are also unique in their responses.

1.7 Part V: Beyond Justice

Finally, in order to develop a deeper theoretical understanding of the notion of justice, this handbook stresses the importance of examining the interplay of justice with related notions, such as morality, legitimacy, and social resources.

Further, given that existent justice research is biased by focusing on Western countries, this final part of the handbook stresses that more attention needs to be paid to the notion of justice in the non-Western world (See Chap. 25).

Chapter 22, written by Linda Skitka, Christopher Bauman, and Elizabeth Mullen deals with the interplay of "Morality and Justice." The chapter taps major issues related to this theme, particularly the convergence and divergence between the notions of morality and justice across varied psychological and social–psychological theories over time (e.g., justice research, scope of justice, the functional pluralism model of justice, moral foundations theory, and the moral motives model). For instance, in the early theories of moral development (e.g., Piaget and Kohlberg), justice was considered an integral, nondistinguishable part of morality. Only later, as shown by the authors, did justice become a research domain in its own right, though connected to morality. In addition to presenting the dialectics between morality and justice research, the chapter provides a critique of this body of research, discusses its relative advantages, and limitations, and suggests that an exchange between the paradigms may be mutually efficient.

Chapter 23, on the "Social Dynamics of Legitimacy and Justice" by Karen Hegtvedt, Cathryn Johnson, and Lesley Watson, focuses on the complex interplay of legitimacy and justice, comprehensively reviewing a large body of theoretical and empirically oriented research. After providing a multidisciplinary look at the notion of legitimacy, the chapter reviews research on the varied effects of distributive, procedural, and interactional justice on legitimacy, and vice versa. Analyzing familiar research through a novel lens, the authors suggest that these effects are related to such issues as power relations, social change, and social comparisons. By looking at existing research in a new way, the chapter identifies important areas for future justice research.

In Chap. 24, "Archives and Social Justice Research," Susan Opotow and Kimberly Belmonte demonstrate that archives can be a valuable source of knowledge about injustice resulting from abuse of power, arguing that archives contain detailed documentation of how victims and observers of persecution redress injustice. Opotow and Belmonte illustrate the value of archives as a source of data for social justice research with five examples. The studies they report deal with domestic work under apartheid in South Africa; educational injustice and queer militancy; land claims based on ancestral rights; the Black Panther Party's community activism; and political posters designed by social movements. The authors conclude that archive-based justice research can help identify historical changes in norms, contribute to redressing prejudice and preserve collective memories of injustice. They also point to the challenges of working with archival data, such as the biases of the collectors of documents, which may represent one side of a conflict and not tell the whole story.

Reflecting on justice from comparative points of view facilitates identification of the scope of justice, its potentially different meanings and its function as principles in peoples' lives. In Chap. 25, "Justice and Culture" by Ronald Fischer, cultures provide the basis for these comparisons. The author argues that justice concerns are universal and reflect a general strategy of social conflict resolution that has evolved due to its adaptivity. Although justice is a universal concern, cultures differ in how, when, and why justice becomes an issue that needs to be resolved. Emphasizing the organizational sphere, Fischer reviews available research on cross-cultural differences in distributive justice (rules, criteria, and practices), procedural justice (rules, criteria, and practices), interpersonal justice, values that modify justice perceptions, and reactions to perceived injustice. His review of findings reveals substantial cross-cultural differences whose sociological, psychological, and economic origins are still largely unknown.

Finally, Chap. 26, Between Relative Deprivation and Entitlement: An Historical Analysis of the Battle for Same-Sex Marriage in the United States, by Ella Ben Hagai and Faye Crosby, focuses on laws and norms with respect to same-sex families in the United States. Specifically, it presents a vivid analysis of historical processes that culminated in the (legal) institutionalization of same-sex marriage in this country. During the 1950s and 1960s, same-sex

desire was understood by mainstream American society to be deviant. This epoch, described by the authors as "extreme repression," was also relatively affluent and led many marginalized groups to claim equal rights. A sense of entitlement and deservedness became more evident among gays and lesbians in the 1970s, but it was not until the first decade of the twenty-first century that they achieved formal legal recognition and equal rights as same-sex married couples. The chapter makes use of analytical justice notions, such as entitlement and deservedness, relative deprivation, and scope of justice in understanding how gay and lesbian couples were legitimately recognized and bestowed the right to have a family.

In sum, this introduction and the short presentation of Handbook's Chapters is meant to stimulate the inquisitiveness of potential readers interested in social justice research and guide others in delving into the Handbook's contents. Chapters' delineation reveals once again, the centrality of justice in both human and nonhuman behavior. Moreover, it aptly reflects Chaim Perelman's metaphor of the prism-like concept of justice: (a) justice is examined using different disciplinary lens such as—philosophy, sociology, psychology, and economics; (b) the notion of justice is multifaceted—including distributive, procedural, retributive justice, and restorative justice; (c) justice is elicited in multiple societal spheres of distribution such as—politics, welfare, work, family, justice environment, nonhumans; (d) justice meanings should be examined within

nomological networks and across cultures over time. With this background in mind, we now invite you to read and enjoy the full and fine contributions of justice scholars in the International Society of Justice Research.

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Part I

Disciplinary Approaches

Philosophy of Justice: Extending Liberal Justice in Space and Time

2

Lukas H. Meyer and Pranay Sanklecha

2.1 Introduction

In this chapter, we introduce and sketch themes in the contemporary political philosophy of justice. We focus on Rawlsian political philosophy for two reasons. First, Rawls's work is the most important contribution to contemporary political philosophy of justice, and must therefore be given a prominent place in any account of the state of the discipline. Second, while the field has developed well beyond Rawls's contributions,[1] we believe that understanding Rawls is the key to understanding the subsequent developments. We begin, therefore, with an extended discussion of Rawls's theory. We will then sketch two major developments and current debates in contemporary political philosophy. This sketch has a dual function. It is valuable in itself, for anyone wishing to become acquainted with what is going on in contemporary political philosophy, and it is also valuable, we hope, in providing examples of how one can use Rawls's work to understand current debates.

Our essay consequently has the following structure. We begin (Sect. 2.2) with a brief sketch of the broad outlines of Rawls's theory of justice, concentrating on the elements that have proven to be the most influential in the field. We then focus on one particular feature of his theory (Sect. 2.3), namely the claim that "the primary subject of the principles of social justice is the basic structure of society, the arrangement of major social institutions into one scheme of cooperation" (Rawls, 1999a, p. 47). This is then the basis for the next two parts of our essay, in which we discuss the developments mentioned above, namely the debates on international (Sect. 2.4) and intergenerational justice (Sect. 2.5).

2.2 A Brief Sketch of Rawls's Theory of Justice

Rawls understands society as a fair cooperative venture between free and equal persons in which individuals pursue their conceptions of the good life. Rawls's aim is to provide principles of social justice, i.e., principles that govern how a society as a whole should be organized and maintained. He provides these principles for the ideal case of

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[1] We describe some of these developments later in this essay.

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a "well-ordered" society, where the society in question is faced with "realistic, though reasonably favorable, conditions" (Rawls, 2001, p. 13) and there is strict compliance with the principles of justice. Rawls is engaging in "ideal theory," rather than, for example, examining how social institutions should be organized in societies which face severe scarcity of resources. Another restriction is that these principles of justice are meant to apply within societies; they do not hold for the global order of states.[2] Furthermore, Rawls restricts his argument to liberal democratic societies: he argues for principles that must be followed in order for a liberal democracy to be just.

Rawls (1980) regards the task of justifying a conception of justice as primarily the "practical social task" of "articula[ting] a … conception of justice that all can live with who regard their person and their relation to society in a certain way" (p. 519). For Rawls "justification is argument addressed to those who disagree with us, or to ourselves when we are of two minds … Being designed to reconcile by reason, justification proceeds from what all parties to the discussion hold in common" (Rawls, 1971, p. 580). When we are of two minds we are not in "reflective equilibrium." To be in reflective equilibrium means to have reached the status of personally or interpersonally being able to agree with a theory after a process of self-examination in which one took account of all possibly relevant considerations.[3]

These considerations include considered moral judgements "at all levels of generality" (Rawls, 1971, p. 8). We have reason to consider these judgements reliable since they were formed under conditions which render them likely to be correct (Rawls, 1951, pp. 181–183). People often disagree about these judgements and for Rawls, the deep disagreement of people in liberal societies concerns the proper relation of liberty and equality (see Rawls, 1993, p. 227) and individuals often hold an apparently inconsistent set of such judgements (e.g., when they hold both that

all people ought to be treated equally and that compatriots take priority in the allocation of medical services at state hospitals). What goes into the philosophical process of examination ought to present those seeking reflective equilibrium "with all possible descriptions to which one might plausibly conform one's judgements together with all relevant arguments for them" (Rawls, 1971, p. 49). For Rawls, these arguments may be informed not only by the leading traditional moral theories (such as utilitarianism, perfectionism, and contractarianism), but also by, e.g., considerations of psychological theories, political science, and theories of epistemology.

The conception of justice which is eventually accepted is not necessarily the one which accounts for the considered moral judgements with which those seeking reflective equilibrium begin. Rather, the conception which accords with all relevant considerations and moral principles matching considered moral judgements duly revised in reflective equilibrium is affirmed. Eventually, by the process of adjustment of all parts, we can reach an understanding which we can accept as a whole, i.e., a conception in reflective equilibrium. Rawls claims this is the theory it is reasonable to adopt: "Justification rests upon the entire conception and how it fits in with and organizes our considered moral judgements in reflective equilibrium … [J]ustification is a matter of the mutual support of many considerations, of everything fitting into one coherent view" (Rawls, 1971, p. 579).

A theory of justice is justified relative to the person(s) involved in the process of reflective equilibrium. In his post-*A Theory of Justice* writings Rawls can be understood to have responded to, among other things, his so-called communitarian critics (see Mulhall & Swift, 1996). Now he interprets his coherentist conception of justification and reflective equilibrium in a pragmatic way that relativizes the conception of justification, and its tasks and methods, to a sociohistorical context.

Ethical inquiry should be directed toward the resolution of value-conflicts as they can be found in particular sociohistorical traditions. The test of a conception of justice is its success at resolving value disagreement among concerned parties. The considered moral judgements can be interpreted

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[2] Rawls himself uses the term "peoples" and peoples are not the same as states.

[3] For a helpful discussion of Rawls's method of reflective equilibrium see Daniels (1979), Scanlon (2002). For a critical assessment see, e.g., Raz (1982).

as settled convictions of a sociohistorical tradition, held by people who belong to that specific culture. In order to overcome the deep disagreement on the proper relation of liberty and equality, we have to organize our convictions "by means of a more fundamental intuitive idea within the complex structure of which the other familiar intuitive ideas are then systematically connected and related" (Rawls, 1985, p. 229). In Rawls's conception of justice as fairness, this "more fundamental idea" is that of a society as a system of fair cooperation between free and equal persons.

The task is then to come up with principles of justice which systematize the intuitive idea and our moral convictions by appealing to "the deeper bases of agreement embedded in the public political culture of a constitutional regime and acceptable to its most firmly held convictions" (Rawls, 1985, p. 229). These principles apply to a particular set of social institutions within a society, namely the "basic structure," which comprises the most important social institutions, such as the economy, the legal system, etc. [4] In Rawls's view, social justice requires that the basic structure be organized and run according to the principles of justice; but once that structure is in place, it does not require that individuals act according to those principles in their daily lives.

The function of principles of justice is to "assign … basic rights and duties and … determin[e] … the proper distribution of the benefits and burdens of social cooperation" (Rawls, 1999a, p. 5). For Rawls, the relevant goods to be distributed are "primary goods," which he defines as "things that every rational man is presumed to want. These goods normally have a use whatever a person's rational plan of life"[5] (Rawls, 1999a,

p. 54). In order to work out what these principles are, Rawls employs the famous device of the original position. The idea behind the original position is both powerful and simple. Rawls is trying to work out principles that govern how people ought to live together in a society. One way of doing this is to ask: what principles would people agree to live under? In the real world, the agreement would be affected by factors such as the power relations between individuals and their knowledge of their prudential interests. These seem intuitively to be factors which should not be relevant to determining principles of justice. Therefore, Rawls places the parties in the original position behind the "veil of ignorance," which means that they do not have knowledge of "the particular features and circumstances of persons" (Rawls, 2001, p. 16), including their own.

Consequently, the eventual agreement is not tainted by power relations or naked self-interest. The idea of the original position, with the parties being behind a veil of ignorance, also expresses the liberal ideal of persons as free and equal. It expresses the ideal of persons being equal because all members of society are equal parties in the original position, "by the fact that these representatives are symmetrically situated in that position and have equal rights in its procedure for reaching an agreement" (Rawls, 2001, p. 20). It expresses the ideal of persons being free in a number of ways. For instance, parties know that each representative in the original position is free in the sense of having the power to form their own conception of the good (they do not know the particular fact of which conception of the good they hold). This knowledge affects the principles of justice that will be agreed on in the original position, because these principles will have to honor and promote that freedom of each individual person (to the extent it is compatible with the freedom of all others).

The original position is a "device" of representing central considerations that are relevant for justice. It is not meant to be an account of either an actual or hypothetical agreement. It aims to model, first, "fair conditions under which the representatives of citizens, viewed solely as free and equal persons, are to agree

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[4] See the next section for extensive discussion of this idea.

[5] One of the central issues in the debate has been to work out what the relevant goods are for principles of distributive justice. This is the so-called "equality-of-what" question (Sen, 1980). Some of the important candidates that have been proposed as the currency of distributive justice are equality of opportunity (for resources, or welfare, or both, with the latter construed as equality of access to advantage), equality of resources directly, capabilities and basic needs. See also Braybrooke (1987), Cohen (1989), Dworkin (1981), Nussbaum (1992), Nussbaum (2000), Sen (1992).

to the fair terms of cooperation whereby the basic structure is to be regulated" (Rawls, 2001, p. 17), and, second, "acceptable restrictions on the reasons on the basis of which the parties, situated in fair conditions, may properly put forward certain principles of political justice and reject others" (Rawls, 2001, p. 17).

We can now state Rawls's principles of justice:

(a) "Each person has the same indefeasible claim to a fully adequate scheme of equal basic liberties, which scheme is compatible with the same scheme of liberties for all; and

(b) "Social and economic inequalities are to satisfy two conditions: first, they are to be attached to offices and positions open to all under conditions of fair equality of opportunity; and second, they are to be to the greatest benefit of the least-advantaged members of society (the difference principle)" (Rawls, 2001, pp. 42–43).

We now turn to more detailed discussion and focus first on the claim that "the primary subject of the principles of social justice is the basic structure of society, the arrangement of major social institutions into one scheme of cooperation" (Rawls, 1999a, p. 47).

2.3 Justice and the Basic Structure

According to Rawls (1971) "justice is the first virtue of social institutions, as truth is of systems of thought" (p. 3). His theory of justice is largely concerned with a subset of these social institutions, namely the institutions of the so-called basic structure of society (Rawls, 1971). Rawls (1993) claims that the basic structure of society is "the first subject of justice" (p. 257) and the development of a conception of justice for this subject has "a certain regulative primacy with respect to the principles and standards appropriate for other cases" (pp. 257–258). Rawls provides the following preliminary definition of the basic structure: it is "the way in which the major social institutions fit together into one system, and how they assign fundamental rights and duties and shape the division of advantages that

arises through social cooperation. Thus the political constitution, the legally recognized forms of property, and the organization of economy, and the nature of the family, all belong to the basic structure" (Rawls, 1993, p. 258; see also Rawls, 1971, p. 23; Rawls, 2001, p. 10).

The basic structure is identified in this way because Rawls wants to demarcate a particular subject for his principles of justice, namely "the domain of the political" (see e.g., Rawls, 1993, pp. 11–12). The political domain for Rawls is distinguished by two features above all. First, membership of it is involuntary. Entering it is clearly involuntary, because it is caused by an accident of birth. Further, for Rawls's purposes, which have to do with formulating principles of justice for a closed society, exit is also involuntary.[6] The second distinguishing feature of the political is that "political power is always coercive power backed by the government's use of sanctions, for government alone has the authority to use force in upholding its laws" (Rawls, 1993, p. 136). Consequently, for Rawls, "the political is distinct from the associational, which is voluntary in ways that the political is not; it is also distinct from the personal and the familial, which are affectional again in ways the political is not" (Rawls, 1993, p. 137). Having identified this domain of the political, Rawls's aim is to provide "a moral conception worked out for a specific kind of subject, namely for political, social, and economic institutions" (Rawls, 1993, p. 11). This moral conception is the political conception of justice, and the aim of such a conception is to answer the fundamental question of "what is the most appropriate conception of justice for specifying the fair terms of cooperation between citizens regarded as free and equal, and as fully

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[6] Rawls does not ignore the importance of immigration (see Rawls, 1993, p. 136, fn. 4). But he considers that it is appropriate to "abstract from it to get an uncluttered view of the fundamental question of political philosophy" (Rawls, 1993), namely what principles of justice should govern a society that "is to be conceived as a fair system of cooperation over time between generations" (Rawls, 1993, p. 18). The question of immigration is to be dealt with a later stage, when "discussing the appropriate relations between peoples, or the law of peoples" (Rawls, 1993, p. 136, fn. 4).

cooperating members of society over a complete life, from one generation to the next" (Rawls, 1993, p. 3).

We can say that by his description of the basic structure, and his interpretation of its normative significance, Rawls dignifies the political. The political space is where the fundamental issue arises of how individuals, each holding their own particular conceptions of the good (which may and often will conflict), can nonetheless agree on the principles that should coercively govern their association as a society, and in a way which respects each as free and equal. Further, this domain is not just where the issue arises—it is also where it must be settled.

This separation of the political domain from comprehensive conceptions of the good identifies the subject of justice. The principles of justice apply directly to the political domain, and not, for example, to associational or affectional relations.[7] The demanding principles of distributive justice identified by Rawls (the well-known principles of equal rights to basic liberties, equality of opportunity, and the distribution of basic goods to the maximum advantage of the worst-off) apply to the set of institutions that constitute the basic structure. Additionally, the principles hold specific rules for transactions between the individuals who are members of a society formed by the basic structure.

2.3.1 What Is the Basic Structure?

Three features have often been understood as providing criteria for identifying what belongs to the basic structure. First, pervasive influence on the life prospects of people who live under those institutions constituting the basic structure (see e.g., Cohen, 1997; Hodgson, 2012); second, it is the institutions of the basic structure which create the basic conditions of stable social cooperation (see e.g., Heath, 2005); third, the institutions of the basic structure have the coercive nature of political power (and are consequently in a special way in need of justification) (see e.g., Blake, 2002; Nagel, 2005).

While commentators have often understood the three features as mutually exclusive criteria for identification of the basic structure we suggest they ought to be understood as being joint criteria. The basic structure is an institutional expression of a complex ideal of justice,[8] which is realized by those persons who engage in fair cooperation according to principles of social justice. They thereby autonomously choose their lives under conditions of pluralism of conceptions of the good life. The basic structure renders these morally important choices and relationships possible, because the options that are available to members of the society are essentially determined by the institutions of the basic structure. When the basic structure is just, the resulting procedural background justice ensures that the decisions and actions of individuals in pursuit of their projects do not undermine the possibility of cooperation as free and equal persons.

2.3.2 The Constitutive and Instrumental Significance of the Basic Structure for the Validity and Realization of Rawls's Ideal Principles

What is the relation, if any, between the idea that the basic structure is the first subject of justice and the scope as well as validity of the principles of distributive justice?

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[7] This issue was famously the site of one of the important feminist objections to Rawls's theory, which argued that the family, despite being what Rawls would call an affectional association, is an institution that does belong to the basic structure and is subject to the principles of justice (see Kittay, 1999; Okin, 1989).

[8] Rawls justifies the idea of the basic structure as the first subject of justice coherently in terms of his method of the reflective equilibrium (see e.g., Rawls, 1993; fn. 8, and see Sect. 2.1, above): The main ideas justify each other; the justification of the idea of the basic structure is based on identifying a systematic connection with the other main ideas. Thus many of the considerations that Rawls presents in favor of the idea of the basic structure are connected with the other main ideas of his conception of justice as fairness.

For Rawls, the basic structure, first, is constitutive of the validity of his demanding principles of distributive justice, and a just basic structure (i.e., a society structured by Rawlsian principles of justice) is, secondly, instrumentally important because through it Rawlsian social justice is fully realized.

Rawls justifies the constitutive importance of the basic structure with two considerations: first, principles of justice or other moral standards can only claim validity for certain social subjects; the validity of Rawls's principles can be justified for the basic structure. Rawls argues for an irreducible plurality of principles which owe their existence to differences in the structure and the social role of institutions (Rawls, 1993, p. 262). Rawls proposes to methodically develop this pluralism of first principles in a way that the principles are sequentially ordered, so that the factual interconnectedness of the subjects or spheres is considered. The methodological primacy of the basic structure means that Rawls suggests to initially clarify the principles of justice for the designing and regulating of the basic institutions of a society. Later, principles of justice and moral standards for other subjects are to be justified, especially for issues of individual behavior under non-ideal conditions, for the regulation of international and transnational relations as well as intergenerational relationships and of private associations or non-basic institutions (Rawls, 1993, pp. 259–262; Rawls, 2001, pp. 11–12). Rawls justifies the constitutive importance of the basic structure, secondly, with the already mentioned first main argument in favor of the basic structure as the first subject of justice: The basic structure is a particularly important subject of justice because of its pervasive effects on the life chances of individuals. To be sure, it is not the empirical claim of the influence of the basic structure of society on the life chances of people that Rawls uses regardless of other considerations as an argument in favor of the idea of the basic structure as the first subject of justice (but see Cohen, 1997). Rather, Rawls argues for the characterization of the basic structure as the first subject of justice because justice as fairness requires a specific institutional form. The ideal of persons with a sense of justice and the ability to

develop a conception of the good and live by it, who treat others as free and equal and cooperate with them according to comprehensible rational principles and rules, requires a specific social order, i.e., a basic structure regulated in accordance with these principles and rules. The institutions that make up the basic structure thus rightly have a fundamental impact on the capabilities, talents, expectations, and interests of the members of society, on their options and opportunities in life. Only because these institutions have that influence, citizens can realize the ideal of exercising their essential moral abilities of autonomously pursuing their conception of the good while simultaneously respecting others as being free and equal in their exercise of the same abilities.

Second, a just basic structure (i.e., a society structured by Rawlsian principles of justice) is instrumentally important in the sense of being the condition of the complete realization of Rawlsian social justice. The basic structure maintains the background justice of society as a whole. Stable just circumstances are possible if the system of the basic institutions, whose rules are determined by the Rawlsian principles of justice, is accompanied by well-recognized rules for the cooperation between members of the society who pursue their respective conception of the good life autonomously and in doing so often form a private association (Rawls, 1993, p. 300f; see also Rawls, 2001, p. 10). The individuals and associations are free to make their transactions only when "elsewhere in the social system the necessary corrections to preserve background justice are being made" (Rawls, 1993, p. 269). Only these two sets of rules together, i.e., the rules for the basic institutions of society and the rules which individuals and associations have to follow (nongovernmental/non-basic institutions) in their transactions, can secure the conditions of fair cooperation between free and equal citizens. Persons should be free in the development and implementation of their respective life plans according to their conception of the good life. The reasonable pluralism of such conceptions that Rawls assumes is incompatible with the moral claims of, for example, a classical utilitarian position (see e.g., Rawls, 1993, pp.

xviii–xix.; Rawls, 1999b, p. 15). Nonetheless, individuals in the pursuit of their projects, in their numerous transactions, their cooperations in partly nongovernmental associations and in their contributions to non-basic institutions of society, have to follow the rules of a society regulated according to principles of justice. Then they behave in a fair way and preserve just conditions (Rawls, 1993, p. 284). If the citizens comply with conviction to the rules and it is publicly known that the justice of the society is maintained in this way, the society can be considered well-ordered (Rawls, 1993, pp. 201–202; see also Rawls, 2001, p. 8) and remains just, even if citizens violate the rules once in a while (Rawls, 1999b, p. 15).

2.3.3 The Idea of the Basic Structure, the Scope of Rawls's Principles of Justice and Pluralism of First Principles

What, if anything, follows for the scope of Rawlsian obligations of justice from the idea of the basic structure as the first subject of justice? (cf. Abizadeh, 2007).

The claim that the basic structure is the primary subject of justice is, first, understood in such a way that the basic structure is instrumentally important for the realization of justice. In his *Lectures on the History of Political Philosophy,* Rawls supports this interpretation by distinguishing the following questions for the discussion of any conception of justice: First, the question about the reasonable or true principles and their justification, and second, the question: "What workable and practicable political and social institutions most effectively realize these principles and keep society stable over time?" (Rawls, 2007, p. 215). His answer to this question is, as already shown: the basic institutions of the basic structure of society; the principles of justice can only be realized optimally by means of a basic structure. According to the second interpretation, the basic structure is a constitutive element of an ideal of justice. We assume neither that the existence of a basic structure is required

for the applicability of justice considerations, nor that the basic structure has only instrumental value for the realization of justice. Rather, the basic structure is constitutive for the validity of certain duties of justice, and according to Rawls, apparently also for the duties defined by the Rawlsian principles. Furthermore, there can be other duties, whether they are called duties of justice or basic moral duties, which require individuals to render such just circumstances possible and to establish a basic structure and contribute to its fair adjustment. In addition to the rules for individuals and institutions, Rawls distinguishes other principles of justice and basic moral obligations, in particular for non-ideal conditions (see e.g., Rawls, 1971, pp. 7–8 and §§ 18–19; diagram Rawls, 1971, p. 94). Most importantly, this includes the "natural duty of justice" (Rawls, 1971, p. 99) which ascribes to individuals the duty to contribute to the establishment and preservation of a just society. For Rawls, there are other principles of justice for international relations and "local justice" (Rawls, 2001, p. 11). As Rawls emphasizes in *Political Liberalism*: The principles of his conception of justice "are plainly not suitable for a general theory" (Rawls, 1993, p. 261), neither for a general theory of morality (Rawls, 1993, p. 261, fn. 5) nor of justice (Rawls, 1993, p. 272, fn. 10), but only for the idealized case of the "relations among those who are full and active participants in society, and directly or indirectly associated together over the course of a whole life" (Rawls, 1993, p. 272, fn. 10).

Considered together, the first and second interpretations limit the scope of application of the Rawlsian principles of distributive justice to objects that can optimally be regulated by a basic structure; because only with regard to such objects must people fulfil the natural duty of justice to regulate it in a just way. According to Rawls, this is not the case for our relations with incurable, severely mentally disabled people or with animals. It is his view that other principles of justice or other moral standards may apply here (Rawls, 1971, p. 15). However, the fulfilment of the claims of justice defined by the principles for the basic structure is not necessarily morally more important than the fulfilment of other principles of

justice or moral standards for other subjects (see also Freeman, 2014, pp. 89–90). The methodological priority of the basic structure as a subject of justice is compatible with the possibility that, after taking into account the moral requirements of other subjects, the fulfilment of the principles of justice for the basic structure is linked to the fulfilment of these other moral requirements, or even that the latter have priority over the former. With regard to the principles of international and intergenerational justice this seems to be Rawls's view. The principles and obligations of international law and of fair interaction with future people limit the extent to which the principles of justice should be fulfilled within a single society. It would be impermissible to put the less advantaged in one's own society in a better position at the cost of unfair international trade relations, the non-fulfilment of the international duty to assist so-called burdened peoples who cannot establish stable just conditions without assistance (Rawls, 1999b, pp. 105–112, 112f), or at the cost of the breach of the principle of just savings, whose fulfilment is essential in order that future generations can live under conditions of justice (Rawls, 2001, pp. 159–160).

2.4   Extending Justice in Space: Global Justice

There is an obvious and close connection between political and social developments on the one hand and developments in political philosophy on the other; indeed, one author goes so far as to say that "living political philosophy arises only in a context of political urgency" (Williams, 2006, p. 155). While that may be a little exaggerated, the basic thought is plausible. Skinner, for instance, has shown how the political and military struggle of Italian city states for independence was intimately tied up with and an influential cause of theoretical changes, for example in understandings of the concept and conditions of liberty (Skinner, 1998). Closer to home, it is surely no coincidence that the modern renewal of (analytical) political philosophy began in the late 1960s and early 1970s in the USA, during a time of

much political upheaval in that country, such as the war in Vietnam and the growth of the civil rights movement. Unlike some other branches of philosophy, political philosophy has always been directly engaged with the social world and has always sought to respond to it.[9]

The research direction of political philosophers over the last three decades is not, given this point, surprising. Some of the biggest developments—political, social, technological, cultural—in that time have been the increased power of human action in both space and time; growing awareness of this power; and progressively deeper connections and interdependencies between all members of the global order (most obviously, states). As a consequence, the biggest growth areas in political philosophy over that time have, in our opinion, come in the area of what is sometimes called "extensions of justice;" i.e., in the fields of international/global justice and intergenerational justice.[10] In what follows, we will attempt to quickly sketch what we hope is a useful map of those two debates.

In this section, we discuss the extension of theories of justice to the global arena, and focus on the questions of international distributive justice: are there principles of international distributive justice? Are these the same as those that hold within single societies? Who are the relevant agents when it comes to fulfilling these principles: collectives such as states or individuals?[11] Building on the previous sections, we will use the

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[9] As Ryan (2012) shows in his excellent account of the history of political philosophy.

[10] Our claim is not that these subjects were new. There is a history of thinking about international justice (see e.g., Coulmas, 1990; Held, 1995; Beitz, 2005; Höffe, 2007) and intergenerational justice (see e.g., Birnbacher, 1988, Chapter 1; Jonas, 1984; Muniz-Fraticelly, 2009). Our claim is rather that in the last 30 years there has been a significant amount of work done on these issues (see e.g., Meyer & Roser, 2010 (on intergenerational justice); Blake & Smith, 2013 (on international distributive justice)).

[11] There are important other debates in the field of trans- and international justice that, owing to limitations of space, we do not discuss. For example questions of justice as related to issues such as immigration, just war theory, humanitarian intervention and assistance, territorial rights, colonialism, international trade.

idea of the basic structure to describe these debates. One of the earliest issues raised in the global justice debate was the question: is there a global basic structure? In seminal work, Beitz (1979) argued that there is a global basic structure, on the grounds that the global order demonstrated a significant degree of economic interdependence, significant enough to justify understanding the global order as a system of mutual cooperation. On that basis, he claimed that Rawlsian principles of justice ought to apply globally; that is, he accepted (more or less) the Rawlsian theory and (particular interpretations) of (a) the basic structure and (b) its relevance for justice, and on this basis sought to extend the scope of Rawlsian distributive justice.[12]

This view belongs to a family of views that has been given the label "cosmopolitanism." Cosmopolitanism has many varieties (see Caney, 2005, pp. 3–7; Pogge, 1994), but in our context the common feature of cosmopolitan views is that they all hold that the same principles of justice apply globally and domestically. Beitz's view itself can be separated into positions on three issues. First, there is the empirical question of whether there is a global basic structure. Second, there is the theoretical question of how best to understand what the basic structure is (see preceding sections). Third, there is the issue of if and how the basic structure is relevant for justice—that is, even if there is a global basic structure, does this imply anything for one's view on global justice? In terms of these three questions, Beitz, in the first edition of his monograph, answered the first question affirmatively (Beitz, 1979); this affirmative answer was grounded in part on his answer to the second question, namely in terms of structures of widespread trans- and international economic interdependence. Given a certain interpretation of the Rawlsian account of the relationship between the existence of a basic structure and justice, this meant that Rawlsian principles of justice governed (at least some of) the relations between people living in different states.

One of the most important strands of reaction to this view has consisted in attempting to work out how best to understand the basic structure.[13] Sangiovanni (2007), for instance, argues that the basic structure is to be understood in terms of reciprocity, and that for distributive equality as a demand of justice to apply, there has to be a relation between individuals such that they "ultimately rely … (on each other) … for the basic goods necessary to pursue and develop a plan of life" (p. 35). Another view, perhaps most famously advocated by Miller (2007), is that the ground of obligations of distributive justice—which can be understood as a functional equivalent of the basic structure for Rawls—is shared national membership. This view can be understood (but does not have to be) as a way of interpreting and developing the central Rawlsian claim that the rights and obligations of distributive justice arise only when people stand in certain normative relations to each other within a state. A third interpretation of Rawls identifies the basic structure with coercive institutions. Blake (2002), for instance, argues that the obligations and demands of distributive justice arise because state coercion requires justification; the corollary is that when there is no state coercion, there is no need for this justification, and consequently the obligations and demands of distributive justice do not arise. Another proponent of the coercion view is Nagel (2005).[14] For Nagel, "justice is something we owe through our shared institutions only to those with whom we stand in a strong political relation. It is, in the standard terminology, an associative obligation" (p. 121). The strong political relation Nagel identifies as relevant is that of sharing a basic structure, its key feature being that it is comprised of coercive institutions that people have no choice about

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[12] Another seminal work of Rawlsian cosmopolitanism is Pogge (1989).

[13] As we saw in the previous sections, this has also been a very important issue in the context of domestic justice. It is fair to say that some of the motivation for this work is owed precisely to the importance of the issue for discussions of global justice.

[14] His arguments are not entirely clear, nor is it entirely clear why his paper has had the influence it has had, but nonetheless, it has, and it will therefore be necessary to sketch his position a little.

joining. The major difference between Blake and Nagel comes in the conclusions each draws. For Blake (2002), a shared set of coercive institutions justifies the claim that "liberalism can consistently limit its concern for relative deprivation to the domestic arena, and be concerned only with absolute deprivation in the international arena" (p. 259). That is, Blake thinks principles of justice do apply globally, but that a further, more stringent set of principles applies domestically. Nagel, however, concludes that no principles of justice apply globally. This is because the only people entitled to demand the uniquely high justificatory standards required of sovereign states are members of that state, as it is only the members who are required to actively comply with the coercive demands of the state. Further, the only people who have to respond to these demands are also the members, because it is only the members who are responsible for the system that makes these coercive demands. From this it is but a short step to the claim that global institutions are neither (a) involuntary nor (b) coercive in the same way, and therefore the demand and responsibility for justification that constitute the ground and determine the content of "the positive obligations of justice," simply do not arise. So for instance, in Nagel's view, while we have duties to alleviate world poverty, they are to be understood as humanitarian duties rather than duties of justice.

The most straightforward empirical counter to this view is to object that the global order is indeed an instance of a coercive structure, or at least sufficiently so to make principles of global distributive justice applicable to it (see e.g., Cohen & Sabel, 2006). A different objection is to argue that even if Nagel is correct in claiming that the state is coercive in a special way, it does not follow that no requirements of justice apply at the global level (Julius, 2006). A third development is to argue that even if there is no global basic structure, there may, under certain conditions, be a duty of justice to create one—this being an interpretation of Rawls's "natural duty of justice" (see Sect. 2.2) (see Beitz, 1983, p. 595, and more recently Ronzoni, 2009). This last position is interestingly similar to Rawls's own view on international justice, even though Rawls's

normative interpretation of international relations is non-cosmopolitan: for Rawls the appropriate subject matter for international justice is relations between societies ("peoples," in his terminology) rather than between the individual members of a society. The relevant agents are societies, and principles of justice for the international order apply to relations between societies, not relations between individual persons qua individuals (Rawls, 1999b, § 4). This claim has been one of the central issues in the discussion: who or what is the relevant agent in the global context? What, if anything, is the normative significance of states? Rawls's theory of international justice is a prominent example of the views which argue that the relevant collective agent—nations, or states, or communities of a certain kind—possesses a normative significance that can play out in different ways.[15] As noted above, the cosmopolitan view is that membership of a state is irrelevant when it comes to justice (see Pogge, 1989, p. 247). Cosmopolitanism has been further linked with global egalitarianism, namely, the view that there is a set of egalitarian principles of distributive justice which is the same (in content and weight) both within and beyond states. This last link is not theoretically necessary—strictly speaking, one could be cosmopolitan by holding that *no* principles of justice apply both within and beyond states—and a recent development in the field has been the development of globally egalitarian theories of justice which nonetheless think that the state, and being a member of it, is normatively relevant in terms of whether, which, and how principles of justice apply (see Risse, 2012; Ypi, 2011).

However, Rawls also gives importance to the establishment of a just basic structure: he claims that well-off liberal societies can have an obligation that is expressed in terms of contributing to establishing a basic structure. He calls this "the duty of assistance," and his claim is that "well-ordered people have a *duty* to assist burdened societies" (Rawls, 1999b, p. 106). The aim of this duty "is to realize and preserve just (or decent)

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[15] Other prominent examples are Tamir (1993), Miller (1995), Walzer (1983).

institutions" (Rawls, 1999b, p. 107). For the non-cosmopolitan Rawls, this realization or preservation refers to the just or decent institutions within and of a particular society, rather than to putative global institutions—what is important is that something like a just (or decent) basic structure is securely established within each society, and well-off societies can have a duty to help other societies bringing this about. Rawls suggests that this duty of assistance is analogous to the duty he proposes regarding intergenerational justice, namely the duty of just savings (Rawls, 1999b, pp. 106–107) (see Sect. 2.5 below).

Now, Rawls's work did indeed shape and continues to shape the debate, but it has been suggested that the field is now moving beyond it (Blake & Smith, 2013). In later work, Pogge can be understood as arguing that the debate on the basic structure misses the point when it comes to global justice. Rather, it is a simple matter of responsibility for causing avoidable harm—global institutions cause world poverty, and so people have a responsibility not to participate in or support such institutions (Pogge, 2008). This argument does not have to rely on claiming that the institutions in question together comprise a global basic structure. Another important example outlined by Blake and Smith (2013) is the attempt to ground obligations of distributive justice in non-associative ways; i.e., to simply deny the Rawlsian claim that a shared basic structure is a necessary condition for justice to apply. Barry (1989, pp. 183–189) and more recently, e.g., Caney (2005) argue that obligations of global distributive justice do not arise or depend on interactions between people. Rather, we should appeal to intuitions of impartial considerations and treatment as equals that we find in a different part of Rawls's theory, namely the claim that arbitrary inequalities of any kind are unjust.

2.5 Extending Justice in Time: Intergenerational Justice

Today the question of what we owe future people (and of how currently living people ought to go about fulfilling their intergenerational duties) has become a pressing international issue. The consensus of scientific opinion is not only that the observed warming of the globe over the past 50 years is caused by human actions (see e.g., Cook et al., 2013) but also that the in-principle avoidable anthropogenic climate change imposes heavy risks on future people by significantly increasing the likelihood of very many future people's basic human rights being violated (see e.g., Caney, 2010).

Rawls (first in Rawls, 1971, and in 1999a, especially § 44; Rawls, 1993, p. 274; Rawls, 2001, especially §§ 49.2 and 3) suggests an ingenious way of extending the scope of his conception of distributive justice to the relations between generations. Rawls proposes a principle of "just savings." A society "saves," as Rawls understands it in the intergenerational context, when the society undertakes actions that make later generations better off at the expense of earlier generations. For Rawls the value that counts is people's ability to maintain a just society. Savings concern all actions necessary to maintain a just society, the long-term investments in infrastructure, the transfer of capital as well as "knowledge and culture" and "techniques and skills" (Rawls, 1999a, 1999b, p. 256). Mitigation measures would also clearly count as Rawlsian "savings," even though Rawls does not even mention the reduction of pollution in his discussion of the savings principle.

Rawls presents the just savings principle as the outcome of a decision reached in the contract-theoretical (hypothetical and nonhistorical) decision-situation of the original position. Certain non-contingent features of the relations between non-contemporaries present a challenge for a theory of intergenerational justice. Indeed, the question of justice as Rawls understands it does not arise: We cannot cooperate with past and future non-contemporaries and, while previous generations can benefit or harm us as we can benefit or harm future people, we cannot benefit or harm previous generations and future non-contemporaries will not be in a position to benefit or harm us (Rawls, 1971, § 22). Rawls responds by abstracting from these features and adjusting the interpretation of the original position for the

intergenerational context (Rawls, 1993, p. 274; Rawls, 2001, § 25.2). Instead of knowing that they exist today (the "present-time of entry" interpretation), the contractors know that they belong to one generation, but they do not know to which particular generation they belong. From behind this "veil of ignorance" they determine a just savings rate.

The contractors must distinguish two stages of societal development. In the accumulation stage future people will reach "the conditions needed to establish and to preserve a just basic structure over time" (Rawls, 2001, p. 159) only if currently living people will save for them. Rawls holds that they have reason based on their natural duty to justice to do so in that stage. Once just institutions are securely established—this is known as the steady-state stage—justice does not require people to save for future people. Rather they should refrain from acting in ways that would not allow future people to continue to live under just institutions. Rawls also holds that, in that second stage, people ought to leave their descendants at least the equivalent of what they received from the previous generation (see Gosseries, 2001 for a comparative assessment of Rawls's substantive principle). This additional claim can be supported by the idea of a presumption in favor of equality (Sidgwick, 1981, pp. 379–380) and by non-justice-based ethical considerations as delineated below.

Contractors cannot know whether previous generations have saved for them. Why then should they agree to save for future generations? Practically speaking, this is a major issue. When it comes to preserving the natural conditions that will allow future people to live under conditions of justice, most justice theorists today argue that the previous and current generations have not saved enough in terms of mitigating the global consequences of anthropogenic climate change or enabling future people to adapt to the non-avoidable consequences of climate change (see e.g., Shue, 1999; Meyer, 2013). However, Rawls does not address the problem, or at least not in a direct way. He understands previous generations' noncompliance with a just savings principle as a problem of non-ideal theory (Rawls, 1993,

p. 274, fn. 12). The original position, however, belongs to ideal theory: strict compliance with whatever principles are agreed on is assumed (Rawls, 1971, pp. 144–145). Rawls introduces problems of partial compliance and noncompliance only at the level of non-ideal theory (Rawls, 1971, Chapter iv). In accordance with this understanding of ideal theory, Rawls assumes that the generations are mutually disinterested. He takes the contractors to agree to a savings principle "subject to the further condition that they must want all previous generations to have followed it." Rawls continues: "Thus the correct principle is that which the members of any generation (and so all generations) would adopt as the one their generation is to follow and as the principle they would want preceding generations to have followed (and later generations to follow), no matter how far back (or forward) in time" (Rawls, 1993, p. 274; Rawls, 2001, p. 160). The principle of just savings thus agreed on is thought to be binding for all previous and future generation. As Rawls never addressed the question of how we should respond to the impact of past generations' not having saved at just rates it remains unclear how his savings principle can determine what currently living people owe future people as a matter of justice (Dasgupta, 1994, pp. 107–108).

There are a number of principled objections to Rawls's strategy of abstracting from the special features of intergenerational relations to extend justice considerations intergenerationally (see e.g., Heyd, 2009a). The objection is that these features mean that the circumstances of justice do not obtain intergenerationally, and therefore considerations of justice are inapplicable to intergenerational relations. Theorists appeal to, for example, the current nonexistence of future people (De George, 1981, p. 161), the inability of future non-contemporaries to enforce or waive their claims against currently living people (Steiner, 1994, pp. 259–261), and the impossibility of reciprocity between non-contemporaries (Heyd, 2009a). Furthermore, currently living people cannot have particular knowledge of future people as individuals (Cowen & Parfit, 1992, p. 148). Rawls apparently considers these features of intergenerational relations irrelevant for the

validity and applicability of justice considerations (as does, e.g., Barry, 1977, 1995): we ought to abstract from these features on the principled ground that they are irrelevant for the moral status of future people as free and equal persons. Given this moral status, currently living people are required to relate morally to them as fellow humans; future people will be bearers of rights or legitimate claims in the future; the legitimate claims they have will be determined by the interests they have then; currently living people's actions and policies can severely frustrate basic interests of future people; if they act in such ways when they can avoid doing so and at reasonable costs to themselves, they violate future people's legitimate claims; therefore, currently living people stand under the obligation to protect the basic interests of future people, and this obligation does not depend on the particular identity of future persons (see also Hoerster, 1991, pp. 98–102).

This may seem plausible, but in his brief discussions of intergenerational justice, Rawls bracketed the "non-identity problem" that, among others, Parfit discovered[16] and investigated in his seminal work (Parfit, 1976, 1982, 1984, part IV). The non-identity problem challenges the very possibility of currently living people affecting the interests of future persons, that is, the very possibility of harming or benefitting them, and is widely seen as the most serious challenge to extending justice considerations to intergenerational relations.

Assume that continuing with business-as-usual in climate protection is an example of a policy that clearly violates Rawls's savings principle because the policy will predictably violate the justice claims of future people vis-à-vis the currently living by seriously undermining future people's chances of preserving (or establishing) a just basic structure. The non-identity problem challenges the possibility of criticizing the policy on these grounds: If the currently living people fulfil their justice obligations vis-à-vis future

generations, they will pursue policies that will non-intentionally change who will procreate and when. These policies will therefore bring into existence different people, compared to the people who would have existed under business-as-usual. But if not continuing with business-as-usual would have resulted in the allegedly harmed person not coming into existence, consequently that person cannot be said to have been harmed by continuing with business-as-usual. This reflects a common understanding of harm according to which an action harms a person only if the action causes this person to be worse off than that person would have been had the agent acted otherwise. This counterfactual notion of harm makes no sense with respect to persons whose existence depends upon the allegedly harming action, because they cannot be worse off owing to this action than they would have been had this action not been carried out. For in that case, they would not have existed. The challenge is that this seems to exclude the possibility of our harming future people when we choose among long-term policies with significantly differing consequences for the quality of life of future people, because without the policy the allegedly harmed people would not have existed.

One way of meeting this challenge is to argue that harming a person can be understood differently and in a way that is unaffected by the non-identity-problem (see Meyer, 2003, pp. 147–149; pp. 155–158, for a detailed discussion. For other responses see Schwartz, 1978; Kavka, 1982; Roberts, 1998; Kumar, 2003; and especially Heyd, 2009b, 2014). According to the "threshold notion of harm" an action harms a person only if, as a consequence of that action, the (then existing) person falls below a normatively defined threshold (see Shiffrin, 1999; McMahan, 1998, pp. 223–229; Meyer 2015, sect. 4). On this notion, finding that a person was harmed does not require that this person would be in a better state had the agent acted otherwise. Thus, future people can be said to be harmed by currently living people's actions even if these actions are among the necessary conditions of their very existence as the individuals they will be, if those actions cause them to fall below the threshold.

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[16] Schwartz (1978) discovered the problem at about the same time. Parfit and Heyd (1992, 2009) have done the most in explaining and investigating the problem's conceptual and normative significance.

Consequently, presently living people can be said to stand under the duty to consider legitimate justice claims of future people vis-à-vis them in choosing among long-term policies if such policies result in them being in a subthreshold state. Whether and when this is the case depends upon how the threshold is substantially defined. Rawls's principle of just savings can be understood as a plausible substantive specification of the intergenerational threshold; this interpretation is also a plausible defence of Rawls's bracketing of the non-identity problem.

In addition to the limitations described above, Rawls's discussion of intergenerational justice is also limited in his not directly addressing the question of whether and how the just savings principle might be sensitive to the number of people who will live in the future. This number of future people seems clearly relevant for determining whether and how much currently living should save (see Heyd, 1992, p. 47; Dasgupta, 1994; Casal & Williams, 1995, 2004; Barry, 1999, pp. 107–111; Gosseries, 2001, pp. 330–333). However, the just savings principle could indirectly be sensitive to the number of future people: it would at the very least be unjust to choose those further futures in which more people exist than there are resources for just institutions. Consequently, future people's legitimate claims to living under conditions of justice and currently living people's corresponding duties of justice would set a normative framework for decisions concerning future people, including those that have an impact on their number and identity.

However, such a framework does not provide a complete moral theory of intergenerational relations. There are concerns for future people shared by many of us that cannot be accounted for by justice-based considerations, e.g., currently living people's commitment to certain traditions of collective self-understanding and to transgenerational projects whose goals and values can only be realized when future people will want to and be able to continue them (De-Shalit, 1995, Chapter 1; Meyer, 2005, Chapters IV and V). First, many of us believe that it is important that there be future people at all. Consider Jonas's

(1984) famous principle of responsibility: "Act so that the effects of your action are compatible with the permanence of genuine human life" (p. 11). Arguably, theories of justice cannot ground a duty to future people that we bring them into existence even if all of them had extremely good conditions of life (Heyd, 1992; Meyer, 1997; Sanklecha, 2013); they must simply presuppose that future people will exist. Second, many of us believe that future people should have a life that is well above the level of well-being specified by their legitimate justice claims vis-à-vis currently living people. This, in part, reflects a third concern many have: Future people should be able to share (at least certain aspects of) the particular way of life of currently living people. But, presumably, currently living people do not violate the future people's legitimate justice claims by failing to sustain their way of life for them. Thus, we cannot prefer a future with people all of whom have lives far above the level of what intergenerational justice requires to a future with no people on the basis of considerations of rights of future people. What is needed here, and what theories of justice simply lack the conceptual resources to provide, is an account of why there should be future people at all (see Heyd, 1992; Jonas, 1984; Meyer, 1997). Further, as discussed above, we also need an account of how many future people there ought to be, because the number of future people we assume will exist is highly influential in determining what we ought to do now so as to not violate the rights they have against us. This too is not a question that theories of justice—at least as they currently are—are well suited to address.

In summary, we may put it like this: Theories of intergenerational justice, like all other moral theories, contain certain presuppositions they cannot justify (for a more general discussion of the limits of rights-based moralities see Raz, 1986, Chapter 8). As such, there is no principled problem with making the necessary presuppositions. However, in the case of intergenerational justice, the presuppositions concerned with the existence, number, and identity of future people are (a) in principle under human control, i.e., it is in principle possible for currently living people to

decide whether and how many future people there will be, and (b) significant for determining what currently living people must sacrifice now in order to discharge their duties of justice toward future people. Consequently, the presuppositions of existence, number, and identity must themselves be ethically justified, and this justification cannot be purely a matter of justice. The logic of intergenerational justice itself demands a move beyond considerations of justice.

2.6 Conclusion

In this chapter, we have focused on the tradition of "analytic" liberal contractarianism, for which justice is the key concept of political philosophy (see Cudd, 2013). Apart from Rawls, other influential contractarians of the twentieth century include Buchanan (1975) and Gauthier (1986) who reconstruct a Hobbesian version of contract theory, and the Lockean version reconstructed by Nozick (1974). By no means is this the only important tradition, however, and we want to briefly mention important alternatives. Wolff (2013), for example, suggests that "a broad distinction can be seen in that there is a line of intellectual tradition that runs from John Stuart Mill and another from Hegel" (p. 813). In neither of these traditions is justice the key concept of political philosophy. In the Millian tradition, liberty and well-being are the key concepts (see Griffin, 1986; Broome, 2004; and the liberal perfectionism of Raz, 1986; Green, 1988). In a prominent line of the Hegelian tradition, recognition is the key concept of political philosophy (see Honneth, 1992; Honneth & Fraser, 2003). Among the most important critics of Rawls's understanding of political philosophy are the so-called communitarians (MacIntyre, 1984; Sandel, 1998; Taylor, 1985; Walzer, 1983) who, relying on insights of Hegel (and Aristotle), argue for the importance of tradition and social context for moral and political reasoning, and put forward normative claims about the value of community as well as ontological claims about the social nature of the "self" (Bell, 1993; Mulhall & Swift, 1996). In doing so they mean to dispute Rawls's claim that political

philosophy's primary goal is to explicate principles of justice that govern the fair cooperative venture between free and equal persons in which individuals pursue their conceptions of the good life. Another important alternative to the Rawlsian focus has been provided by the feminist critique of both Rawls in particular and liberalism in general. Young criticizes the focus on distributive justice (Young, 1990), arguing that this obscures crucial issues of domination and oppression, and also argues that liberal political theory in the broadly Rawlsian tradition does not sufficiently take the perspectives and interests of marginalized groups into account (Young, 1990). Another feminist critique, different in content but similar in that it also challenges fundamental premises of the Rawlsian tradition (such as the centrality of justice), has been the idea of care ethics (see Held, 1993, 2006).

Our chapter, in other words, has a restricted scope. With this limitation established, we now conclude by identifying some questions and areas of research that we believe are (or should be) central in the tradition we have focused on. Rather than simply listing each issue, we will do so by stating a simple question and analyzing what is required to answer it.

Suppose that we come to the conclusion that some set of principles of domestic, international, and intergenerational justice is valid and that the world in which we live is less-than-just (and possibly extremely unjust in many respects). The first formulation of the simple—and practically very important—question is: what duties, if any, does an individual agent have with respect to contributing to bringing about a more just world? One context in which this question arises is what many consider the most pressing global environmental problem: What duties can an individual be thought to have in contributing to a solution to climate change? This is the context we focus on, not only because of its importance, but also because the problem of responding to climate change is a particularly clear example of a question that involves the issue of extending justice in space and time. It involves extensions in space because any adequate solution will have to involve more than one nation state, and so it is important to ask what a just global

distribution of the benefits and burdens of responding to climate change would be. It involves extensions in time because one prominent way of understanding what an adequate response would be in the first place takes as one of its starting-points, the idea that considerations of intergenerational justice contribute to specifying what we owe future generations in terms of, inter alia, limiting global emissions.[17]

One issue central to answering the question is the following. Let us accept what is (to us) uncontroversial: the current situation with respect to climate change is unjust. In Rawlsian terms, we could say that the institutions required to deal with the problem are either not in place, or are not just; in other words, the situation is "non-ideal."[18] A key research focus for political philosophy is, and ought to continue to be, the task of developing a shared understanding of the relevance of non-ideal circumstances for theorizing about justice and about individuals' duties to contribute to bringing it about. For example, when we try to work out what duties individuals currently have with respect to climate change, what is the relevance of the fact that each individual can expect that (in absence of a coercive collective situation) many or even most others will not discharge those duties? In such a situation, should one "take up the slack" and do more than one would have to do if all others did their share (Singer, 1972; Unger, 1996)? Or is that unfair, and is one only obliged to do what one would have had to do if all others also discharged their duties (Murphy, 2000)?[19]

Another important aspect of this issue, which is directly methodological but has significant substantive implications, is the question of whether ideal theory is useful at all in understanding what we ought to do in non-ideal situations. As outlined above, Rawls's view was that ideal theorizing contributes by specifying the ultimate aim (in terms of justice) of institutional and individual action under non-ideal circumstances and by providing a standard of justice by which to judge existing circumstances. Ideal theory tells us where we want to get, non-ideal theory tells us how to get there. But it has been argued that ideal theory is irrelevant to determining what to do under current circumstances. Prominently, Sen (2009) argues that in order to know how to act in existing circumstances all we need is to be able to make comparative judgments about justice, and this comparison does not rely on an ideal (pp. 1–18; 96–105). Others have argued that ideal theory leads us astray under non-ideal circumstances because of the problem of the second-best, that is, the problem that when you cannot realize all elements of a complex ideal, the second-best solution may not straightforwardly be to realize as many of the elements as you can (see e.g., Margalit, 1983). The theoretically extreme end of this critique leads to a complete rejection of the relevance of ideal theorizing about justice (Farelly, 2007; for an account of the other extreme, i.e., one which rejects the relevance of non-ideal theorizing to discovering what justice requires, see Cohen, 2008).

A third important issue is the one raised at the end of Sect. 2.5, on the limits of justice. As we have said, the work of John Rawls has revived and dominated one particular tradition within political philosophy. One of the results of this has been that theorizing about justice has been central within that tradition over the last four decades. But, as explained above, there are foundational issues in the morality of intergenerational relations that simply cannot be dealt with by theories of justice (Meyer, 1997; Sanklecha, 2013). Given the changed conditions of human action (Heyd, 1992; Jonas, 1984), and the practical urgency of responding adequately to climate change, it is crucial to address those issues. The place they have begun being addressed is in discussions of

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[17] Precisely because we think it is both important and interesting, we have worked on several different normative and ethical aspects of the problem of climate change. See for example, Meyer (2013), Meyer and Roser (2006, 2009, 2010), Meyer and Sanklecha (2011, 2014), Sanklecha (2013).

[18] There are many different understandings of what it is for a situation to be non-ideal; the classical contemporary formulation is found by Rawls, but since then there have been many different accounts. See Rawls (1999a, 2001), Murphy (2000), Buchanan (2004), Sen (2009), Simmons (2010), Meyer and Sanklecha (2009, 2011).

[19] For discussions of the problem of individual duties in non-ideal circumstances in the specific context of climate change, see e.g., Banks (2013), Hiller (2011), Johnson (2003), Maltais (2013), Meyer and Sanklecha (2011, 2014), Nolt (2011), Sandberg (2011), Schwenkenbecher (2014).

climate change and population policies (Broome, 2005, 2012, especially pp. 169–186; Cafaro, 2010; Casal & Williams, 1995, 2004; Heyward, 2012), but these discussions have mostly, in our view, shied away from the question that is theoretically the most basic: should there be future people? It is important, for reasons already given, that more work begins to address this basic question. A recent effort in investigating the value to currently living people of the continuation of (certain sorts of) human life is Scheffler (2013). His work, however, does not engage with an ongoing debate on these issues. In our view, engaging with this debate is a promising research direction. In particular here we think Jonas (1984) and Heyd (1992) have made important contributions (see, also, De-Shalit, 1995; Meyer, 1997; Partridge, 1981; Sanklecha, 2013; Thompson, 2009).

Another issue arises if we believe—as many do—that an individual can legitimately pursue other interests; i.e., her life does not have to be solely about contributing to bringing about a just solution to climate change. Indeed, this appears virtually trivial, but it has deep implications. Simply put, once one accepts that an individual can legitimately have a plurality of interests, one opens the door to potential conflict between those interests (see e.g., Nagel, 1991). If we further believe—as many also do—that at least some of this conflict is to be understood as conflict between a plurality of values, then we have a serious issue. How are we to weigh different values? Can we? (see e.g., Broome, 1991, 2004; Temkin, 2012) Cohen, for instance, as quoted in Swift (2008), says that "philosophers, and, for that matter, non-philosophers, do not know how to compute, in general terms, the comparative weights of the values all of which deserve consideration: no one knows how to draw an 'indifference curve' map of those values. But philosophers are sometimes better than others at identifying distinct and neglected values that are worth considering. We often have something novel to say about what ingredients should go into the cake even when we can say nothing about the proportions in which they are to be combined, not because that isn't important, but because the

problem simply doesn't yield to general recipe-making. Philosophers sometimes end their articles by saying this sort of thing: it is a task for future work to determine the weight of the consideration that I have exposed. But nobody ever gets around to that further work. They wish they could, but they can't" (p. 369). Swift himself is more optimistic, stating his belief that philosophers can and are doing more than this. Rawls, for instance, specifies priority rules for his principles of justice, which is certainly a way of indicating the relative weights of different considerations of justice—but the question is whether such specifications can be justified by argument, and to what extent (Feinberg, 1973, pp. 68–83; Thomson, 1986, pp. 33–48; Wellman, 1995; Birnbacher, 2007, pp. 158–172).

The issue of how to understand, analyze, and practically respond to value plurality and value conflict (see e.g., Berlin, 1969, 1991; Chang, 1997; Griffin, 1986; Kekes, 1993; Stocker, 1990; Raz, 1999) is immanent in our entire essay. In a sense, what we have described is a history of disagreement and discord. To stick to the question of this conclusion—there is and will be disagreement between intelligent, informed, and sincere people about what duties an individual has with respect to bringing about a solution to climate change (for discussions of reasonable disagreement and in particular its implications for political morality, see Rawls, 1993; McMahon, 2009). History and our lives demonstrate that such disagreement is not going away. Nevertheless, we can sometimes be in circumstances—for example climate change—in which we still have to act, and where not acting is also a form of action. When it comes to the political arena, the problem is further complicated by the fact that the action involves a collective of individuals, each with some presumptive right to autonomy. A crucial issue for political philosophy is trying to figure out just or even minimally morally acceptable ways of coming to collective decisions in such situations. A standard move is to turn to procedure (see e.g., Gutmann & Thompson, 1996, 2004; Hinsch, 2010; Meyer & Sanklecha, 2014). In our view it is important to investigate whether

and, if so, how it is possible to agree on a procedure while disagreeing about substantive conceptions of the good (Hinsch, 2010, 2011; Waldron, 1999).

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Sociology of Justice

3

Stefan Liebig and Carsten Sauer

3.1 Introduction

For a long time, justice has been treated solely as a normative problem. (For the philosophical perspective on justice, see Meyer & Sanklecha, 2016, Chap. 2 of this handbook). It was primarily the task of philosophers to think about the meaning and importance of justice and to identify the norms and principles that would help to realize it. Although philosophers are still not in agreement as to which rules and principles can promote justice in a group, an organization, or a society, they more or less agree on three basic formal criteria that constitute a state of justice (Koller, 1995): (1) equal treatment, that is, individuals should be treated equally under the same relevant conditions; (2) impartiality, that is, to act in situations of interpersonal conflict of interest according to rules which are acceptable to all parties from an impartial point of view; and (3) consideration of legitimate claims, that is, individuals should be treated according to what they deserve. That justice should prevail is seen as a moral imperative, based on the modern idea that all human beings are born free and equal and have the same rights and obligations. Deciding which principles and rules are necessary to ensure that the allocation and distribution of benefits and burdens can actually be called "just" has been the subject of philosophical disputes dating back to Aristotle.

Since the middle of the last century, empirical research on justice has become established within the domains of the social and behavioral sciences. In contrast to the normative disciplines, the empirical sciences focus on describing phenomena that are observable in our world and on developing theories to explain them. In this sense, empirical research on justice deals solely with empirical phenomena, concentrating on the empirical validity of conceptions of justice for individuals' attitudes and behavior and for the structure and processes of society or other forms of social aggregation (e.g., groups or organizations). Thus, the reason for studying justice from the perspective of the social sciences is not to assess its normative importance but to determine its empirical relevance for individuals and societies. Three basic questions guide this research:

1. Why is justice regarded as a desirable state in almost all societies?
2. What ideas or conceptions relate to justice?
3. How do conceptions of justice shape the individual and life in society, and vice versa?

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Sociology's concern with describing and explaining collective phenomena is a consequence of the division of labor within the social sciences. Its priority is to analyze the society (either as a whole or as smaller social aggregates) and related social phenomena (Wippler & Lindenberg, 1987). Justice can be seen as one such social or collective phenomenon in at least four respects:

Societal conditions. History shows that issues of justice have not been addressed consistently or in the same way by all societies. In most cases, structural and political changes prompt a quest for justice. For example, Moore (1978) showed that in Germany in the late nineteenth century, industrialization, regional mobility, and increasing social inequalities contributed to a growing sense of injustice among the working classes. Whether or not issues of justice are publicly discussed depends on societal conditions. Miller (1979, 1999) argues that what is regarded as just in a substantial sense varies according to the basic structure of a society: "Men hold conceptions of social justice as part of more general views of society, and…they acquire these views through their experience of living in actual societies with definite structures and embodying particular kinds of interpersonal relationship" (Miller, 1979, p. 342).

Institutional design of a society. Modern welfare states have established various institutions for allocating and distributing societal goods and burdens. Tax systems and welfare institutions, for example, reallocate income and wealth. Normative ideas about who should get what and who should bear what burdens are translated into social reality. Hence, the existing institutional design of a society and the rules and practices within these institutions reflect conceptions of justice at the collective or societal level.

Social conditionality. What is regarded as just in a society depends on the conceptions of justice held by each member of that society. Empirical research has revealed consensual structures, meaning that individuals with common traits, the same social background, and similar experiences over their lifespan tend to have the same conception of justice. Accordingly, their social conditions affect their attitudes toward justice. This social conditionality establishes justice as a collective phenomenon (Boudon, 1998)—groups of individuals share the same attitudes.

Social consequences of (*in*)*justice*. Since its beginning, justice research has concerned itself with the behavioral consequences of the sense of (in)justice. A broad range of empirical results have shown that experiences of (in)justice affect attitudes and behavior and thereby lead to *social consequences* that can affect the functioning of organizations, institutions, and society as a whole (Hegtvedt & Isom, 2014).

Like researchers in other empirical disciplines, sociologists study justice from the standpoint of "a-morality" (see Luhmann, 1996)—they do not claim to know which conception of justice is right or true. As observers, they examine the empirical reality connected to conceptions of justice on the level of societies or other forms of social aggregation. Their tasks are to *describe* existing concepts of justice in a society and to *explain* why such concepts exist, as well as to determine the related social consequences. Given the analytical primacy on the level of social or collective phenomena, three assumptions are fundamental:

1. Justice is a social phenomenon that can be conceptualized as a *social value* in the sense of shared "conceptions of the desirable" (see van Deth & Scarbrough, 1995, p. 28), describing how resources and burdens should be allocated or distributed within a social aggregate.
2. Justice is *socially determined* because whether something is regarded as just depends on the social structures and processes of a society or other social aggregates.
3. Justice is a *social force* because it affects the economic, political, and social structures and processes within social aggregates.

Thus, the first task of sociological justice research is to describe a society's conception and understanding of justice. The question, then, is how and where different manifestations of justice can be identified. In contrast to psychology, sociology cannot rely simply on attitude research or behavioral research; it must also consider other manifestations, such as in the structure and rules of societal institutions or in political debates and other societal discourses. The second task is to identify the social conditions (e.g., structure, culture, institutions) that affect these conceptions of justice on various levels of social aggregation and on the level of the individual (Wippler & Lindenberg, 1987, p. 135). The third task is to study the consequences of justice-motivated behavior exhibited by collective or corporate actors (interest groups, political parties, organizations) and by natural persons in terms of the structures and processes within a society.

In this chapter, we provide an overview of the existing empirical justice research in the field of sociology, in the hopes of contributing to a better understanding of what constitutes a sociological approach to the issue. We will begin by introducing the multilevel model of sociological explanation from which we have derived four perspectives of sociological justice research: the analysis of *institutions* and *discourses* on the societal level and the analysis of *attitudes* and *behavior* on the individual level. Because sociological attitude research offers the most advanced theories and the largest body of empirical evidence, we will focus on such research and report its central theoretical developments and main empirical results. We restrict our review to what is usually called "distributive justice," that is, conceptions of justice that are related to the allocation and distribution of goods (primarily income and wealth) and of burdens (e.g., taxes or welfare payments).[1]

3.2   Justice as a Multilevel Problem: Four Areas of Sociological Justice Research

In addition to identifying and describing the conceptions of justice—i.e., the various manifestations of conceptions of how goods and burdens should be allocated in a society as a whole and within other forms of social aggregation—sociological justice research, like other scientific disciplines, seeks to provide explanations that are guided by theories and can be proved empirically. These explanations are related to three basic questions, or "why problems" (Bunge, 1998, p. 3): Why do conceptions of justice in a social aggregate exist; why do they vary in time and space; and why are other societal phenomena affected by collective or individual justice concerns? Answers to such questions take the logical form "*q* is because of *p*," where *q* is the *explanandum* (in our case, justice conceptions in a social aggregate) and *p* denotes the reason for the existence of *q* (*explanans*). When sociological research tries to identify social determinants of *q*, *p* refers to some structural or process-related properties of a social aggregate. In other words, *q* is the outcome of certain social conditions (*sc*), or, in more general terms, $q = f(sc)$. Treating *q* as the outcome of *sc* implies the assumption of a causal relationship between the two components in the form of $sc \rightarrow q$. Studies of the consequences of justice are based on the same logic. In this case, *q* represents some social phenomenon (*explanandum*) that is affected by justice conceptions or considerations—e.g., the level of trust in a society (Tyler, 2001), political participation (Mühleck, 2009), or the rate of employee theft in companies (Greenberg, 1990)—and *p* represents the determinants (*explanans*). Justice (*j*) is then one of these factors affecting a certain outcome: $q = f(p, j)$.

When sociological justice research tries to identify and empirically prove these causal relationships at a societal or macrolevel, it faces at least three methodological problems. The first is what is known as the "*small N*" problem (Kittel,

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[1] For comprehensive overviews that also include procedural and interactional justice concerns, see Hegtvedt and Isom (2014), Hegtvedt (2006), Arts and van der Veen (1992), Cohen (1986).

2006). In order to show that structural conditions within a society determine some type of shared justice conception, one would require data on the societal level that can be used for either a comparison of different societies or a depiction of how structural changes in a society also lead to changes in shared justice conceptions over time. In both cases, the number of societies or observations would be limited, so the significance of any statistical analysis, if any, would be negligible.

The second problem related to the macrolevel approach is *overdetermination* (Mayntz, 2002). Social phenomena are usually affected by more than one determinant and are the result of intertwined developments; therefore, it is often difficult to single out the affecting factors. For example, a change in a shared justice conception can be the result of a change in the composition of a society's population (due to immigration or demographic changes), changing economic inequalities, or political decisions that may themselves be the outcome of shared justice conceptions.

The latter brings us to the third problem, that of identifying the *direction of causation*. If we observe a correlation between the structural conditions of a society and the pattern of shared justice attitudes, we do not know from that single correlation which of the two is affecting the other. This problem is exemplified by the famous comment by Max Weber that the Protestant ethic was a driving force for the development of capitalism in Western societies. Coleman (1990) showed that relying on observations at the societal level alone makes it impossible to test causality and its direction. Such testing is possible only by asking individuals whether economic behavior is affected by their religious values and, if so, how.

One way to avoid these methodological constraints is to conceptualize sociological justice research as a multilevel problem, that is, to go "down" from the level of social aggregates to the level of individuals. The idea "that we must reduce all collective phenomena to the actions, interactions, aims, hopes, and thoughts, of individuals" (Popper, 1949, p. 88) is rooted in the thinking of John Stuart Mill and later became prominent in the field of economics with the

work of Schumpeter (1908), eventually finding its way into contemporary sociology in Coleman's (1990) work. Contrary to the version of methodological individualism that dominates economic thinking, the "structural individualism" in sociological terms treats collective phenomena such as social institutions, social relationships, and social structures not only as the *explanandum* but also as the *explanans* (Wan, 2012). Structural individualism assumes that not only individual behavior and choices but also individual preferences depend on the past and present structural conditions that constitute the social context of an individual. By attributing substantial explanatory importance to the social structures in which individuals are embedded (Granovetter, 1985), sociological research can dispel the assumption found in economic theory that preferences are a given and stable (Stigler & Becker, 1977) and can assume that beliefs and attitudes are functions of the social situation.

Thus, the central question for justice research is how do individuals acquire their justice attitudes? According to the second assumption posed above, these attitudes are the result of the social conditions of the individual over a lifetime. These conditions comprise social structures (e.g., distribution of income in a society, institutional order, economic order, social relationships), social norms and values, and social processes and dynamics. On the other hand, "structural individualism" treats social structures and, more generally, all social phenomena as the result of aggregated individual behavior. Justice concerns of individuals may affect a society's political structures (through voting behavior or political protest) or other structural characteristics. Therefore, explaining the social determination of social phenomena requires three steps: first, showing how an individual's situation, preferences, beliefs, and attitudes (at the microlevel) are affected by the social structure at the macrolevel (macro → micro); second, identifying which individual behavior results from that situation (micro → micro); and third, showing how the behavior exhibited by members of a social aggregate constitutes a collective or social phenomenon (micro → macro) (see Figs. 3.1 and 3.2).

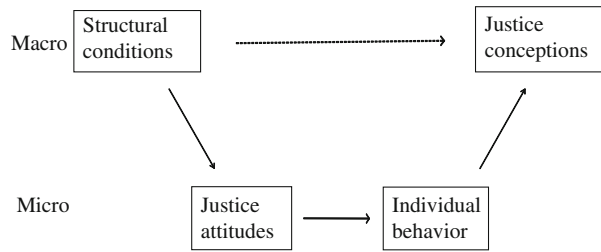**Fig. 3.1** Justice as a socially determined collective phenomenon (Assumptions 1 and 2)

Macro: Structural conditions ⤍ Justice conceptions

Micro: Justice attitudes → Individual behavior

Fig. 3.2 Justice as a social force affecting other collective phenomena (Assumption 3)

Macro: Justice conceptions ⤍ Societal consequences

Micro: Justice attitudes → Individual behavior
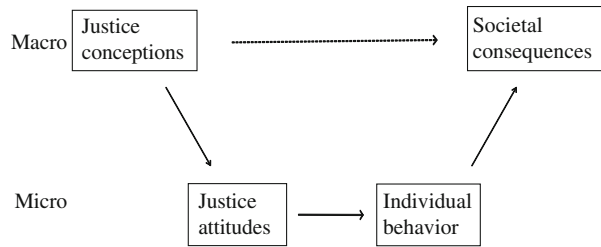
By treating explanations related to the three "why problems" as multilevel problems, we can avoid the methodological and theoretical constraints mentioned above. By following the macro–micro path or the micro–macro path, we can apply research designs to identify and prove causal effects with larger numbers and test theories for sufficient explanations. Instead of studying the effects of structural changes on justice at the level of a very small number of societies, we are now able to study how changes in structural position (e.g., due to occupational or regional mobility) influence justice attitudes or behaviors on the level of individuals by means of large population samples. In addition, going down to the microlevel also enables us to use experimental methods for testing causal relationships.

Traditionally, a scientific explanation is sufficient when it is based on universal laws stating that the phenomenon to be explained is the causal consequence of a law operating under particular conditions (Hempel & Oppenheim, 1948). The problem in sociology is that such universal laws have yet to be found in the social world, and sociologists are pessimistic about ever finding them on the macrolevel. However, by reaching down to the microlevel, we can develop and empirically test causal theories of behavior and attitude for-

mation that refer to universal laws. In this case, the theoretical primacy is at the level of the individual. Accordingly, theories of how individuals arrive at their attitudes, how they make decisions, why they show a certain behavior in a given situation, and what causal factors may be important now constitute the core of sociological models within justice research. The three "why problems" can then be addressed by applying action-theoretical models—e.g., by using various derivatives of the rational-choice paradigm (Kroneberg & Kalter, 2012)—or psychological mechanisms that explain why individuals adopt certain views of justice and why they exhibit certain justice-motivated behaviors.

But how does sociological justice research differ from psychological justice research (see Gollwitzer & van Prooijen, 2016, Chap. 4 of this handbook) if both are concerned with individual attitudes and behavior? The difference is that the sociological approach seeks to determine how structural conditions affect an individual's justice attitudes, and vice versa. One might also ask: How do social structures translate into justice attitudes, and how do justice attitudes translate into social structures? In both cases, the starting point of sociological inquiry is that the formation of justice attitudes, evaluations, and reactions are

not entirely individual processes but are embedded in social structures, relationships, and interactions (Hegtvedt & Johnson, 2000). Sociological and psychological approaches to justice differ in at least four major areas:

1. The first difference is the result of the sociological understanding of society as a structure of positions. Individuals are incumbents of hierarchical and vertical positions within a society. Each position is related to a set of opportunities and restrictions; resources such as status, power, and prestige; and specific interests. The interests of individuals at the top of a society with regard to how goods and burdens should be distributed differ from the interests of those at the bottom. In other words, "people have interests following from their location in the social structure and… these interests affect the way in which people justify allocation rules or criteria" (d'Anjou, Steijn, & Van Aarsen, 1995, p. 357). From this point of view, justice attitudes are "positional effects" (Boudon, 1998, pp. 172ff.), determined by one's relative position within a society. One consequence of this effect is that empirical researchers must recognize that subjects may differ in their justice attitudes and evaluations according to their societal positions during their lifespan.

2. The second difference is that sociology is interested in how the existing social structure defines the framework for the operation of generic psychological mechanisms. One example is *grid group theory* (Harris, 2014), according to which there are four different views of how benefits and burdens should be distributed (e.g., equally, according to merit) and individuals adopt a certain view based on the structural conditions under which they live. Although *grid group theory* does not address how these views develop, the idea is that the social structure provides specific experiences and opportunities for learning processes and that individuals develop their views on justice based on these experiences. If social learning is the generic psychological mechanism by which individuals acquire a specific understanding of how benefits and burdens should be distributed in a society, then the sociological question is how structural position and one's embeddedness in a specific social environment affect the outcomes of these learning processes. Therefore, the difference between a psychological approach and a sociological approach is that the former aims to identify generic psychological mechanisms such as social comparison (Runciman, 1966) or social learning, and the latter asks how these mechanisms function under different structural conditions. Again, this implies that empirical research must assume that individuals differ in their justice views because they have different learning or comparison opportunities over their lifespan.

3. A third difference follows directly from the premise that justice attitudes do not result from individual processes alone but are also affected by others. Consequently, the justice attitudes of other individuals in one's household, workplace, or social network will affect what is regarded as just and crucial for justice-motivated behavior (Hegtvedt & Johnson, 2000).

4. Finally, sociological justice analysis is concerned with proceeding from the microlevel to the macrolevel, asking as it does how individual behavior translates into social structure or collective phenomena (Opp, 2014). Collective phenomena are not just simple aggregations but may occur as a result of interactions among different actors (individual or collective) and of situational characteristics. In the wake of recent theoretical debates within sociology, "mechanismic" explanations, which identify regularities in processes that generate certain outcomes, have been considered appropriate. The task, then, is to identify and prove the operative *social* mechanisms that translate individual justice attitudes and justice-motivated behavior into social structures.

Figures 3.1 and 3.2 illustrate the sociological multilevel approach to justice in relation to the three basic assumptions presented earlier.

The first assumption—that justice is a social or collective phenomenon—can be reconstructed based on a multitude of individual actions and decisions on the microlevel. How these individual actions and decisions lead to a shared understanding of justice and to what extent—the "logic of aggregation" (micro to macro)—must be determined theoretically and empirically (Fig. 3.1, right side). The second assumption—that conceptions of justice are socially determined—is depicted by the schema as a whole; it requires first going down from macro to micro and showing how individual justice conceptions are affected by the social situation in which they develop. As long as these social conditions are reflected in the individual justice conceptions, they produce patterns on the macrolevel (differences among groups in a society or among societies). The third assumption (Fig. 3.2) is that shared justice conceptions as a collective phenomenon exist outside the individual; they affect the individual's justice perceptions and preferences and may cause certain justice-motivated behavior (e.g., protest behavior or slacking off in the workplace). These behaviors have some consequences on the macrolevel. The slanted arrows in Figs. 3.1 and 3.2 refer to *social* mechanisms, which need to be identified and empirically proved by sociological justice research; the lower horizontal arrows denote psychological mechanisms that explain why individuals show certain justice-motivated behaviors.

By means of this multilevel model for justice research, we can also identify what needs to be studied in order to get a proper description of the phenomenon and to arrive at satisfactory explanations. We have to start on the macrolevel and identify the existing conceptions of justice within a society. This must be done because individual justice attitudes are affected by distributive practices, by existing rules for the allocation of rewards and burdens, and by the attitudes and opinions of the members of social aggregates. These justice conceptions materialize in the institutional structure and in the allocation practices and rules of these institutions.

Institutional analysis is therefore the first area of sociological justice research. But there are also justice conceptions on the macrolevel that have not yet found their way into institutions. They are subject to discourses within different societal realms. For example, within academic discourses, political philosophers present their normative conceptions and discuss them with other scholars; politicians and political parties present their understandings of justice, derive policy measures, and discuss them with others in their party and with their political opponents; interest groups and other actors of civil society may also ground their claims in justice conceptions and discuss them in public debates. All these discourses reflect the different ways in which justice is understood in a certain society at a certain point in time. *Discourse analysis* is the second area of sociological justice research. As a result of the above, *attitude* research and research on *behavior* are the two other fields of justice research that may provide explanations of how societal conditions affect existing justice conceptions and how justice can be regarded as a social force that affects the behavior of individuals as well as the structure of a society. These four areas of sociological justice research will now be described in more detail, with examples from both early and recent research.

3.2.1 Identifying Conceptions of Justice Within Societal Institutions

The first area of sociological justice research is based on the observation that conceptions of justice materialize in societal institutions over time (Mau, 2004; Mau & Veghte, 2007). The basic institutional structures and the laws and other rules for allocating or distributing goods and burdens are the result of previous political debates, political conflicts, and political or bureaucratic decisions. Certain societal actors succeed in establishing rules and institutions (e.g., unemployment or health insurance, pension systems, collective bargaining systems, employment legislation) that not only are in their own interest but also reflect their views of justice (Rotman, 2014). Comparative research on the welfare state shows

that there is significant variation among societies with respect to the underlying normative logic of the basic institutional structure and the rules that govern the allocation of goods and burdens within each institution (Mau, 2004). Institutional structures and institutional rules are characterized by a high degree of inertia and path dependence, especially in relation to the underlying conceptions of justice (Torp, 2011). In reconstructing the normative logic of societal institutions, institutional analysis is capable of identifying shared justice conceptions that are part of a society's tradition and cultural heritage.

The basic idea of the institutional approach is that justice conceptions gradually permeate different institutional regimes in the political, economic, and welfare state realms. Thus, the aim of the research is to disentangle the implicit justice conceptions within the existing distributive structures and practices. There are at least three major research lines. The first involves identifying the justice conceptions in the blueprints of societal institutions and the processes and mechanisms by which they affect the actual distribution of benefits and burdens in a society. The second line asks how just or unjust institutional designs appear to be and which political, societal, or economic consequences are related to them. The third line is concerned with the question of how institutions shape justice attitudes of citizens within a society. Most of the contributions in all three lines come from comparative studies of the welfare state and are rooted in political science or sociology (e.g., Clasen & van Oorschot, 2002; Mau, 2004; Merkel, 2002; Rothstein, 1998).

One example of the first line of research, and the most prominent, albeit widely criticized, is the typology of welfare states described by Esping-Andersen (1990). His model of "three worlds of welfare capitalism" distinguishes three ideal types of welfare states: "liberal," "conservative," and "social democratic." These three regimes differ in the basic normative principles governing the institutional design of the social security system and, more importantly, in the norms and regulations that define who is entitled to what kind of welfare services and how the

financial burdens are distributed. (For a more detailed discussion of welfare states and justice, see Sachweh, 2016, Chap. 16 of this handbook). The liberal, or minimal, welfare state is strongly governed by the idea that only the needy require highly restricted state support (need); the conservative regime is based on the idea that welfare state benefits should depend on the amount of earlier contributions and should preserve the status acquired within the workforce (entitlement); and the social democratic regime is equality oriented in that it provides equal support for every citizen (equality). Outside the world of ideal types—i.e., in specific welfare states—it is not likely that there is only one justice principle guiding the distribution of welfare benefits and burdens. As Torp (2010) has shown for Great Britain and Germany, examples of liberal and conservative welfare states, respectively, the "British welfare state entails a link between the norms of equality and neediness, whereas in Germany the principle of equivalence between contributions and benefits is deeply rooted" (Torp, 2010, p. 11). However, Torp has identified a convergence in the institutional arrangements over the last decades as the need principle has become increasingly important and new concepts of justice have been developed that broach the issues of gender, family, and generation. Although most of the research focuses on the normative logic of welfare state institutions, there are also distinct normative conceptions governing a society's production system and its institutional setup. Schröder (2009) has identified the normative links between Esping-Andersen's three types of welfare states and the types of production systems (coordinated vs. liberal) that are discussed in the literature on the "varieties of capitalism."

A more general view of the institutional designs and their underlying justice conceptions has been presented by Miller (1979, 1999). Drawing on history, Miller shows that conceptions of justice are related in a systematic way to the basic structure of a society. In primitive, hierarchical, and market societies, not only does the content—i.e., the predominant justice principle that governs distributive practices—vary historically, but so does the role of social justice.

The question of how conceptions of justice shape the distributive practices of institutions is addressed by Elster's (1992) "local justice" approach. Its basic aim is to study the decision-making processes within institutions or organizations and to prove whether or not, and how, the justice conceptions of different stakeholders within an institution affect decisions and institutional designs. According to research on the distributive practices in different institutions of the welfare state and the economy, justice conceptions are used mainly for ex post legitimation, and the institutional logic, one example of which is economic effectiveness, is more important for individual decisions than are justice considerations.

Whereas the first line of research is primarily interested in description, the second hovers between the borders of normativity and description. This is particularly apparent in the work of Rothstein (1998), who draws attention to the necessary unity between institutions of societies and moral expectations of citizens. In his view, just institutions are essential for the social functioning of societies from both a normative and an empirical perspective. Goodin, Headey, Muffels, and Dirven (1999) argue that a just society is one in which the distributive practices are in line with the institutional imperatives. The task, then, is to describe the existing logic and practices of institutions and compare them with the self-stated normative claims of the respective institution. From the literature on normative justice, Merkel (2002) distilled five goals of distributive justice in modern societies and then asked to what extent these goals are met by the three types of welfare states, arriving at a hierarchy of "just societies." Soltan (1987) suggested another, quite different approach: An institutional arrangement is just to the extent that it can command voluntary compliance and willingness to participate and be implemented successfully. To identify just institutional arrangements, one has to compare the institutional design with the actual outcome of an institution.

Since societal institutions constitute the macrolevel of a society, they are an important factor in determining the social situation of individual actors. These institutions not only shape the distribution of various benefits and burdens, they also function as agents of socialization and contextualize the formation of justice attitudes. The influence of social institutions on individual justice attitudes is the subject of the third line of research, which consists mainly of comparative studies of the welfare state (e.g., Mau, 2004; Svallfors, 2003). As individuals witness how decisions are made within institutions, they learn which conceptions of justice are appropriate instruments for resolving conflicts regarding the distribution of goods and burdens. In this sense, institutions' conceptions of justice precede those of individuals; they determine the available justice conceptions in a society; and they affect stability or change over time.

3.2.2 Identifying Conceptions of Justice in Societal Discourses

Within a society, shared conceptions of justice are not limited to those already imprinted into the societal institutions. Certain normative ideas may not yet be part of the "blueprints" and allocation practices of existing institutions but are nevertheless an integral part of philosophical, political, and public debates. Following the legacy of one of the founding fathers of sociology, Emile Durkheim, the sociological approach to justice has to include such normative discourses—not because sociology can decide which philosophical or political positions are right or wrong but because the views expressed provide information about how justice is understood within a society at a particular point in time. Hence, philosophical conceptions or the justice conceptions of various actors in the public arena constitute data points on the macrolevel that have the same epistemological status as aggregated measures of attitudes of "lay" individuals; they are part of the stock of empirical data that must be considered when justice is studied as a social phenomenon.

Thus, this second area of research concentrates on justice-related discourses within a soci-

ety. One reason for considering societal discourses is that they may reflect structural conditions within a society. Issues of justice and the substantial ideas expressed may emerge and be debated as a consequence of certain structural conditions or changes in a society (Durkheim, 1887/1993; Miller, 1979, 1999).[2] Justice issues may find their way into public debates, for example, as a consequence of growing income inequalities. In this case, sociological justice analysis will describe the discourses about the role of justice and the rules of distribution of goods and burdens in a society as a function of the structural conditions of that society.

There is some evidence that the presence of justice issues in political, academic, and public debates and the substantial meaning assigned to justice do indeed result from structural changes in a society. One example from the academic realm is John Rawls' highly influential philosophical work *A Theory of Justice* (1973) (see Meyer & Sanklecha, 2016, Chap. 2 of this handbook). Rawls' book was published in the wake of a period of political disputes and conflicts surrounding civil rights in the United States. The philosophical debates following its publication were embedded in societal developments that were taking place in the United States and in most other Western countries. These debates were characterized by increasing inequality in income and wealth during the 1970s and 1980s and certainly fueled the interest in social justice, which had been neglected in political philosophy for quite a long time. However, Durkheim's idea of studying moral beliefs in a society went one step farther. He assumed that there are systematic relationships between the structural conditions

and the *content* of moral positions and moral reflections. So the question is not only *if*, or under what societal circumstances, public debates on justice issues occur, but also *which* conceptions and notions of justice are formulated and how they correlate with societal conditions (Bankston, 2010; Brodie, 2007).

To identify the conceptions of justice prevalent in a society at a certain point in time, two methodological approaches can be used. One approach is to use qualitative research methods and to study public discourses in the media and in the political sphere; the other is to rely on opinion polls. An example of the first approach is the study by Volkmann (2004), who analyzed articles in two German newspapers, a liberal and a conservative one, on the concepts of justice being expressed when the German Bundestag was considering a reform of the national pension scheme in 2000. Volkmann found that the two newspapers agreed that the need principle was the basic distributive rule governing a pension scheme; however, they differed in their opinions about how much inequality should be generated among the retirees and how the burden of contributions should be distributed. Volkmann concluded that beyond the fine line of need-based justice there was no consensus on justice issues.

How justice conceptions are used in public debates and how they can be reconstructed by discourse analysis has also been studied by Rokicka and Warzywoda-Kruszyńska (2006). The authors analyzed the use of justice conceptions in two Polish newspapers over a certain period of time during the transition and asked how justice concerns were used to legitimize different political positions. Reeher (1996) conducted structured, open-ended interviews with legislators in Connecticut to determine the meaning they assigned to social justice, what their individual justice conceptions were, and how they used these conceptions in the political sphere. Another example is a study by Rotman (2014), who analyzed the parliamentary debates about the national budget that took place in Israel between 1974 and 2009 in order to determine what conceptions of justice were used to justify the various political positions, and how. He found

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[2] The idea that moral beliefs and moral sentiments reflect the structural conditions of a particular society was originally formulated by Émile Durkheim. According to him, the task of sociology as a moral science was to study the different expressions of morality empirically and to show how they are affected by the structural conditions within a society. For Luhmann (1996), this entails the accurate observation of how and under what structural conditions moral and ethical questions are communicated within a society. The assumption is that there are correlations between the semantic forms of ethical reflections and the social structures of a society.

that over time different concepts of justice were used to legitimize the political claims and that there was "a gradually deepening confrontation between a conception of justice that puts the economy at the top priority and a conception that puts the benefit of the citizen and the society before the economy" (Rotman, 2014, p. 24; see also Opotow & Belmonte, 2016, Chap. 24 of this handbook).

Another body of literature focuses on the changing conception of justice within a society. Whereas the political science literature is interested in how stakeholders in the political arena use different concepts of justice to legitimize their claims and in how these concepts affect political decisions and legislation, sociological discourse analysis aims to identify the structural or, more generally, the societal conditions that explain the changing conceptions in a society. In 2002, Vivien Schmidt published the results of her analysis of political discourses about the role of values and justice conceptions in public and political discourses during the late 1990s and early 2000s in Europe (Schmidt, 2002). Based on Schmidt's findings, Leisering (2004) identified four paradigms of social justice that underlie public debates on welfare state reforms in Germany: (1) a need-based concept with welfare state transfers based solely on socially defined basic needs; (2) an effort-related concept in which individual achievements in the work sphere are crucial for any welfare state transfers; (3) a "productivist" concept, which states that the distribution of goods and burdens should maximize welfare overall within a society; and (4) the concept of participatory justice, which aims to enable all individuals to take part in the economic, social, and cultural life of a society and to achieve their life goals. Whereas the first two concepts are based on the classical idea of the state as a redistributive agency that focuses mainly on income and wealth, the last two concepts ask for a social investment in the state's spending money to increase the opportunities of citizens. Leisering thus shows that the political debates in Germany before 1990 were dominated by the classical concepts, whereas in the early 2000s, the productivist and participatory concepts gained more influence (see also Brettschneider, 2007).

Up to this point, the examples presented use qualitative research methods to describe justice as a social phenomenon. The other methodological approach to identifying a particular society's conceptions of justice is to use opinion polls, with large population samples providing the basis for describing a society's views on justice issues. The main focus of this approach is on aggregated patterns of attitudes in a society and on their development. In most cases, the issues include perceptions of economic fairness, distributive justice with regard to income and wealth, and justice of opportunities. Recently, a growing number of studies have been conducted and data for different societies and points in time have been provided by public opinion research centers such as Gallup in the United States and the Allensbach Institute in Germany. Since 2001, Gallup has been monitoring the perceived justice of income taxes, and a 2013 poll indicated that 55 % of US citizens considered their income taxes to be fair, the lowest percentage reported since the initial poll taken in 2001.[3]

Another interesting example is a 2012 poll on the perception and evaluation of income inequalities in the United States carried out by the Pew Research Center. The conclusion was that the American people "don't necessarily want to take money from the wealthy; they just want a better chance to get rich themselves. They care about policies that give everyone a fair shot" (Kohut, 2012).

What makes these kinds of studies valuable is that they provide information about what individuals think about justice and to what extent their perceptions are shared within a society. What these studies are not capable of is providing theory-based explanations for why these justice attitudes emerge and why they are stable or change over time. In order to answer the three basic "why problems" of sociological justice research and thus to provide causal explanations, we must concentrate on the microlevel and study individual attitudes and behavior. As will be discussed in the following two sections,

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[3] http://www.gallup.com/poll/161780/fewer-americans-view-income-taxes-fair.aspx.

attitudinal justice research is needed to verify the assumption of the social conditionality of justice, whereas behavioral justice research is needed to identify the consequences of justice as a social force.

3.2.3   The Social Conditionality of Justice Attitudes

For a long time, attitudinal justice research was dominated by contributions from psychology. However, central theoretical models that guided empirical research since the 1950s originally developed within sociology, namely the theory of relative deprivation and equity theory. For one, it was the sociologist Samuel A. Stouffer who in his famous study *The American Soldier*, conducted during the Second World War, discovered that it was not the objective but rather the relative mobility chances within military units that determined soldiers' feelings of deprivation. This empirical finding describes the central idea of the theory of relative deprivation; we compare our own situation or the situation of our group with the situations of others, develop a sense of entitlement through this comparison, and feel discontent when our own situation does not meet our expectations. Although the theory is compelling, it does not allow for predictions about which individuals will engage in such comparisons and what exactly can be expected from upward, downward, or lateral comparisons.

Conversely, the basic idea of equity theory can be found in the early work of the sociologist George C. Homans, who noted that "a man in an exchange relation with another will expect that the rewards of each man be proportional to his costs—the greater the rewards, the greater the costs—and that the net rewards, or profits, of each man be proportional to his investments—the greater the investments, the greater the profit" (Homans, 1961, p. 75). From the 1960s to the late 1980s, justice attitudes were not the focus of sociological research, one reason being that at this time sociology was much more interested in "grand theories" that would explain societies from a macroperspective (Alexander, 1987). Within the two dominant theoretical paradigms—

Parsons' structural-functionalist theory and Marx's theory of capitalism—there was no place for studying justice attitudes empirically, either because individuals were not the focus of the theory or because justice was understood entirely as a normative category.

With the fall of the Berlin Wall and its consequences for Central and Eastern Europe, issues of social justice and the related attitudes and beliefs drew the attention of sociologists carrying out comparative attitude research (Kluegel, Mason, & Wegener, 1995). However, during the 1990s and after 2000, formerly Communist transformation societies were faced with a steady increase in income and wealth inequality, as did the Western societies. As a result, the perception and evaluation of income inequalities became an object of research concerning welfare states and inequality and of classical stratification research (Hadler, 2005; Kelley & Evans, 2009; Kunovich & Slomczynski, 2007; Sachweh & Olafsdottir, 2012; Verwiebe & Wegener, 2000).[4] In contrast to opinion research, the aim of comparative attitude research was not just to identify shared understandings but to explain why certain patterns of justice attitudes exist in a society in the first place.

3.2.4   Behavioral Consequences of Justice

Since its beginnings, empirical justice research has been focusing primarily on how individuals behave when they perceive an injustice. Studies conducted in the 1950s had already shown that behavior at the workplace was affected to a great extent by justice concerns (Homans, 1953). During the last 30 years, justice-motivated behavior within organizations has been studied mainly by psychologists (see Colquitt, Conlon, Wesson, Porter, & Ng, 2001), who found that justice or injustice matters in the way that perceived injus-

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[4] At that time, questionnaire items on justice attitudes had already found their way into various national and international survey programs such as the General Social Survey and the International Social Survey Program.

tice reduces commitment, effort, and trust in management and supervisors and related behavioral forms (van Dijke & De Cremer, 2016, Chap. 17 of this handbook).

Some attempts have been made to study the consequences of perceived injustice within other realms of behavior. A major concern, for example, is behavior in the political realm, such as voting behavior or protest activities (see Mühleck, 2009; Rasinski, 1988). The problem with this kind of research is that it tends to rely on self-reports or behavioral intentions rather than on observed behavior. Economists in particular are critical of such a research strategy because it cannot reveal individuals' behavior; they argue that questionnaire-based research presents respondents with low-risk situations, implying that expressing one's political behavior on a questionnaire is one thing, whereas actually behaving in the stated way, and bearing the related costs, is quite another.

During the last 20 years, another branch of behavioral justice research has developed. Frohlich and Oppenheimer (1992) conducted experiments in which they simulated the original position stated in the justice theory put forth by Rawls (1973) and asked subjects to make choices regarding the rules governing the distribution of income in a fictitious society. What they found was that, contrary to Rawls' theory, people endorsed an upper limit within the income distribution. The results of Mitchell, Tetlock, Mellers, and Ordóñez (1993) pointed in the same direction. This kind of research has been complemented in the last 20 years by a growing number of experiments in the field of economics. (For a thorough review of the literature, see Konow & Schwettmann, 2016, Chap. 5 of this handbook). Originally motivated by the intention to criticize the neoclassical model of man within classical economics, researchers began experimenting to see how people allocated money between themselves and others. By applying strategic games based on game theory and by varying situational conditions within experiments, behavioral economists have increasingly shown that individual behavior is indeed motivated by justice considerations (see

Fehr & Schmidt, 2006). The problem with this research is that the experiments involved mainly students of economics and that the samples were homogeneous with respect to age, education, cultural background, and so on.

Assuming that preferences for certain justice conceptions result from learning processes, processes of socialization or comparisons made over a lifetime, and being part of a cultural heritage, the findings reported by the behavioral economists may have high internal validity but very low external validity, meaning that they reflect justice conceptions of a certain group of individuals but not general patterns. Furthermore, experimental conditions hardly resemble real-life circumstances; similar to the problem of self-reporting in surveys, individuals' behavior in the laboratory does not necessarily reflect their behavior in real life. One solution, from a sociological point of view, would be to study behavior in different cultural contexts and within heterogeneous samples.

The study by Henrich et al. (2010) included institutional and cultural contexts by running identical experiments in 15 diverse societies and populations. These investigators looked at how fairness-related behavior in the dictator, ultimatum, and third-party punishment games was connected to the existence of institutions that maintain fairness in exchange relations (i.e., markets and religion). They found that individuals who lived in small communities that did not have such institutions were much less concerned with justice in transactions involving strangers. The results of this study support the assumption that fairness-related behavior not only is driven by innate psychology but also depends on existing societal norms and institutions. However, in addition to the problem of cultural heterogeneity, from a sociological point of view, behavioral analyses must also consider the social context in which an individual behaves. Most individual actions do not occur in solitude; rather, individuals are affected by how others around them behave, that is, by rules that determine which behaviors are accepted and which are condemned (see Hegtvedt & Johnson, 2000).

By applying the multilevel model of explanation, we were able to identify two basic research areas on the macrolevel and two on the microlevel. Since the major theoretical and empirical contributions within sociological justice research over the last 30 years have come from survey-based attitudinal research, we will now review the main theoretical models (Berger, Zelditch, Anderson, & Cohen, 1972; Jasso, 1980; Markovsky, 1985; Stolte, 1987) and some of the most relevant empirical results.

3.3 Theoretical Models and Empirical Findings of Sociological Research on Justice Attitudes

By the late 1940s and early 1950s, researchers had concluded that ideas about what is just or unjust in a particular situation are not idiosyncratic but instead reflect intrapersonal and interpersonal regularities as a result of psychological, social, and situational conditions (Homans, 1953; Stouffer, Suchman, DeVinney, Star, & Williams, 1949). At the same time, it has become clear that the fulfillment or nonfulfillment of individual conceptions of justice is connected to attitudinal and behavioral reactions, which in turn have an effect on different social processes.[5] Sociological justice research was first concerned with individuals' perceptions about income inequalities and their evaluations with regard to justice (Alwin, 1987; Kluegel & Smith, 1986; Mirowsky, 1987; Robinson & Bell, 1978; Shepelak, 1989; Shepelak & Alwin, 1986). Using data from cross-sectional population surveys, researchers were able to test for differences among individuals with various sociodemographic characteristics such as gender, race, age, education, and income. Over time, however, it has become clear that individuals have expectations regarding not only the justice of distribution of outcomes but also the way in which distributional outcomes are

achieved. Extending Wegener's (1992) classification, one can distinguish (1) order-related, (2) procedural, and (3) outcome-related attitudes in the study of justice.

Order related justice attitudes. Research on order-related justice attitudes seeks to establish why individuals prefer certain distributive principles in a social situation. In keeping with psychological justice research, at least four principles can be distinguished (Deutsch, 1975; Konow, 2001; Miller, 1999): *equality* (everyone should receive the same); *equity* (benefits and burdens should be distributed proportional to individual investments); *need* (everyone should get enough to cover basic needs); and *entitlement* (individuals should receive benefits or burdens according to their ascribed or achieved status characteristics, such as gender, education, occupation, or origin). One of the key empirical findings is that there is a homology between type of social relationship and application of the justice principles. In long-term, strong-tie relationships, equality, and need-related rules are preferred, whereas in short term, competitive relationships, the equity principle dominates, and in hierarchical relationships, entitlement is important (Törnblom, 1992). The stronger the social embeddedness in the allocation decisions—e.g., through direct personal contact with other subjects or the experimenter— the faster subjects base their decisions on the principles of equality or need (Konow, 2001). This applies even when respondents have to choose a fair distribution of income in a society (Liebig et al. 2015, Traub, Seidl, & Schmidt, 2009). By the early 1980s, it was demonstrated that not only does the type of social relationship determine the selection of a justice principle but the reverse is also true: the validity and application of the relevant principle of justice also has an effect on the nature of the social relationship. Equality or need-based rules strengthen close, long-term relationships; rules based on the equity principle create competitive, short-term relationships (Schwinger, 1981).

The "logic of justice" shown in the homology between type of social relationship and the respective justice principle can be described

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[5] One of the first empirical studies of the 1950s showed that employees reduced their quantitative and qualitative work effort if they considered their income to be unjustly low (Homans, 1953).

Fig. 3.3 The logic of order-related justice: homology between type of social relationship and justice principle. *Source*: Authors' compilation based on Fiske (1993)

Type 1 Solidary communities: Family *Need*	Type 2 Hierarchical relationships: Organization *Entitlement*
Type 3 Long-term social exchange relationships: Nonhierarchical networks, peer groups, cooperatives *Equality*	Type 4 Short-term economic exchange relationships: Market *Equity*

Source: Authors' compilation based on Fiske (1993)

with a higher degree of differentiation by using a typology introduced by Fiske (1993). Fiske assumed that there are four ideal types of social relationships (see Fig. 3.3). The *first type* of social relationship is characterized by strong ties and long-term relations between the individuals. The individual is integrated in the community (*Gemeinschaft*, in the terminology of Tönnies, 1887), in which all members share the same origin and identity. These communities define themselves as "solidary communities" in which helping one another is a matter of course. They do this to ensure the survival of their own group or family and, from an evolutionary perspective, the survival of their descendants and their genes. The classical examples are families or clans based on kinship relations. The distribution rule seen as just in those relationships is the need principle: everyone gets as much as is needed to survive.

The *second type* of social relationship is characterized by hierarchical relations. Examples include hierarchical feudal societies (*Ständegesellschaften*) and bureaucratic organizations with different hierarchical levels in which each level has authority over the subordinate levels. In these contexts, the responsibility of higher-ranking individuals is to give instructions to lower-ranking individuals. The

higher-ranking individuals have the power to sanction subordinates should they not follow the instructions, and they take responsibility for the lower-ranking individuals who, in turn, recognize the higher-ranking individuals' authority. The corresponding principle of justice is entitlement. All individuals get what they are entitled to according to their position in the hierarchical structure.

The *third type* of social relationship is marked by an absence of rank differences. Examples include nonhierarchical networks, peer groups, and cooperatives. Members treat one another as equals despite individual differences, and everyone has the same rights and duties. Relationships are dominated by mutual exchange in which, following the principle of strict reciprocity, rewards and inputs among individuals are balanced. The dominant principle of justice is equality.

The *fourth type* of social relationship is defined by short-term relationships among strangers. It is typical of market relations, which are economic exchange relations in which individual actors offer goods and services to maximize their personal benefit. The justice principle related to this type is equity.

We can conclude from this model that the meaning of justice is not based on any single principle that is superior to any other, competing

principle. Individuals can regard different distributive principles as just, applying each of them to different situations according to typical social relationships among the receiving parties, the type of goods or burdens being allocated, and other attributes.

Although the individual principles lack conceptual clarity, the implication of classifying justice principles into specific institutionalized social contexts is that applying an inappropriate principle of justice in a specific situation can result in an experience of injustice. In reference to Durkheim and sociological neoinstitutionalism (see Meyer & Rowan, 1977), injustice is thus a kind of "decoupling" of the normative logic of the structure and existing allocation and distributive practices or outcomes (see also Goodin et al., 1999). Another source of experienced injustice is a difference of opinions about which type of social relationship dominates in a specific context. If one defines the society as a community that is based on having the same origin, the need principle would be seen as the dominant distribution rule; if one defines the society as an aggregate of individuals who struggle for their individual benefits, the equity principle would be dominant in resolving societal distribution processes.

Order-related justice attitudes vary significantly among nations and cultures (Fischer & Smith, 2003). This was shown in a series of studies from the 1990s, in which, for example, respondents from the United States showed a significantly greater preference for the equity principle than did respondents from European countries such as Sweden and Germany, who showed greater agreement with the equality or entitlement principle (Haller, Mach, & Zwicky, 1995; Wegener & Liebig, 1995a). These findings appear to have stabilized over the years, as has been shown in recent studies that included additional countries (e.g., Blekesaune & Quadagno, 2003; Fişek & Hysom, 2008; Gerlitz, Mühleck, Scheller, & Schrenker, 2012; Jasso & Meyersson Milgrom, 2008). The results can be interpreted as expressions of cultural differences between countries because they emerge, for example, from different religious traditions or political cultures (Gerlitz et al., 2012; Wegener & Liebig, 1995a,

1995b). The assumption is that through socialization processes, individuals learn conceptions of justice and how to resolve conflicts over the allocation or distribution of benefits and burdens. The preference for a particular principle of justice is the result of a "normative orientation," which is itself the result of socialization processes (Wegener & Liebig, 1995a). Justice attitudes also depend on individuals' position in the inequality structure of a society because they prefer those principles which give them an advantage in the allocation of goods and burdens. In this case, individuals are guided by their rational interests ("rational orientation," Wegener & Liebig, 1995a). Evidence for such status-dependent preferences for principles of justice is plentiful (see, e.g., Gerlitz et al., 2012; Kunovich & Slomczynski, 2007). It confirms the assumption that low-status individuals prefer the equality principle, whereas high-status individuals favor entitlement or equity (Sachweh & Olafsdottir, 2012). How individuals translate position-related interests into justice attitudes has not yet been explained convincingly.

Procedural justice attitudes. When evaluators have assessed the procedures for distribution processes, they have found no differences in culture or status. An indicator of the importance of procedural justice is that individuals accept unfavorable outcomes if these outcomes result from fair decision-making processes. In a recent study, Struck, Pfeifer, and Krause (2008) have shown that layoffs are more likely to be perceived as fair if they occur in compliance with comprehensible rules. This finding also indicates that negative outcomes are considered just if they are the result of a just decision-making process. The outstanding importance of procedural justice is connected to the decision-making process and the "group value" (Lind & Tyler, 1988) that it reveals, including whether individuals are recognized as members of a society, an organization, or a group, and whether their interests are taken seriously. Decision-making processes that are perceived as unfair therefore indicate a disregard for individual interests and needs (Tyler, Degoey, & Smith, 1996). Criteria for procedural justice include the

principle of equal treatment, whether objections can be formulated, and whether the decision-making processes are transparent, comprehensible, and revisable.

Outcome-related justice attitudes. Outcome-related evaluations of justice do not depend on the question of which rules should apply but on the actual results of allocation and distribution processes. Here, the focus is on the amount of goods an individual holds (e.g., the actual earned income) or the burdens with which someone must cope (e.g., income tax) (Liebig & Mau, 2007). A condition for applying the category of justice on distributive outcomes is, apparently, that the allocation of goods or burdens is basically the result of the actions of individuals or institutions, and thus personal or institutional responsibilities can be addressed. Inequalities are considered and perceived as unjust only when the distribution is brought about by an intentional act or omission of an action and when the responsible actors cannot provide sufficient justification for the violation of expectations regarded as legitimate (Mikula, 2002, p. 268).

The main focus of these theoretical models has been the justice evaluation process itself, regarded as a comparison process in which individuals compare their holdings with those of others. One can derive from equity theory (Adams, 1965; Homans, 1974) the idea that individuals do not consider equality of income per se to be just; rather, they consider inequalities of earnings to be legitimate if these inequalities are based on different inputs; equality of earnings is considered legitimate only if the efforts are the same. Thus, the equity principle seeks to achieve relative equality. Moreover, justice can be defined only as a relative measure. There is no objective, absolute value for fair rewards because fairness does not depend on one's own efforts alone but also on the efforts of a reference individual. The critical points of this approach are that the principle is valid only in specific social contexts (exchange situations) and that the comparison is "anomic" in that there is no general reference structure. Status value theory formalizes justice as proportional equality based on status (see Berger et al., 1972).

In contrast to equity theory, status value theory not only refers to a local (dyadic) comparison but also expands the frame of reference to a "generalized other." The actual rewards (e.g., individual gross earnings) are thereby compared with the just rewards (e.g., the average gross earnings of someone with a similar status in the same occupational group). The approach therefore accounts for structural conditions and general norms that are important for justice evaluations.

The justice evaluation theory developed by Jasso (1978, 1980, 1986) and by Jasso and Wegener (1997) assumes that a justice evaluation, J, can be represented by the logarithmic ratio of the actual holdings, A, and the holdings perceived as just, C [$J = \ln(A/C)$]. If A takes the same value as C, then the justice evaluation is 0; the outcome is rated as fair. If the perceived just holding C is higher than the actual holding A, the individual feels undercompensated. In the case of overcompensation, the actual holding A is higher than the perceived fair holding C; J takes a value greater than 0. The theory makes up for the weaknesses of previous specifications by generalizing comparison processes (in contrast to the dyadic comparisons in the equity approach) and by suggesting an independent unit for justice evaluations (in contrast to status value theory). The justice evaluation theory is the mathematical core of a broader research program that allows a reconstruction of how the intrapsychological mechanisms in justice evaluation processes work. Moreover, the justice indices related to this measure allow for conclusions to be drawn about the general degree of injustice in a society. Therefore, the theory includes both a microperspective and a macroperspective on justice (see Jasso, 2012; Markovsky & Eriksson, 2012a, 2012b). Markovsky (1985) formulated a multilevel theory of justice that integrates individual and group comparisons into one justice evaluation theory.

Social comparison is the most important generic psychological mechanism in outcome-related justice attitudes (Stouffer et al., 1949; Törnblom, 1992). Individuals assess their own outcomes or the outcomes of others by comparing

them with different reference individuals and reference groups, using their reward or burden level as benchmarks. Which reference individuals or reference groups are selected has not yet been determined with any degree of certainty. Major (1994) identifies three determinants for identifying referent standards: (1) structural conditions such as closeness and salience of reference individuals or reference groups, (2) similarity in relevant characteristics, and (3) the motivation to compare, in which Gibbons and Buunk (1999) also include the dispositional tendency for social comparisons. Here, it is decisive as to whether it is an intragroup or intergroup comparison; the first leads to an adjustment of expectations on the existing level, the latter to a questioning of the situation.

Recent work (Buunk & Mussweiler, 2001) has emphasized the importance of structurally mediated comparison possibilities (Buunk & Gibbons, 2007) because they are mediated by households, networks, or companies (Blau, 1994; Clark & Senik, 2010; Kulik & Ambrose, 1992). Liebig, Sauer, and Schupp (2012) used longitudinal data to show that comparisons between household partners who have the same occupational status affect the justice evaluations of their own earnings. Particularly for women, differences in pay related to gender become obvious in status-homogeneous households. In addition, research shows the importance of comparisons within occupational groups and with other occupational groups (Sauer, Valet, & Liebig, 2013; Liebig, Sauer, & Valet, 2013).[6] Comparisons are based on clear ideas about what reward or punishment should be connected with which characteristics (e.g., level of education, occupation, gender). Since there appears to be a broad consensus on what these

characteristics are (Runciman, 1966), one could say that there are commonly shared social standards, particularly in relation to earnings. Formal education, work experience, and occupation are considered important determinants of earnings across countries and groups of respondents (general population, workers, students) and thus pinpoint the relevant characteristics for (potential) reference individuals or reference groups (Jasso & Rossi, 1977; Sauer, Auspurg, Hinz, Liebig, & Schupp, 2009).[7]

3.4   Conclusion

This chapter provided an overview of the current state of theoretical and empirical sociological justice research. Starting with the multilevel model of sociological explanations and distinguishing four approaches to empirical justice research, we detailed the sociological view on justice. We have seen that the behavioral consequences of justice perceptions in particular are still uncharted by sociological research. Taking the multilevel model as a blueprint for identifying research questions within sociological justice research, we also must note that practically no empirical research has been carried out on the mechanisms and conditions underlying the ways in which individual justice behavior influences macrolevel outcomes in a society. Another *desideratum* is a sociological theory to answer the two fundamental questions in justice research: (1) why justice is an important phenomenon (cf. Liebig, Sauer & Hülle 2015) and (2) why individuals have different justice attitudes and beliefs. Answers to these questions require a general model of human behavior that can explain why justice is rational and how social conditions affect justice preferences. Future studies in the area of sociological justice research should focus primarily on the causal mechanisms of how jus-

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[6] The analysis is based on data provided by the German Socio-Economic Panel (SOEP). In this ongoing longitudinal study, members of households are surveyed over several years. The question concerning justice of earnings has been included every 2 years since 2005. In the near future, it will be possible to investigate changes of justice attitudes over individuals' lifetimes and to investigate the consequences of injustice as well as the determinants of justice (Sauer & Valet, 2013; Schunck, Sauer, & Valet, 2015).

[7] To identify those individual or situational characteristics that are considered essential to just rewards or burdens, the factorial survey is increasingly the method of choice for sociological research on justice (Liebig, Sauer, & Friedhoff, 2015; Wallander, 2009).

tice attitudes emerge, how structural conditions shape and influence justice attitudes over the life course, how stable or fluent these attitudes are, and what the consequences of injustice are for individual behavior or well-being. For this purpose, longitudinal data are needed to investigate changes in justice attitudes over time and to disentangle the causal chain.

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Psychology of Justice

4

Mario Gollwitzer and Jan-Willem van Prooijen

4.1 Introduction: A Psychology of Justice

What do people consider as fair vs. unfair? Why do they care about justice in the first place? How do they respond to experienced or observed injustice? How do people differ from each other with regard to justice-related perceptions, attitudes, and dispositions? How does the social context shape how people think and feel about (in)justice and how they respond to it? How do justice conflicts arise between groups, and how can these conflicts be solved?

These are typical questions that psychological justice research has been addressing systematically and empirically for more than 50 years now. Other scientific disciplines, such as philosophy, sociology, economics, or criminology, ask similar questions and provide a converging perspective on the dynamics of justice in our society. Moreover, there is certainly a degree of overlap in the various approaches and theories that are endorsed by these disciplines. Yet, the angle from which psychology

looks at these questions offers a unique contribution in various respects. Broadly speaking, most *philosophical* approaches to justice focus on normative, objectifiable aspects and on the nature of justice-enforcing structures (what *is* just vs. unjust; e.g., Rawls, 1971; see Meyer & Sanklecha, 2016, Chap. 2 of this handbook). A psychology of justice, on the other hand, is more concerned with *subjective* aspects (what people *perceive as* just vs. unjust). Unlike the *sociological* perspective, which typically defines justice on the basis of societal-level structures and forces (e.g., Törnblom & Vermunt, 2007; see also Liebig & Sauer, 2016, Chap. 3 of this handbook), a psychology of justice is more strongly focused on the combination of *individual-level* and *situational* processes leading to justice-related cognitions, affects, and behaviors. Unlike the *economical* perspective, which either defines justice as a system of resource distributions (macro-level perspective; e.g., Fleurbaey, 2008) or as a system of individual rational choices (micro-level perspective; e.g., Bolton & Ockenfels, 2000; see also Konow & Schwettmann, 2016, Chap. 5 of this handbook), a psychology of justice is less interested in modeling structures, but rather in understanding and explaining how people think and feel about justice.

The present chapter describes the current state of affairs regarding the psychology of justice. We will try to give an overview of the most influential psychological theories of (in)justice, we will describe a representative set of studies

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and empirical findings from justice research in psychology, and we will discuss how these theories and findings can be used (a) to better understand justice-related perceptions, cognitions, emotions, and behaviors, and (b) to contribute to peaceful solutions to justice conflicts in our daily lives.

This chapter is hierarchically, "vertically" organized. It describes psychological justice research on three different levels. The first, lowest level is the individual level: Sect. 4.2 focuses on justice "within" the individual. We start by investigating individual needs, concerns, and motives that may be able to explain whether, why, and under what circumstances people care about justice. This section also discusses how people differ in how they perceive, think about, and react to justice. Finally, this section also describes theory and research demonstrating that people like to see themselves as being moral, benevolent, and fair——although they sometimes do not really behave that way.

The second level is the interpersonal level (Sect. 4.3). Justice and injustice manifest in how two (and often more) people behave towards each other: how they distribute resources ("distributive justice"), what procedures people use to make decisions ("procedural justice"), how respectfully they treat each other informally in direct interpersonal encounters ("interactional justice"), how they follow vs. transgress social norms, and how they respond to such norm violations ("retributive justice"). In this section, we will discuss how people assess (in)justice in interpersonal relations, how they enforce justice when other people violate justice norms, and how they restore justice to maintain social relations.

The third level is the intergroup level (Sect. 4.4). Many justice-related conflicts exist between social groups or social "categories" such as companies, nations, or cultures. Wars that are led in response to terrorist attacks may serve as an extreme example here. In this section, we will discuss what leads people to commit injustices to members of other groups and how group members—even those who were originally uninvolved in the events that origi-

nally sparked a conflict—respond to perceived group-based injustices.

4.2 Individual Dynamics: Justice "Within" People

Psychological justice research on the individual level has mainly been interested in three topics: Justice-related motives, personality traits, and the "moral self." With regard to justice-related *motives*, psychological research has investigated whether justice is a motive in itself, a so-called "primordial" motive, or rather a proxy reflecting other, potentially more basic motives or needs such as managing uncertainty, securing social acceptance, or maximizing one's self-interest. With regard to justice-related personality *traits*, psychological research has investigated how (and why) people reliably differ from each other in justice-related attitudes and behavioral dispositions. With regard to the "*moral self*," psychological research has investigated how people manage to uphold a positive moral self-concept, although their behavior sometimes contradicts the mandates of being fair and moral.

4.2.1 Justice-Related Motives

Justice, fairness, and morality are important topics in people's lives. Perceptions of being treated unfairly are usually accompanied by strong emotions (anger, resentment, moral outrage) and by a strong motivation to act against the injustice, to restore justice, and to put the world back into balance. This claim is not only backed up by anecdotal examples, but also by countless findings from empirical studies. In the domain of *distributive justice* (which deals with the fairness of exchanges and the distribution of goods and resources; see Jasso, Törnblom, & Sabbagh, 2016, Chap. 11 of this handbook), for instance, it has repeatedly been shown that people prefer equal payment for equal contributions. Being paid less than others, despite equal contributions, not only evokes strong feelings of anger and resentment, but also compensatory actions that

aim at reestablishing a sense of "equity." For example, underpaid workers have been found to lower their job performance or to steal from their companies (Greenberg, 1982, 1993; Skarlicki & Folger, 1997)——behaviors that are now referred to as counterproductive work behaviors (Cohen-Charash & Spector, 2001). In the domain of *procedural justice* (which deals with the fairness of decision processes; see Vermunt & Steensma, 2016, Chap. 12 of this handbook), it has been shown that people swiftly withdraw their commitment and their willingness to adhere to social norms if they feel that their opinions and needs are not acknowledged by the authorities who make decisions (Tyler, 2006). And finally, in the domain of *retributive justice* (which deals with the fairness of sanctions and other responses to norm transgressions; see Wenzel & Okimoto, 2016, Chap. 13 of this handbook), it has been found that ordinary people often have very clear opinions about what constitutes "just punishment" in response to norm violations, and whether and why they consider different forms of punishment (such as the death penalty) as more or less "just" (e.g., Ellsworth & Gross, 1994).

These and many other findings suggest that people deeply care about fairness and justice. At this point, one might argue that the finding that people disapprove of being underpaid or being disrespected rather reflects an egoistic motive instead of a justice motive. In fact, many theories that have strongly influenced social justice research are——either explicitly or implicitly——built on the assumption that humans' most fundamental behavioral disposition is to rationally maximize their self-interest. One of the most influential theories in the distributive justice domain, *equitytheory*, may serve as an example. Equity theory (Adams, 1965; Walster, Walster, & Berscheid, 1978) holds that people make social comparisons with regard to "inputs" (e.g., the number of hours they work for their company) and "outputs" (e.g., the salary they receive for their work); equity means an equilibrium state that suggests that their own input-output relation does not differ from the input-output relation of other people. In case of inequity, people strive towards restoring equity, either by reframing the situation or by adjusting their inputs—for

instance, by compensating underpayment with lower job performance (see above). Equity theorists have argued that the aversiveness of negative inequity reflects a rational self-interested concern: an interest in justice for oneself, not an interest in justice as such.

Various scholars have repeatedly challenged the notion of a dominant and singular self-interest motive (e.g., Miller & Ratner, 1998; Montada, 2002; Ratner & Miller, 2001; see also Montada & Maes, 2016, Chap. 6 of this handbook). Accumulating research findings suggest that rational self-interest is a rather narrow explanatory framework for understanding human motivations in general, and some justice-related phenomena in particular, such as:

- The finding that people not only respond to negative inequity (e.g., being underpaid compared to a colleague), but sometimes——albeit to a lesser extent——also to positive inequity. For example, studies have shown that people start working harder when they earn more than they are entitled to or when their status has been increased (e.g., Greenberg, 1982, 1988).
- The finding that people are willing to reject offers from another party if they think this offer is unfair even though rejecting implies that they will not receive anything at all (Güth et al., 1982).
- The finding that people are willing to sacrifice their own resources in order to help restoring justice in the world (such as donating money for the needy, participating in public protests or social movements) even if they do not directly profit from these contributions (Montada & Schneider, 1989; Van Zomeren, Postmes, & Spears, 2008).
- The finding that people are willing to sacrifice their own resources in order to punish norm violators (a phenomenon that has been labeled "altruistic punishment" by behavioral economists; Fehr & Gächter, 2002) even though they will not directly profit from such behavior (see also Sect. 4.3.2).
- The finding that people are capable of experiencing a sense of "empathic concern," that is, feeling distressed by the suffering of another——which, in turn, motivates non-

selfish helping (Batson, Ahmad, & Lishner, 2009).

Of course, one can always construe additional assumptions that can explain each of these findings in line with the notion of a dominant self-interest motive. For example, some researchers have argued that "empathic concern" is not so much a concern for the well-being of another to whom we feel close, but rather a concern for oneself because the other feels so close to oneself (e.g., Cialdini, Brown, Lewis, Luce, & Neuberg, 1997). But the wealth of findings showing that——under certain circumstances——people abandon their immediate self-interest in order to behave in the interests of others also suggests that one single self-interest motive may not be sufficient to explain justice-related behaviors. Or, as Batson and Shaw (1991) have put it, "…at least some of us, to some degree, under some circumstances, are capable of a qualitatively different form of motivation, motivation with an ultimate goal of benefitting someone else" (p. 107). This remark also implies that the extent to which social behavior can be explained by more or less self- vs. other-oriented concerns varies as function of persons and situations (Van Prooijen, 2013). In the psychological justice literature, it is now consensus that the assumption of a universal, primordial "justice" motive is useful, both practically and theoretically (see Ellard, Harvey, & Callan, 2016, Chap. 7 of this handbook). In Sect. 4.3, we will discuss the question why natural selection might have favored the evolution of a "justice" motive in humans.

One particularly important conceptualization of the "justice motive" has been developed by Melvin Lerner. Lerner (1980) understands the justice motive as a need to believe that the world is a just place in which everybody gets what he or she deserves, and everybody deserves what he or she gets. Apart from the question whether such a motive can be considered "ultimately" selfish, other-oriented, or rather a hybrid of both (Montada, 1998), Lerner suggests that the justice motive fulfills an important adaptive function: It adds sense and meaning to what people do (because believing

in a just world is a basis for trusting in the reciprocation of good deeds) and to the things that happen to people (good things happen to good people; bad things happen to bad people). Such a conceptualization of the justice motive can explain both socially undesirable phenomena such as the derogation of innocent victims (Hafer & Bègue, 2005; Lerner & Simmons, 1966) and socially desirable phenomena such as positive future expectancies in uncertain or unfamiliar situations (Correia & Vala, 2004; Dalbert, 2001).

4.2.2 Justice-Related Personality Traits

Batson and Shaw's claim that "…at least some of us, to some degree, under some circumstances" (Batson & Shaw, 1991; p. 107) show "truly" other-oriented behavior implies that the degree to which social behavior can be accounted for by self- vs. other-oriented concerns varies between situations, but also between persons. For example, people reliably differ in the extent to which their behavior in social exchange situations is marked by a desire to maximize their self-interest and/or to maximize the joint outcome of all interaction partners. The respective personality variable has been labeled *social value orientation* (SVO; e.g., Van Lange, 1999). SVO distinguishes between three categories: prosocial, individualistic, and competitive orientations, with the latter two often combined into a "proself" category.

Interestingly, SVO not only predicts people's behaviors in social dilemmas, it also predicts how people *construe* such dilemmas. Prosocials view cooperation as the most rational thing to do, whereas proselfs view non-cooperation as most rational (Van Lange, Liebrand, & Kuhlman, 1990). Moreover, prosocials frame social dilemmas more as a decision between being moral vs. immoral, whereas proselfs frame the same situations more as a decision between being weak/naïve vs. strong/self-assured (the "might versus morality effect"; Liebrand, Jansen, Rijken, & Suhre, 1986). These findings suggest fundamental differences in how people construe justice,

how much value they place on egalitarianism, and how much concern they have for the well-being of others.

More recently, research on people's reactions to procedural injustice (which includes, for instance, denying people the opportunity to "voice" their opinions; see also Sect. 4.3.1) has shown that prosocials are more sensitive to information on whether *other* participants were also given vs. denied "voice," whereas proselfs were only interested in whether *they* had been given vs. denied "voice" (Van Prooijen, Ståhl, Eek, & Van Lange, 2012). These results suggest that different people can perceive and evaluate justice within the same situation very differently, and these individual differences can at least partly be accounted for by stable personality characteristics, such as SVO (see also Balliet, Parks, & Joireman, 2009). To put it more abstractly, one might say that personality *and* situation variables jointly (or interactively) shape people's cognitions, emotions, and behaviors. Acknowledging and investigating the systematic dynamic interactions between persons and situations is important for at least two reasons: First, by investigating such interaction patterns we can learn more about what exactly justice-related personality traits and situational features psychologically signify. Second, by explicitly modeling person × situation interactions, we can explain justice-related behaviors more precisely and more reliably than either personality or situation effects alone could do (Schmitt, Eid, & Maes, 2003; Schmitt & Sabbagh, 2004).

The findings showing that prosocials and proselfs differ in how they construe situations and how they react to contextual information have already illustrated this general principle. Other examples for systematic person × situation interaction effects can be found in the literature on *justice sensitivity* (Schmitt, Gollwitzer, Maes, & Arbach, 2005; Schmitt, Baumert, Gollwitzer, & Maes, 2010; see also Baumert & Schmitt, 2016, Chap. 9 of this handbook). Justice sensitivity reflects how strongly people react to experienced injustice ("victim sensitivity"), to witnessed injustice ("observer sensitivity"), to injustice from which one profits unilaterally ("beneficiary

sensitivity"), and to injustice that one has actively produced ("perpetrator sensitivity"). Notably, the way people respond to certain cues in their social environment depends on their level of justice sensitivity. For instance, people high in *victim sensitivity* respond more strongly to cues indicating that other people might exploit them ("meanness cues"; see Gollwitzer, Rothmund, & Süssenbach, 2013, for a review). This, in turn, can explain why especially victim-sensitive individuals tend to behave antisocially in situations that are marked by uncertainty: When "meanness cues" are present in a situation, victim-sensitive individuals behave egoistically in order avoid being exploited. This theoretical reasoning can explain the otherwise puzzling finding that a personality trait that can be considered an indicator of the justice motive (Schmitt, 1996; Schmitt, Neumann, & Montada, 1995) is associated with unfair behavior in many social situations (Gollwitzer, Schmitt, Schalke, Maes, & Baer, 2005).

Notably, there is a substantial body of research suggesting that the belief in a just world (see Sect. 4.2.2) also varies consistently between people (Furnham, 2003; Rubin & Peplau, 1973): Some people seem to believe more strongly in a just world than others. Whether such individual differences reflect a differential *tendency* to see the world as more or less just or rather a differential *need* to see the world as just is not entirely clear (see Schmitt, 1998). Nonetheless, individual just-world beliefs have been found to correlate with justice judgments in many different domains, such as perceptions that one is, overall, fairly treated by one's peers, teachers, parents, and other authority figures (Dalbert, 2009). Very broadly speaking, it makes sense to assume that just-world beliefs at least partly reflect individual differences in the justice motive, as Lerner conceptualized it.

4.2.3 The "Moral Self"

The reviewed findings on SVO and justice sensitivity have demonstrated that, under certain circumstances, people behave unfairly, uncooperatively, and fully in line with the self-interest model.

On the other hand, fairness and benevolence are strongly inscribed in our cultural guidebook and most people dislike egoists. So one might wonder how egoists ("proselfs" in the language of SVO theory) manage to save face before others and before themselves. A look into research on victim sensitivity may be helpful to answer this question: As noted above, victim-sensitive individuals justify their antisocial behavior by arguing that they would otherwise be exploited (Gollwitzer & Rothmund, 2009), just as proselfs justify their antisocial behavior by arguing that it is the most rational thing to do (Utz, Ouwerkerk, & Van Lange, 2004). Justifications or rationalizations are therefore one way to avoid the cognitive dissonance associated with behaving uncooperatively (Ariely, 2012; Shalvi, Eldar, & Bereby-Meyer, 2012).

The question how people manage to justify social undesirable actions before others and themselves has been addressed by many scholars in social psychology. Daniel Batson, for example, has demonstrated that people often do not practice what they preach——they demand others to behave in morally acceptable ways, but fail to live up to these standards themselves, a phenomenon that he has labeled "moral hypocrisy" (Batson, Kobrynowicz, Dinnerstein, Kampf, & Wilson, 1997; Batson, Thompson, Seuferling, Whitney, & Strongman, 1999). Albert Bandura has coined the term "moral disengagement" to describe strategies that people use to avoid negative self-evaluations (Bandura, 1999, 2002). These strategies involve coming up with moral justifications ("it is alright to beat someone who harms you"), using "sanitizing" or euphemistic language ("Taking someone's bike without asking them is just 'borrowing' it") and advantageous comparisons ("Stealing a little bit of money is nothing compared to those who steal a lot of money"), denying or diffusing responsibility for the harm that is caused ("I am only executing other people's orders"), disregarding or minimizing the injurious effects of one's actions ("Telling lies does not really do any harm"), and attributing blame to or dehumanizing those who have been harmed ("Some people deserve to be treated like animals").

More recent research has broadened the horizon of moral self-regulation (Ayal & Gino, 2012; Monin & Merritt, 2011; Zhong, Liljenquist, & Cain, 2009). For example, it has been shown that inducing people to think of past moral actions makes them less compelled to give for a good cause or to restrain discriminating behaviors in the present (e.g., Jordan, Mullen, & Murnighan, 2011; Sachdeva, Iliev, & Medin, 2009). These findings can be explained in two ways: First, (thinking of) prior good deeds serve as an opportunity to establish *moral credentials* for being moral, prosocial, and unbiased (e.g., Monin & Miller, 2001). Second, good deeds serve as a *moral credit* that can be spent some other time——which implies that people construe morality analogous to a bank account, where good deeds and bad deeds weigh each other out (Effron & Monin, 2010).

The findings on moral hypocrisy, moral disengagement, and moral self-regulation seem to paint a rather dark picture on people's everyday morality: They imply that people are not interested in morality and justice per se, but rather in upholding a favorable view of themselves while, at the same time, willfully giving in to all kinds of immoral temptations. Relating these findings back to research on SVO and victim sensitivity, one might wonder whether justifications for immoral behaviors ("I would be stupid if I had not taken all the money") are merely hollow *post-hoc* excuses for reprehensible actions or rather "true" (and——in principle——socially acceptable) *a priori* concerns that do not necessarily reflect an inherent egoistic motive. Clarifying this issue has kept psychological research on justice and morality busy for decades, and an empirical answer to the question how self-related and other-oriented concerns are related to each other in our daily lives is not really in sight. Nevertheless, it should once again be noted that such findings should not be misunderstood as evidence for a dominant and singular egoism motive. On the contrary: The fact that people are so strongly concerned with issues of morality and justice in their own lives and the lives of others and that they ever so often struggle with finding the right balance between what is "right" and

"wrong" can even be regarded as a strong empirical evidence for the existence of a fundamental, universal concern for justice.

4.3   Interpersonal Dynamics: Justice Between People

Assuming universality of the justice motive implies that concerns about justice originate from innate mental modules, which gradually evolved through natural selection. Indeed, it has been noted that although justice norms vary across cultures, all known cultures develop a justice system with norms about morality (Haidt, 2012). Moreover, many authors emphasized the evolutionary roots of various justice-based motivations such as egalitarianism and reciprocity (e.g., Boehm, 2012; Brosnan & De Waal, 2003; De Waal, 1996; Trivers, 1971; Van Vugt, Hogan, & Kaiser, 2008). Why did the justice motive evolve in humans? To answer this question, we argue that it is important to appreciate the social nature that characterizes the evolutionary history of the human species.

Our prehistoric ancestors banded together in small hunter-gatherer societies for hundreds of thousands of years. Living in such an effectively functioning small group was essential for survival, as the group provided food, shelter, safety, and potential mating partners. Indeed, exclusion from one's tribe effectively boiled down to a death sentence in the pleistocene. As such, establishing positive interpersonal relations and harmonious within-group functioning was of crucial importance. Specifically, group members needed to trust that resources would be shared in ways that were considered acceptable by all; group members needed to cooperate to reach common goals, and relatedly, group leaders needed the legitimacy to coordinate and distribute tasks; group members needed methods to resolve conflicts; and group members needed to feel that their contributions to the group were appreciated by other members of the tribe in order to stimulate reciprocity and maintain a sense of community. All of this put substantial selection pressure on group members' capacity to share a concern

for justice, stipulating that group members may expect to get what they deserve in terms of resources and social standing. Modern human beings thus are genetic descendants of ancestors for whom justice norms were essential to regulate interpersonal relations and within-group functioning (e.g., Boehm, 2012; De Waal, 1996; Van Vugt et al., 2008; see also Talbot, Price, & Brosnan, 2016, Chap. 21 of this handbook).

Although people in modern societies no longer live as hunters and gatherers, we can still see the traces of our ancestral past in the role that justice norms play in how people relate to each other, and how they organize themselves into social groups. Scientists have widely noted that justice is of particular importance for the smooth functioning of interpersonal relations and social groups, as reflected by research that was conducted in the context of organizations, legal settings, classrooms, sports teams, groups of friends, and intimate relations (for overviews, see De Cremer & Tyler, 2005; Tyler & Blader, 2000; Tyler & Lind, 1992; Van den Bos & Lind, 2002). For instance, people generally believe that they should treat each other fairly, as illuminated by the "do-no-harm" principle (Baron, 1995). Moreover, people desire to be treated fairly by others, and this desire largely stems from concerns about one's interpersonal relations: For instance, it has been noted that people interpret unfair treatment as a sign that they have low status within a group (Tyler, 1994; Van Prooijen, Van den Bos, & Wilke, 2002, 2005), are at risk of being excluded (De Cremer, 2002; Tyler, 1987; Van Prooijen, Van den Bos, & Wilke, 2004), and have little reason to trust others (Van den Bos, Wilke, & Lind, 1998).

In sum, justice serves as a tool to regulate interpersonal or within-group relations. In the following, we illuminate the specific functioning of the justice motive in such an interpersonal or within-group context. Specifically, we argue that there are three complementary aspects of justice that help people regulate their interpersonal or within-group relations. First, people need to be able to *assess* justice: How do people establish whether or not they or their fellow group members were fairly or unfairly treated by others?

Second, people need tools to *enforce* justice: What can people do when they believe others treat them unfairly, or when they perceive that group harmony is threatened by a group member who violates justice norms? And third, people need to be able to *restore* justice: How can one restore positive interpersonal relations and within-group harmony following minor infractions, or even following major violations of justice? In the following, we discuss these three aspects of the interpersonal dynamics of justice in turn.

4.3.1 Assessing (In)justice

An important first aspect of regulating and maintaining interpersonal relations is the ability to determine when one is treated fairly or unfairly. People therefore look for various cues in their social environment that inform them how fairly they are treated by other people. In this process, people are particularly sensitive to the perception of injustice, as this directly threatens their well-being and the quality of their interpersonal relations within a community that they value (Baumeister, Bratlavsky, Finkenauer, & Vohs, 2001; Van Prooijen, Van den Bos, Lind, & Wilke, 2006). Specifically, we argue that people experience feelings of injustice when they believe that they are being deprived of a valuable commodity that they feel entitled to, given what comparable others get, or given specific or generic norms of conduct. These valuable commodities can be either material (e.g., money, resources, services) or immaterial (e.g., equality, voice, respect) in nature, but share the propensities that they are considered desirable, and people can feel entitled to them in an interpersonal setting. Although there may be subtle differences in the relevant dynamics that are associated with these various "sources" of injustice (e.g., see Chaps. 11 and 12, this handbook, on distributive and procedural justice), at a more overarching level, both material and immaterial commodities are distributed and valued particularly in the context of interpersonal relationships and share a similar potential to maintain or disrupt the healthy functioning of

those relationships (cf. Cropanzano & Ambrose, 2001).

Early studies focused mostly on material outcomes to investigate how people assess justice (e.g., Stouffer, Suchman, DeVinney, Star, & Williams, 1949). These studies demonstrated the importance of perceived relative deprivation, defined as the feeling that one does not get what one deserves compared to other people or groups (for an overview, see Smith, Pettigrew, Pippin, & Bialosiewicz, 2012). Central in these feelings of relative deprivation is social comparison, which is reflected in various distributive justice theories. As has already been discussed in Sect. 4.2.1, the "equity rule" is frequently used to assess whether material resources are distributed fairly in interpersonal settings.

Besides equity, there are other justice rules that serve a similar purpose, the most notable ones being equality and need (Deutsch, 1975). Whereas equity, which is based on direct reciprocity and social exchange, may be considered desirable in, for instance, work-related settings (where people expect to be rewarded for good performance), equality and need may be considered more desirable in other interpersonal settings. Equality rules dictate that resources are distributed equally regardless of one's relative contributions, which, for instance, may be preferred in close communal relations (e.g., marital partners sharing a household). The principle of need dictates that resources should be distributed to those who need them most, which may be preferred in interactions with people who are unable to acquire their own resources (e.g., sick people, children, elderly). People thus can employ these various distributive justice rules depending on the type of social relationship that one has with each other. At the same time, people often differ in their endorsement of these distributive justice rules, which is a potential source of conflict (e.g., political debates on equality- vs. equity-based income policies). How these various distributive justice norms are applied may therefore be part of a shared moral framework that cohesive groups gradually develop.

During the last three decades, scientists increasingly recognized that people do not assess

justice in interpersonal settings only by considering the distribution of material resources. Inspired by the classic work of Thibaut and Walker (1975), it is now well-established that other cues to assess justice are provided by the *procedures* that group authorities use when making important decisions that affect various group members. When evaluating procedural justice, people sometimes also use social comparisons. For instance, people typically want to be treated the same as others, a procedural justice principle which is referred to as the consistency-between-persons rule (Leventhal, 1980; see Van Prooijen et al., 2006, 2012). But frequently, people assess procedural justice through a variety of criteria that are based on more general norms of conduct. Leventhal (1980) specified a range of procedural justice rules that people use to assess justice in their interpersonal interactions with decision-makers, such as *accuracy* (i.e., decisions must be based on all the relevant information that is available), *bias suppression* (i.e., decision-makers must have no apparent self-interest at stake in a decision), and *ethicality* (i.e., procedures need to be in accordance with common norms and values). The procedural justice principle that presumably has been most widely studied is the principle of "voice" (see also Sect. 4.2.2.): People consider decision-making procedures fairer if they were allowed an opportunity to voice their opinion in this interaction than if people were denied such an opportunity (e.g., Folger, 1977; Van den Bos, 2003; Van Prooijen, 2009).

To some extent, procedural justice principles such as voice can be used to gauge the fairness of outcome distributions. For instance, research reveals that variations in procedural justice particularly influence judgments of distributive justice when people do not know the outcomes of others, and hence lack the information to make a social comparison-based judgment (Van den Bos, Lind, Vermunt, & Wilke, 1997). However, procedural justice also exerts influence on people for reasons beyond the pursuit of material self-interest. The relational and group-engagement models stipulate that people consider group authorities as representative for the entire group, and hence, they interpret the way these authori-

ties treat them as diagnostic for their standing and inclusion in a group (Tyler & Blader, 2003; Tyler & Lind, 1992). Fair interpersonal treatment thus has symbolic value to people as it informs them that they are taken seriously by others and are considered a valuable member of one's community (Lind, Kanfer, & Earley, 1990; Lind & Tyler, 1988; Tyler, 1987).

Consistent with the view that people assess justice to regulate their interpersonal and within-group relations, research has consistently found that procedural justice matters to people particularly when interacting with people with whom they share an identity (e.g., Huo, Smith, Tyler, & Lind, 1996; Tyler, Lind, Ohbuchi, Sugawara, & Huo, 1998). For instance, people are more strongly influenced by the extent to which an ingroup- as opposed to an outgroup-leader treats them with respect, as ingroup-leaders are more relevant sources of information regarding their standing in the group (Smith, Tyler, Huo, Ortiz, & Lind, 1998). In a similar vein, a manipulation of voice vs. no-voice procedures exerts a stronger influence on people who are included vs. not included in a social group (Van Prooijen et al., 2004). These effects are not restricted to interactions with group authorities, but extend to the quality of one's interactions with fellow group members. As a case in point, respect from fellow group members is impactful particularly among members who feel marginalized in a group, as they are most in need of reaffirmation of their belonging to the group (De Cremer, 2002). The importance of these various justice cues for the quality of one's interpersonal relations is further underscored by studies revealing that procedural justice and interpersonal respect influence the extent to which people identify with their group (Blader & Tyler, 2009; De Cremer, Brebels, & Sedikides, 2008; Ellemers, Sleebos, Stam, & De Gilder, 2013; Simon & Stürmer, 2003).

In sum, people continuously assess justice in their interactions with group leaders and fellow group members. Such justice perceptions may both create and resolve conflicts within groups and generally help people to determine their standing and inclusion in a group. Moreover, people assess justice based on various sources of

information, including resource distributions, procedural justice rules, and behaviors that communicate interpersonal respect. Sometimes, however, people may encounter situations in which other group members violate these principles and behave unfairly. In such situations, people may need to enforce justice and restore group norms. This will be discussed in the next section.

4.3.2 Enforcing Justice

It is inevitable that people sometimes are confronted with offenders who selfishly acquire resources through illegitimate means, bring harm upon others, or otherwise show little respect for the basic rights of others. In such cases, most people feel that the most appropriate course of action is to punish the offender. It has been noted that one of the main reasons why people seek punishment is to restore a sense of justice. Carlsmith, Darley, and Robinson (2002) examined why people punish offenders and distinguished between the backward-looking, retributive motivation to restore a sense of justice ("just deserts") vs. the forward-looking, utilitarian motivation to prevent further harm from occurring (e.g., by deterring potential future offenders, or by incapacitating dangerous offenders in that they cannot commit more harm). Results suggest that punishment is mainly motivated by just deserts considerations, and less so by utilitarian motivations. Moreover, an important predictor of punishment was people's moral emotions ("moral outrage"). Similar findings emerged in various other studies (for an overview, see Carlsmith & Darley, 2008, see also Chaps. 13 and 14, this handbook, on retributive and restorative justice).

These findings have led scholars to assume that utilitarian considerations are less important in people's motivations to punish offenders than a retributive, justice-driven motivation. For instance, Darley and Pittman (2003) even concluded that utilitarian motives are a "happy by-product" of punishment, and that people primarily punish to make sure that offenders get their just deserts. Indeed, people can use utilitarian arguments to justify rather controversial means to

enforce justice, such as harsh interrogation techniques in the case of terrorism suspects (Carlsmith & Sood, 2009). More generally, it has been noted that moral judgments originate intuitively, and that rational arguments merely serve to justify these intuitions (Haidt, 2012). But from a more distal, evolutionary point of view, one might argue that both just deserts and utilitarian motives are part of the picture why humans developed punishment systems to enforce justice. For hunter-gatherer societies to function effectively, it was necessary to install mechanisms to deter potential offenders and to protect the group from disloyal members who threatened the social order. It stands to reason that, over the course of many generations, these means to enforce justice developed as part of people's intuitive psychology, but only because it was functional for the survival of the group. Put differently, due to its utilitarian implications, groups that managed to enforce justice effectively were more likely to thrive than groups that did not manage to enforce justice effectively.

This line of reasoning would suggest that (1) punishment is driven by social motivations, such as to maintain good interpersonal relations in the group and to protect the group from dangerous or selfish individuals; and that (2) the presence of a punishment system has largely beneficial consequences for the functioning of social groups. Empirical research examined both corollaries. As to the first corollary, various studies support the view that people are most strongly concerned about offenders in a within-group setting. For instance, a study by Gollwitzer and Bücklein (2007) reveals that when people are primed with the *social self* ("We")—the part of the self-concept that emphasizes similarity and assimilation with others—people are more strongly inclined to punish an offender than when they are primed with the *individual self* ("I")—the part of the self-concept that emphasizes individual uniqueness and differentiation from others. Furthermore, when confronted with a guilty offender, perceivers often are more punitive when that offender is part of one's ingroup than when the offender belongs to an outgroup (cf. the "Black Sheep Effect"; Gollwitzer & Keller, 2010; Kerr, Hymes, Anderson, & Weathers,

1995; Van Prooijen, 2006). These findings are consistent with the idea that punishment of offenders matters most in within-group relations.

The social nature of punishment is further underscored by research illuminating the sacrifices that people are willing to make to enforce justice. In a classic study by Kahneman, Knetsch, and Thaler (1986), participants were confronted with an unknown offender who had harmed an unknown victim. Participants subsequently had to choose between varying amounts of money that they had to share with either the offender or the victim. Results revealed that participants were willing to accept smaller amounts if that enabled them to share the money with the victim instead of the offender. Subsequent research indeed confirms that people are willing to pay in order to punish an unknown offender (Turillo, Folger, Lavelle, Umphress, & Gee, 2002). This suggests that punishment frequently is a prosocial act, as people endorse punishment even when it harms the immediate financial self-interest.

Such "altruistic punishment" (i.e., costly punishment) has been operationalized in social dilemma research that tested the second corollary, namely that the presence of a punishment system is beneficial for the functioning of social groups. Notably, Fehr and Gächter (2002) investigated the influence of altruistic punishment on cooperation in small groups of people playing multiple rounds of a public good dilemma. In this public good dilemma, participants could contribute Money Units (MUs) to a common pool. The researchers varied whether or not participants could punish their fellow group members by subtracting three MUs from the free-rider's assets. Such punishment, however, would cost the punisher one MU. Results revealed that cooperation was substantially higher when altruistic punishment was possible than when altruistic punishment was impossible. Moreover, this finding was mediated by feelings of anger, which is consistent with the view that although punishment motivation may originate from intuitive or emotional mental processes, it is nevertheless functional to make a group more effective. A meta-analysis confirms that in most social situations, punishment systems have a positive influence on cooperation and reciprocity (Balliet, Mulder, & Van Lange, 2011). The existence of a punishment system thus indeed improves the functioning of social groups.

4.3.3 Restoring Justice

Besides methods to enforce justice, interpersonal relationships and social groups also need methods to restore a sense of justice following transgressions. Such justice restoration can take on various forms, including repairing the harm that was done to the victim, as well as forgiving the offender. Such efforts at restoring justice are necessary to facilitate reconciliation after conflict, in order to prevent the relationship or group from disintegrating. Research indeed suggests that people attach more importance to compensating victims to the extent that they feel emotionally close to the victim (Leliveld, Van Dijk, & Van Beest, 2012; Van Prooijen, 2010). Furthermore, the willingness to forgive offenders has been found to be an important ingredient in personal well-being and the healthy functioning of interpersonal relationships (e.g., Karremans & Van Lange, 2004; Karremans, Van Lange, Ouwerkerk, & Kluwer, 2003; McCullough, Worthington, & Rachal, 1997; Tsang, McCullough, & Fincham, 2006). Moreover, people are more likely to forgive to the extent that they consider their relationship with the offender more valuable (Burnette, McCullough, Van Tongeren, & Davis, 2012).

At the same time, trying to reconcile following violations of justice often may be difficult. Indeed, it has been noted that people's primary urge following a transgression is punitive or vindictive, and that reconciliatory efforts constitute a transformation of motivations following this initial punitive tendency (McCullough, Fincham, & Tsang, 2003; Yovetich & Rusbult, 1994). Moreover, it has been noted that people have a strong tendency to blame innocent victims for their fate (Lerner, 1980; See also Hafer & Bègue, 2005; Van Prooijen & Van den Bos, 2009). For restoration of justice to occur, people must hence override some of their less constructive intuitions and behavioral tendencies.

Both restoring the harm done to the victim and reconciliation with the offender are focal concerns of research on restorative justice. This research proposes interventions to establish restorative justice as an alternative to the more common court-based punishment in response to criminal offenders (e.g., Wenzel, Okimoto, Feather, & Platow, 2008, see also Cohen, 2016, Chap. 14 of this handbook). A typical restorative justice intervention involves a bilateral discussion between the offender and a victim that is designed to develop a shared understanding of the offense that was committed. In this discussion, both sides get a chance to express their thoughts and feelings regarding the offense. The offender is encouraged to apologize to the victim; the victim is encouraged to forgive the offender; and, both parties determine the most suitable way to both punish the offender and compensate the victim. Wenzel, Okimoto, Feather, and Platow (2010) noted that a preference for such restorative justice interventions originates from different motives than straightforward retribution (i.e., punishment): Whereas disempowering the offender is a dominant motivation to seek retribution, reaffirming the validity of shared values is a dominant motivation to seek restoration. By reaffirming the validity of shared values, restorative justice may be particularly well-suited to restore harmony in an interpersonal relation or group. Indeed, people prefer restorative justice over retributive justice when they share an identity with the offender (Wenzel et al., 2010).

It stands to reason that compensating victims is commonly conceived of as a way to restore a sense of justice. After all, such compensation may acknowledge that the victimization was indeed an injustice; it may repair the harm that was done to the victim (at least to some extent), and it may reaffirm the victim as a valuable group member (e.g., Darley & Pittman, 2003; Lotz, Okimoto, Schlösser, & Fetchenhauer, 2011; Okimoto, 2008). But how is forgiveness related to justice? After all, a central conceptualization of justice is punishment, which at first glance seems antithetical to forgiveness. Retribution is, however, one possible justice motive out of a wider range of justice motives. Justice can also involve values such as empathy, benevolence, and altruism, suggesting a positive association with forgiveness.

A study by Karremans and Van Lange (2005) tested whether activating a justice motivation would increase or decrease people's inclination to forgive an offender. Across three studies, results revealed that activation of justice increased forgiveness. This finding suggests that forgiveness indeed is a result of people's concern to establish a sense of justice. Furthermore, a study by Strelan and Van Prooijen (2013) reveals that punishment and forgiveness are less antithetical than is sometimes assumed. In fact, results indicated that the information that an offender got his or her just deserts through punishment *increased* the likelihood that people subsequently were willing to forgive an offender. This effect was mediated by the belief that justice has been restored. Punishment may thus be an important element in the process towards reconciliation and justice restoration (see also Gromet & Darley, 2006). In fact, even interpersonal revenge can be effective in restoring justice to the extent that the target of the vengeful action understood why revenge has been taken against him or her (Gollwitzer & Denzler, 2009; Gollwitzer, Meder, & Schmitt, 2011). In other words, punishment and revenge serve a communicative function, and re-establishing justice may be conducive to promote forgiveness in interpersonal relations.

It can be concluded that, besides assessing and enforcing justice, restoring justice is essential for the maintenance and healthy functioning of interpersonal relations or groups. Such relations benefit from fair treatment of victimized group members by communicating their value to the group. In fact, even non-victimized group members' commitment to and displayed effort for the group is influenced by the extent to which they believe ingroup-victims are fairly treated by group authorities (e.g., see work on layoff survivor's reactions to the way managers treat layoff victims; Brockner, DeWitt, Grover, & Reed, 1990). Furthermore, interpersonal relations and groups sometimes benefit from forgiveness of

offenders. Indeed, forgiveness is an element of the "tit-for-tat" strategy in social dilemmas, which is most effective in establishing cooperation in prolonged interactions (Axelrod & Hamilton, 1981). However, it must be noted that such forgiveness may only be healthy for group functioning under certain conditions. To illuminate this, Burnette et al. (2012) found that people endorse forgiveness mainly for offenders who have high relational value, but who also are low in perceived exploitation risk. This underscores that forgiveness is only functional to the group if there is trust that the offender is unlikely to offend again.

4.4 Intergroup Dynamics: Justice Between Groups

Whereas the dynamics outlined above suggest that people have rather sophisticated mechanisms at their disposal to psychologically establish and maintain a sense of justice in their interpersonal relations and within their groups, throughout history people have committed major injustices particularly to members of *other* groups. Instances of genocide, hate crime, and discrimination occurred in all eras and illuminate the dark side of human nature. Moreover, these actions typically have a group-based element as they are usually targeted against a marginalized minority group in society. Contrary to the popular view that such injustices are exclusive to a limited number of sociopaths, it has been noted that normal people, without mental disorder, are capable of the most horrendous atrocities against members of other groups (e.g., Arendt, 1963; Baumeister, 1997; Zimbardo, 2008). This suggests that the psychology of justice contains specific and important dynamics at an intergroup level of analysis. In the following, we seek to illuminate the intergroup dynamics of justice. Specifically, we examine what leads people to commit injustices to members of other groups. In addition, we examine people's responses to perceived group-based injustices.

4.4.1 Committing Injustice to Outgroup Members

Even when people have high standards of justice in the way that they treat members of their own group, this does not automatically mean that people always apply these standards to how they treat members of others groups. This idea is highlighted in theorizing on moral exclusion (Opotow, 1990), which states that people categorize other living entities (i.e., animals and fellow human beings) in terms of the "scope of justice"—that is, a mental classification of the extent to which justice norms apply to another social entity (see also the "circle of moral regard"; Reed & Aquino, 2003). Individuals (or outgroups) who fall inside a perceiver's scope of justice are considered worthy of fair and respectful treatment; but when individuals fall outside of a perceiver's scope of justice, justice norms are not considered relevant when interacting with that individual. As a consequence, the perceiver may believe that harming the individual who falls outside the scope of justice is not immoral and sometimes even appropriate or desirable.

This scope of justice should be regarded as a continuous mental scale instead of a strict dichotomy, as living entities may differ in the level of moral treatment that the perceiver accords to them (to illuminate this, dogs usually do not have the same rights as humans; but many people find the killing of a dog immoral, yet are perfectly comfortable killing an insect). Moreover, the scope of justice is not static: Subtle contextual cues influence the number of entities that people are willing to include in their scope of justice (Laham, 2009). For instance, a highly self-important moral identity was found to increase the number of outgroups that perceivers place in their circle of moral regard, as reflected in the amount of harm that one considers acceptable towards outgroups (Reed & Aquino, 2003).

For most outgroups that people normally encounter in their daily lives, these processes do not manifest themselves to an extreme extent (e.g., people rarely feel that it is morally appro-

priate to injure or kill members of a rival organization, university, or soccer team). Still, with the right measurement tools, the process of moral exclusion can be observed even in normal, everyday life encounters with members from other groups. For instance, research on infrahumanization often compares people's perceptions of the extent to which ingroup vs. outgroup members are capable of experiencing a range of emotions (e.g., Haslam, 2015; Leyens et al., 2000). In this research domain, a distinction is made between primary emotions (i.e., emotions that are not uniquely human, but are likely also experienced by other animals, such as anger and fear) and secondary emotions (i.e., emotions that are assumed to be uniquely human, such as pity and regret). Infrahumanization research typically finds that people accord primary emotions to both ingroup and outgroup members, but accord secondary emotions more to ingroup than to outgroup members. Thus, ingroup members are perceived as more capable of experiencing typically human emotions, making them more prototypically human. This, in turn, influences discrimination in the prosocial treatment of ingroup vs. outgroup members (Vaes, Paladino, Castelli, Leyens, & Giovannazzi, 2003).

People thus do not treat outgroup members with the same moral standards as they treat ingroup members. This has substantial implications for what people consider to be fair in intergroup situations. Whereas people are guided by norms about equity, equality, and need when distributing resources within groups, people seem to be mainly concerned with favoring their ingroup when distributing resources between groups. The classic work by Tajfel (1970) on ingroup favoritism reveals that, even in a minimal intergroup setting, people allocate more valuable points to other ingroup members than to outgroup members. More generally, it has been noted that groups behave more competitively in mixed-motive situations than individuals do, a finding referred to as the interindividual-intergroup discontinuity effect (Wildschut, Pinter, Vevea, Insko, & Schopler, 2003). It is likely that there is a moral dimension to this tendency to favor one's own group at the expense of other groups. Instead

of principles such as equality, reciprocity, and fairness, at the group level justice may be defined by norms to favor the ingroup. For instance, a study by Pinter et al. (2007) reveals that group leaders scoring high on guilt proneness—an emotion that signifies moral motivation—are more strongly inclined to display ingroup favoritism than group leaders scoring low on guilt proneness, provided that they are accountable towards the ingroup. This suggests that people's inclinations to favor their ingroup at the expense of outgroups are, quite paradoxically, driven by justice-based motivations.

The finding that people are predisposed to favor their ingroup can be observed in various other, related lines of research. For instance, research on parochial altruism reveals that people are willing to invest their own resources in costly punishment in order to both support the well-being of members of their own ingroup and protect against threats embodied by a rival outgroup (Bernhard, Fischbacher, & Fehr, 2006). Furthermore, research on punishment of ingroup vs. outgroup offenders finds that people punish an ingroup offender more severely when guilt is certain, but they punish an outgroup offender more severely when guilt is uncertain (Kerr et al., 1995; Van Prooijen, 2006). An alternative way of formulating this conclusion is that certainty of guilt matters more for punishment in the case of ingroup compared to outgroup offenders, suggesting that people are relatively more indifferent about the extent that justice is done towards outgroup members. Likewise, it has been found that people offer more procedural protections to ingroup than to outgroup crime suspects (Boeckmann & Tyler, 1997).

Moreover, punishment is sometimes driven by negative stereotypes that one has about a rival outgroup. It has been noted that when an offender belongs to a societal outgroup that is stereotypically associated with crime, people use these stereotypes heuristically, leading them to punish this outgroup offender more severely than they would punish an ingroup or non-stereotyped outgroup offender (e.g., Bodenhausen & Wyer, 1985; Sweeney & Haney, 1992). Such defensive responses to criminal stereotypes are in line with

a more general notion that the processes of moral exclusion and ingroup favoritism might be particularly noticeable when people are confronted with an outgroup that is considered threatening. Intergroup threat generally has been defined in terms of situations where "one group's actions, beliefs, or characteristics challenge the goal attainment or well-being of another group" (Riek, Mania, & Gaertner, 2006; p. 336). These perceptions of threat can take on many forms, such as competition over existing recourses (cf. realistic group conflict theory; Sherif & Sherif, 1969), conflicting cultural values (Sears, 1988), and intergroup anxiety (Stephan & Stephan, 2000). According to Riek et al. (2006), intergroup threat is a strong predictor of, for instance, intergroup prejudice, hostility, and anxiety, which may lay the foundations for violence and injustice.

An illustration of how such intergroup threat may fuel intergroup hostility is provided by research on "sacred values" in the context of the Israeli-Palestinian conflict (e.g., Atran, Axelrod, & Davis, 2007). These sacred values represent values that are considered to be absolute, inviolable, and that require complete devotion (examples of such sacred values are the well-being of one's family, or religious devotion). Intergroup conflict is particularly likely to escalate when the other group poses a direct threat to one's sacred values, or when both groups have sacred values that are mutually incompatible (e.g., the sacred status of Jerusalem in both Judaism and Islam). Such intergroup conflict resulting from sacred values may be particularly difficult to resolve. For instance, a study by Ginges, Atran, Medin, and Shikaki (2007) indicates that offering material incentives to compromise over sacred values only backfires and leads to an exacerbation of the conflict. This finding is explained by the assertion that people find the offer of a material exchange offensive in the context of values that are considered too sacred to comprise on (see also the work on "taboo trade-offs"; Tetlock, Kristel, Elson, Green, & Lerner, 2000). The only intervention that, in the study by Ginges et al. (2007), did reduce intergroup hostility was the perception that the other group is also willing to make a symbolic compromise over one of their own sacred values.

In sum, various basic psychological processes facilitate injustices in an intergroup context. This, however, should not be taken as evidence that humanity is facing an impossible challenge in reducing intergroup hostility, terrorism, genocide, and war. As noted previously, the scope of justice is not static (e.g., Laham, 2009), and group members frequently may realize at some point that their past actions against another group constituted an injustice. Such realization may cause feelings of collective guilt, even decades after a historic injustice, among a generation that was not involved in the event (Doosje, Branscombe, Spears, & Manstead, 1998). Moreover—and contrary to popular belief—data reveals that intergroup violence has gradually declined throughout the ages, and that the last 50 years constituted the most peaceful era in the history of humanity (Pinker, 2011). As such, recognizing intergroup injustice and promoting social change constitutes a forceful part of human psychology that counteracts the dynamics leading to intergroup injustice. In the next section, we examine how people respond to perceived injustices towards their group, and briefly note some of the actions that may drive social change.

4.4.2 Responding to Intergroup Injustice

Although recognizing severe intergroup injustice can be evident for the victimized group, in many cases intergroup injustice may manifest itself in more subtle ways. For instance, members of specific societal groups may be discriminated against through implicit mental processes, and specific discriminatory outcomes—for instance, not getting a job because of one's race or gender—frequently can be attributed to other causes (e.g., the job qualification of competing candidates). As a case in point, it has been noted that many underpaid women see that women as a group are being underpaid, but they typically do not see that they themselves are being underpaid (Crosby, 1982). There is thus a discrepancy between personally

experienced injustice (cf. relative deprivation) vs. group-based experienced injustice (i.e., fraternal deprivation). Whereas relative deprivation involves a fairness judgment that is based on a comparison of one's own outcomes vs. the outcomes of a referent other individual, fraternal deprivation involves a fairness judgment that is based on a comparison of one's group's outcomes vs. the outcomes of a referent other group. Fraternal deprivation thus entails a sense of collective disadvantage (Runciman, 1966). People are particularly likely to detect fraternal deprivation when they define the self and their experiences in group-based terms (Tyler, Boeckmann, Smith, & Huo, 1997).

Once people detect that their ingroup is the victim of fraternal deprivation, a common response for them is to strive for social change. A typical response to change the status quo is to mobilize the ingroup and protest against the illegitimate social inequality that they believe their group is facing. Indeed, it has been noted that collective action is driven by three complementary processes (Van Zomeren et al., 2008). First, people indeed need to believe that a particular societal group is victim of an *injustice*, resulting in feelings of anger. Second, people need to share an *identity* with the deprived societal group, and hence be motivated to actively pursue change. And third, there needs to be a sense of *efficacy*: People need to believe that their collective action tendencies can potentially be successful in restoring equality. The combination of these three factors mobilizes a group to come into action against the perceived fraternal deprivations. Sometimes such collective action can indeed be highly effective, as the 2011 uprisings in the Arab world illustrate.

In addition, social change can be stimulated through policy interventions. A well-known example of such an intervention constitutes affirmative action programs, where members of marginalized groups in society (e.g., ethnic minorities; women) are given preferential treatment in application procedures. Such programs are designed to increase the diversity in organizations that are traditionally dominated by a majority group (e.g., White males). Affirmative action programs are a topic of substantial debate from a justice-based perspective. Proponents point to the existence of racial and sexual discrimination even in today's society and construe affirmative action as a necessary tool to create opportunities that are truly equal (Crosby, Iyer, & Sincharoen, 2006). Opponents, however, typically point out that affirmative action violates principles of meritocracy, dictating that the most capable individuals should be promoted or hired. Although sometimes dismissed as rationalization of one's prejudiced attitudes, research suggests that opposition against affirmative action can be genuinely based on the belief that principles of justice are violated (Bobocel, Son Hing, Davey, Stanley, & Zanna, 1998). Moreover, research suggests that affirmative action programs can have negative side-effects, as people tend to perceive employees who were hired based on such programs as relatively more incompetent (Heilman, Block, & Lucas, 1992). This debate notwithstanding, initiatives such as affirmative action programs illustrate that many people are concerned about injustice against minority groups and actively look for ways to ensure justice between social groups.

Although human psychology offers a strong potential for intergroup conflict, as well as for rationalization processes to justify harming others, human psychology also has an undeniable drive to extend principles of justice, benevolence, and altruism to members of other groups. Collective action and policy interventions sometimes may be necessary steps towards social change. True social change, however, happens in the minds of perceivers as they expand the scope of justice to incorporate an increasing number of outgroups.

4.5   Conclusion

This chapter was designed to give a contemporary overview of the psychology of justice. We have described how justice can be conceptualized as a unique, primordial motive that is distinguishable from other human motives (e.g., self-interest) and that evolved through the evolutionary

process of natural selection. Moreover, we have summarized the psychology of justice at three complementary levels of analysis: The intra-individual level, stipulating how justice can differ between persons, and how people are motivated to perceive themselves as a fair and moral person; the interpersonal level, stipulating how people use justice to regulate the functioning of important interpersonal relations or groups; and the intergroup level, stipulating why people commit injustice to other groups, as well as how people respond to (and restore) such between-group injustice. What is striking about the research summarized here is how justice seems to matter at all these levels of analysis, not only in terms of how people perceive, respond, and behave towards others, but also in terms of how people prefer to perceive and present themselves. A concern for justice thus seems deeply engraved in human psychology.

The various levels of analysis that we described in this chapter also illuminate the unique contribution that psychology has to offer to understand justice judgments. Whereas other disciplines either focus on "objective" justice (philosophy; e.g., Rawls, 1971), or on more macro-level conceptualizations of justice (e.g., sociology, economy), psychology focuses on how individual persons—due to their own unique personality, the specific features of the situation that they find themselves in, and all the perceptual or self-serving biases that may color their judgment—subjectively construe justice and use these justice judgments as a moral compass guiding their behavior in the social world. The insights derived from the psychology of justice are strongly connected to the insights obtained by other disciplines, of course, as subjective justice judgments provide impetus to broader societal developments, as well as to policy aimed at establishing a more just society. Scientific understanding of justice-based processes may hence be furthered by increased interdisciplinary collaborations that integrate the various contributions that are made within the social sciences on this important topic. We conclude that the psychology of justice is part and parcel of the fabric of social life and an undeniable force driving human behavior all over the world.

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The Economics of Justice

5

James Konow and Lars Schwettmann

… the concept of social justice is strictly empty and meaningless…

F. A. Hayek (1973), *Law, Legislation and Liberty*, Volume 2, pg. 68.

5.1 Introduction

For much of the twentieth century, these words of the libertarian economist and Nobel laureate Friedrich von Hayek were likely an accurate reflection of the sentiments of most mainstream economists (even of the large majority who were not libertarian). The model of *homoeconomicus*—the rational and self-interested man—dominated most theoretical and empirical economic analysis, contributing to the perception among economists and non-economists alike that the "dismal science" did not concern itself with justice, or matters of morality, in general. As a point of fact, however, economics as a discipline was developed by important contributors to moral philosophy, including Smith (1759/1809) and Mill (1861/1979). Nevertheless, justice was relegated to a corner space in economics during most of

the twentieth century. This started to change, though, when results of monetarily incentivized economics experiments began emerging about three decades ago that cast doubt on the mostly dismissive stance of the discipline to date. Justice now occupies a prominent place in theoretical and empirical economic research.

To understand better the results in this chapter as well as our strategy, a very brief review of the trajectory of justice research in economics is helpful. In reality, there have been two research agendas on justice in economics that have, for the most part, been carried out independently. These two research programs correspond to a strong distinction that most economists advocate between descriptive and prescriptive analysis. What economists call *positive* economics is descriptive and concerns what "is," whereas what they call *normative* economics is prescriptive and concerns what "ought to be." The above-mentioned experimental findings have mostly had an impact on the descriptive branch of economics, which accounts by far for the largest volume of economic research, and have prompted formal descriptive theories and further empirical studies. These belong to the field of "behavioral economics," which draws insights from other social sciences, especially psychology. The smaller prescriptive branch of economics, on the other hand, retained a more continuous interest in justice throughout this period, even while its effect on mainstream

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economics was more limited. Most research in this branch remained strictly theoretical until the advent of "empirical social choice," which set out to test prescriptive theories about social (i.e., collective) choice, mostly with the use of self-reported surveys (see Gaertner & Schokkaert, 2012, for an overview).

Our aim is to review important contributions to justice research in economics with an emphasis on different empirical findings that bear on leading theories of justice. Thus, we consider evidence from both incentivized economics experiments and self-reported surveys and their relation to justice theories that have been treated in both the descriptive and prescriptive branches of economics. One further point of clarification: we interpret justice as being about distributive moral preferences and choose this level of specificity for several reasons. Distributive justice represents a large literature, but it is not so broad as to be intractable. In addition, we are aware of flexibility in the use of justice terminology, but we believe this definition corresponds closely to both everyday usage as well as the usual understanding of fairness or justice in the economics literature. It does, however, neglect other important moral preferences that occasionally have been labeled as fairness. For example, we leave aside *unconditional altruism*, i.e., a pure desire to help others not predicated on any norm (e.g., Andreoni, 1989; Becker, 1974), and *reciprocity*, i.e., preferences to reward kindness or punish unkindness, apart from purely distributive motives (e.g., Berg, Dickhaut, & McCabe, 1995; Cox, 2004; Fehr, Kirchsteiger, & Riedl, 1993; Rabin, 1993). Nevertheless, we will have a few words to say about the latter in the conclusions.

This chapter is organized as follows. Section 5.2 presents theories of and evidence on first equality, then efficiency and finally approaches that combine both equality and efficiency. Equity (or proportionality) and desert (or merit) are the topics of Sect. 5.3. Section 5.4 treats pluralistic approaches to justice and the effects of context on justice evaluation. Section 5.5 addresses theories and evidence of the relationship between fairness and risk-taking, and Sect. 5.6 concludes.

5.2 Equality and Efficiency

Equality is probably the oldest notion of justice. In economics, however, the primary distributive standard is that of efficiency. In this section, we consider various theories of equality and efficiency that have figured prominently in economics.

5.2.1 Equality

Arguably, the event most responsible for spurring widespread interest in, and ultimately acceptance of, justice in economics was the publication in 1982 of the results of an experimental test of the so-called "ultimatum game" (Güth et al., 1982). In the canonical version, a "proposer" is provisionally endowed with a sum of money and can offer to share any amount of the endowment with an anonymous counterpart called the "responder." The responder can then accept the offer, in which case the sum is split as proposed, or reject, in which case both proposer and responder receive nothing. Since this situation involves strategic interaction, economists apply game theory, which, combined with the standard economic assumption of rational self-interest, predicts that the responder will accept the smallest offer possible, say 1 cent, since it is better than nothing (and he cares only about his own payoff, and not anything else like fairness). Anticipating this, the rational and self-interested proposer will, in order to maximize his own payoff, offer only 1 cent. Of course, the behavior of actual subjects in this experiment largely repudiated this prediction with frequent offers of one-half and meager offers often being rejected by responders. This experiment, and many variations on it, has been replicated by economists and others countless times. Reviews of these studies, such as Bowles (2004) and Camerer (2003), report that modal and median ultimatum offers are usually 40–50 % of the endowment, and mean offers are regularly between 30 and 40 %. Such offers are rarely rejected, whereas those below 20 % are rejected by about 50 % of responders.

The incidence of high offers and rejections of low offers led to suspicions of a concern for

fairness. In particular, the frequency of equal splits has often been attributed to a preference for equality. Nevertheless, as further reflection and subsequent experimental findings revealed, other motives are likely at work. For example, in the ultimatum experiment of Blount (1995), offers in one treatment were selected by a random device, and the rejection rate was significantly lower than in a standard treatment where offers were chosen by people. This result, combined with evidence from other experiments, suggests a distinct reciprocal motive. That is, apart from a possible concern for the unfairness of the outcome (e.g., seen in the random treatment), people additionally display a preference for rewarding or punishing the presumed good or bad intentions, respectively, of others (e.g., seen in the higher rejection rates when low offers are made by real people).

Indeed, even more motives are potentially implicated in the ultimatum game. For example, proposers might also be motivated by altruism, i.e., an unconditional concern for the payoff of the counterpart that does not depend on equal splits or some other standard. Seemingly generous proposer offers might also be motivated by self-interest: for example, even if a proposer does not care about the respondent's payoff, the former might still make a generous offer due to fear that the respondent does care about fairness and will, therefore, reject a low offer. At least some proposer generosity does, in fact, seem to be selfishly motivated, as suggested by the results of the "dictator game" (Kahneman, Knetsch, & Thaler, 1986). In this design, proposers (here called "dictators") make offers, but responders (here called "recipients") have no recourse and must accept whatever the dictator offers. Forsythe, Horrowitz, Savin, and Sefton (1994) find mean offers of about 20 % in the dictator game, significantly lower than those in the ultimatum game and consistent with the interpretation that proposers in the ultimatum game are motivated, at least in part, by a selfish concern that meager offers will be rejected. On the other hand, mean dictator offers are positive and only about 20 % of dictators take the entire endowment, indicating a concern for the payoffs of their counterparts. Moreover, the frequency of equal splits in dicta-

tor games suggests many subjects value equality (see Camerer, 2003).

Results such as these have led to formal theoretical models in behavioral economics that incorporate both self-interest, captured as a concern for one's own material payoffs, and inequality aversion, formulated as a dislike (or, as economists express it, "disutility") for allocations that deviate from equal splits. One prominent model is that of Fehr and Schmidt (1999), which assumes people dislike disadvantageous inequality, i.e., receiving less than equal splits, more than they dislike advantageous inequality, i.e., receiving more than one-half. It also allows for individuals to differ in their degree of self-interest and inequality aversion. The Fehr-Schmidt model can be nicely reconciled with the pattern of results from various economics experiments, including with proposer offers and responder rejections in the ultimatum game. Nevertheless, it is inconsistent with the frequently observed offers between zero and one-half in the dictator game due to the particular linear functional form of the model. Moreover, Blanco, Engelmann, and Normann (2011) assessed the predictive power of the Fehr-Schmidt model using a within-subjects design, in which individuals participated in a series of different experiments, including an ultimatum game and a modified dictator game. They found that the model predicts the results of different experiments fairly well, but that it does not fit well with decisions at the individual level: individual preferences are not very consistent across different experiments.

Bolton and Ockenfels (2000) developed a rather similar model whereby inequality aversion arises from differences in one's own payoff relative to the average payoff of all other agents. In contrast to the Fehr-Schmidt model, the functional form of this model makes it consistent with dictator offers between zero and one-half, but it does not fit the frequently observed offers of exactly one-half in many designs, including in the dictator and ultimatum games. The model of Konow (2000) has a more general functional form and is consistent with both types of results, but it rests on rather strong assumptions about

individual differences in inequality aversion.[1] Alternately, in the model of Andreoni and Bernheim (2009), dictators are motivated not necessarily by fairness but by a desire to be perceived by others as fair. Along similar lines, Dana, Weber, and Kuang (2007) report experimental results that seem consistent with a desire to avoid appearing unfair, either to others or to oneself. Subjects could choose to make the effects of their choices on payment outcomes uncertain, either to themselves or to others. The authors found that dictators gave significantly less, if they could disguise the effects of their choices. Similarly, Bartling and Fischbacher (2012) conducted an experiment in which dictators could either choose an allocation between themselves and a recipient or could allocate the decision to a third party, who could be relied upon usually to choose the unfair allocation in the dictator's favor. Most dictators delegated the decision and recipients, who were given an unfair allocation and were able to punish, targeted mostly the delegated parties rather than the dictators.

The potential confounds of ultimatum games have led to increased reliance on the dictator game (see Camerer, 2003 and Engel, 2011, for reviews). But the dictator game is vulnerable to criticism based on the sensitivity of subject behavior to variation in the experimental design. For example, Hoffman, McCabe, and Smith (1996) found that modifications in the experimental procedures, such as changes in wording or variation in the level of subject anonymity, caused large and significant changes in dictator generosity, which they attributed to differences in social distance. Other researchers have found that, if the choice set also includes the option of taking away money from another person, the share of positive transfers drops dramatically (for example, Bardsley, 2008; Cappelen, Nielsen, Sørensen, Tungodden, & Tyran, 2013; List, 2007).

The question is whether, and to what extent, such variation reflects experimental artifacts as opposed to the effects of genuine moral and other concerns of people that are being captured in the laboratory. Tammi (2013) argues that the social context and the type of recipient are frames that trigger social norms subjects are habituated to use in their everyday life. While advising caution in drawing conclusions from experiments for social preferences outside the laboratory, Levitt and List (2007) state that variation "does not necessarily imply that preferences are labile. Rather, we view such data as evidence that when critical elements of the situation change, behavior will respond in predictable ways" (p. 164). Although he considers social context important to inferring fairness motives, Konow (2001, 2003) argues that the equal splits frequently observed in the laboratory are often experimental artifacts: equality is chosen by default in many experiments, since most are contextually very lean, but the addition of real-world context usually draws subjects away from equal splits. Thus, impartial parties informed of relevant particulars do not usually choose equality, but there is a positive preference for equality among people who stand in personal relationships to one another, i.e., who are partial rather than impartial (see Konow, Saijo, & Akai, 2009).

5.2.2 Efficiency

Although economists have traditionally been wary of ideas going under the label "justice," they have warmly embraced concepts of efficiency. Efficiency is usually the only prescriptive criterion taught in undergraduate economics classes and routinely appearing in economic policy analyses. Economists think of efficiency as distinct from, and even at odds with, fairness or equity, sometimes referring to an "efficiency-equity trade-off." The evidence discussed in this section reveals that efficiency is a distributive preference shared by people other than economists, and therefore, is the subject matter of distributive justice, as we have defined it in this chapter. In addition, though, survey findings point to popular views that efficiency is, to some extent, also viewed by people as fair (Konow, 2001).

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[1] It is also more general by allowing for aversion, not only to inequality, but also to fairness norms that call for unequal allocations.

Economists have different concepts of efficiency, but the primary version, and the one from which other definitions are mostly derived, is Pareto efficiency, which is related to the Pareto Principle (Pareto, 1906). The Pareto Principle endorses any changes that make at least one person better off without making anyone else worse off. For example, suppose that in an experiment two allocations are possible to two subjects: allocation A gives each subject $10, i.e., payoffs of (10, 10), whereas B gives the first $15 and the second $10, i.e., (15, 10). The Pareto Principle ranks B above A. Pareto efficiency is achieved when such opportunities have been exhausted: no one can be made better off without making someone else worse off. This strikes many economists as an innocuous goal, and some studies reveal popular support for efficiency changes that are equally shared, although this preference appears to be somewhat fragile.

Among economics experiments, Oxoby (2013), for example, examines subject preferences for the Pareto Principle using linear public good games. In his variation on the standard design, subjects may contribute any amount of their $10 endowment to a "public good," whereby each dollar contributed increases the earnings of everyone in the group of three by 40 cents. Thus, each dollar contributed reduces a subject's earnings by 60 cents (40 cents gained minus 1 dollar lost). If all contribute $1, however, gross earnings of each rise by $1.20 (40 cents for each of the three subjects). Thus, it is individually payoff maximizing to contribute nothing, but aggregate payoffs are maximized, if all subjects contribute their entire $10. In the standard version, Oxoby's subjects contribute, on average, $3.47. But, in another treatment, subjects can, similar to dictators, constrain the contributions of their two counterparts and do so at an average level of $9.25. Perhaps surprisingly, though, in this treatment, such "dictators" voluntarily increase their own contributions to $7.94, although it is payoff maximizing for them to contribute nothing. This is consistent with a preference for efficiency that is conditioned on the contributions of others. Beckman, Formby, Smith, and Zheng (2002) have groups of five subjects vote on one of two

unequal distributions of payoffs that differ with respect to their inequality and efficiency. When subjects do not know their payoff, only 10 % oppose Pareto-efficient allocations. When they do know their relative position in the unequal distribution, however, up to 60 % oppose the Pareto Principle.

Survey evidence shows that support for efficiency falls significantly, when it involves diminished fairness of other types (see Konow, 2001, 2003). Moreover, the Pareto Principle is very restrictive in several senses. On the one hand, it is a very conservative criterion. Suppose agents are initially endowed with allocation A, which equals (10, 2). Suppose further these could be changed to either B (11, 2) or C (9, 9). Only the move to B satisfies the Pareto Principle, since moving to C causes the first agent to lose $1. Thus, the Pareto concept potentially conserves initial allocations that might be considered very unjust on other grounds while endorsing changes that exacerbate the injustice. In addition, the practical relevance of the Pareto criterion is limited given rare opportunities to enact policies that produce no losers.

Given this final concern, economists, in practice, usually employ the Compensation Principle for policy analysis. This principle endorses any changes that satisfy the Pareto Principle, if transfers were allowed between agents such that winners could compensate losers. To take the example above, this criterion favors the move from A to C, because with C the second person could transfer some of her $9 to the first (e.g., $2) so that the first is no worse off with C (e.g., with $11 vs. $10), and the second could still be better off than with A (e.g., with $7 vs. $2). With a little reflection, it should be apparent that the Compensation Principle endorses any changes that increase total surplus, i.e., it is equivalent to maximizing the sum total—if the pie is enlarged, everyone can receive a larger slice. A critical point here is that the Compensation Principle does not require these transfers actually to take place; they only need to be hypothetically possible. This weakens the moral appeal of this criterion.

Most experimental tests of efficiency have focused on the possible existence of a preference

for surplus maximization, so we summarize results that bear on the Compensation Principle. Charness and Rabin (2002) and Engelmann and Strobel (2004) test preferences for efficiency and other motives using experiments in which subjects make multiple distribution decisions. Both studies find significant evidence of preferences for surplus maximization. For example, Englemann and Strobel employ three person dictator experiments and find that 60 % of dictators in their Treatment P, who here are paid a fixed fee, choose an allocation for the other two subjects that maximizes the sum total, even though this allocation creates greater inequality than two other less efficient allocations.

Although numerous studies have identified efficiency preferences, the evidence overall suggests that this preference is often weak or easily overturned by competing distributive concerns. Andreoni and Miller (2002), for example, find that subjects generally fall into different preference types and that only about 22 % prioritize efficiency over self-interest and equality. Moreover, the subjects in the Engelmann and Strobel experiment were economics students, who have sometimes behaved differently from non-economics students in other experiments. Fehr, Naef, and Schmidt (2006) use samples of students from other fields of study and nonacademic employees, and Pelligra and Stanca (2013) use a representative pool of subjects. Both studies reveal a stronger concern for inequality aversion and weaker efficiency preferences with subject pools that are not restricted to economics students. Moreover, fairness attitudes elicited in surveys indicate that preferences for surplus maximization are easily weakened by conflicts with other types of fairness, similar to the previously mentioned result with the Pareto Principle (Konow, 2001). In the survey study of Ahlert, Funke, and Schwettmann (2013), surplus maximization and self-interest (i.e., own payoffs) coincided with one another and conflicted with equality, and yet many respondents departed from solutions that maximized own and aggregated payoffs in order to equalize. All of this suggests that efficiency as a justice criterion is

fine as far as it goes, but it does not go far enough: one needs additional criteria.

5.2.3 Combining Equality and Efficiency

We have seen that equality and efficiency alone seem insufficient to account for distributive preferences. A natural next step, therefore, is to explore multi-criterion approaches that combine concepts of both equality and efficiency. Now we describe theoretical formulations that merge efficiency and equality and have been proposed in prescriptive and descriptive economics, and we examine evidence from empirical studies that shed light on such theories as representations of moral intuitions about distributive justice.

In positive economics, descriptive models have been formulated mostly in the effort to reconcile theories with findings from economics experiments. Charness and Rabin (2002), for example, first collected experimental data and then sought to fit a stylized model to their experimental results. The experiments comprise a series of games with either two or three players in which either one or two of the players make choices involving two possible allocations. Some decisions are dictator games, although the total payoffs can vary across the two allocations, which introduces a role for efficiency. These decisions are intended to shed light on distributive preferences. Other so-called "response" games involve sequential decisions and additionally target possible reciprocal motives. We focus here on distributive preferences, which Charness and Rabin model as a function of self-interest (i.e., the agent's own payoff) and two "disinterested" criteria. Regarding the latter, they conclude, first, that subjects care about maximizing the payoff of the worst-off person. This is the "maximin rule" or what Rawls (1971) called the "difference principle." Maximin preferences are generally equivalent to inequality aversion, except that the former allow departures from equality, if such deviations are to the benefit of the worst-off person. Second, Charness and

Rabin conclude that subjects also exhibit a desire to maximize the total surplus, that is, that agents value efficiency in the sense of the compensation principle. Indeed, their overall conclusion is that the importance of inequality aversion in previous studies has been exaggerated and that subjects have strong efficiency concerns. In general, they find that individuals trade off self-interest, the maximin rule, and surplus maximization.

The study of Andreoni and Miller (2002) shares similarities with that of Charness and Rabin. The former authors conduct an experiment and present a theoretical model fitted to their results that is based on preferences for self-interest, inequality aversion, and surplus maximization. Nevertheless, there are critical differences in design, theory, and results between the two studies. Whereas Charness and Rabin did not conduct within-subject analysis, Andreoni and Miller collected extensive within-subject data. Specifically, subjects make multiple dictator decisions in which the "price of giving" money to recipients differs, i.e., in addition to the standard 1:1 ratio of dollar given to dollar received; in other decisions a dollar given resulted in recipients receiving anywhere from 25 cents to four dollars. The authors then estimated individual preferences, testing three nonlinear functional forms to identify the best fit, as opposed to the single linear form of Charness and Rabin. The within-subject results permit consideration of possible preference heterogeneity across individuals, i.e., they allow for individual differences in the weights attached to each of their three motives. In fact, Andreoni and Miller find that subjects fit mostly into one of three types, whereby each type values only one of the three motives to the (near) exclusion of the others. About 47 % of their participants acted selfishly, taking all or almost all of the earnings, 30 % allocated so as to equalize payoffs, and 23 % allocated so as to maximize total earnings.

In prescriptive economics, the main effort to develop a theory of fairness is the "absence of envy" approach. As previously mentioned, the efficiency concepts have certain shortcomings as descriptive theories, but they also have various conceptual limitations as prescriptive theories, such as non-uniqueness (i.e., the inability to identify a single allocation that satisfies the criteria). Rather than abandoning efficiency, however, some economic theorists introduced an additional "fairness" criterion, partly to reduce the number of permissible allocations. In the prescriptive economics literature, fairness is usually equated with absence of envy (e.g., Foley, 1967), or with one of several variations on it (e.g., Pazner & Schmeidler, 1974). The basic version of this theoretical concept states that an allocation (for example, of goods among individuals) is fair, if it is envy-free, i.e., if no person prefers (or "envies") the allocation of another person. It proceeds from equal allocations, which are envy-free, and identifies additional unequal allocations that are also envy-free, e.g., different bundles of goods that people would not want to switch with one another. Finally, one looks for allocations that are both fair in this sense and efficient. There are various conceptual advantages and disadvantages of absence of envy, e.g., it reduces the number of permissible allocations, but sometimes there are no allocations that satisfy fairness and efficiency. Survey evidence also suggests that it does not capture what people usually mean by fairness (Konow, 2003). Other studies produce evidence consistent with absence of envy, but suggest it is, at best, a minor concern (Herreiner & Puppe, 2009, 2010). Beyond prescriptive economics, therefore, absence-of-envy concepts have not been very influential.

Although empirical support for absence of envy is weak, further experimental studies have been more supportive of fairness in the sense of simple inequality aversion and, specifically, of the value of merging this preference with efficiency concerns. Engelmann and Strobel (2004) employed three-person dictator experiments: one person chooses one of three allocations to him- or herself and two other subjects, whereby the total surplus could vary. Their experiments were designed to test the relative importance of efficiency concerns, maximin preferences, and inequality aversion, and the relative performance of the fairness theories of Bolton-Ockenfels and

Fehr-Schmidt. Engelmann and Strobel conclude that subject behavior is best explained by a combination of self-interest, maximin preferences, and efficiency concerns, that is, the Charness and Rabin model best reconciles their results. The fairness theories of Bolton-Ockenfels and Fehr-Schmidt, on the other hand, do not perform well; indeed, the occasional strength of the Fehr-Schmidt model can be attributed to the coincidence of inequality aversion and maximin preferences in certain decisions.

The Engelmann-Strobel experiments were conducted with business and economics students, and Fehr et al. (2006) argue that their results, therefore, overstate the importance of efficiency relative to equality. Fehr et al. replicated the Engelmann-Strobel study with business and economics students, on the one hand, and with various groups, on the other hand, including students with other majors and nonacademic employees. They found strong subject pool effects: whereas most business and economics students chose the most efficient and least equal allocation, most subjects in the other group chose the most equal and least efficient allocation. Fisman, Kariv, and Markovits (2007) extended the analysis of Andreoni and Miller and found mostly "well-behaved preferences," i.e., behavior was largely consistent with a choice theory that includes self-interest, maximin, and efficiency. Collecting individual data and using both two player and three player dictator games, they found considerable heterogeneity in preferences across subjects, but fairly consistent trade-offs between efficiency and equity within subjects. Nevertheless, they also found some behavior inconsistent with models based solely on self-interest/efficiency/maximin as with Andreoni-Miller and Charness-Rabin, which they attribute to competitive preferences and lexicographic preferences for self over other.[2]

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[2] Lexicographic preferences are when someone prefers more of one thing (say, good X) to any amount of another (say, good Y), but if two bundles contain the same amount of X, the bundle with more Y is preferred. In the current context, it means agents always prefer more for themselves, but for a given amount for themselves, they prefer more for others.

Overall, the evidence suggests that theories that incorporate both equality and efficiency concerns perform better than those based on inequality aversion or efficiency alone. Nevertheless, many findings are inconsistent with these hybrid models, suggesting that they neglect some relevant fairness preferences. In coming sections, we consider other approaches.

5.3   Equity and Desert

The theories presented in this section challenge the notion of treating equity as synonymous with equality. They propose, instead, that equity is based on conditions that usually imply inequality rather than equality.

5.3.1   Equity

In his Nicomachean ethics (fourth century BC, 1998), Aristotle declared that "equals should be treated equally, and unequals unequally, in proportion to relevant similarities and differences." Approximately twenty-three centuries later, sociologists (e.g., Homans, 1958), social psychologists (e.g., Adams, 1965), and later economists (e.g., Selten, 1978) picked up on this and proposed "equity theory," which defines equity in terms of proportionality rather than equality. That is, fair outcomes to people are in proportion to certain individual differences.

Evidence of preferences for proportionality can be found in studies of the "claims problem." This refers to situations in which individuals acquire claims on (i.e., historical entitlements to) some fraction of a resource, but the sum of these claims exceeds the available resource. This is not an infrequent circumstance in the real world, for example, when a firm goes bankrupt and its remaining assets must be distributed. This problem has received considerable attention in the social choice literature, e.g., Moulin (2002) and Thomson (2003). Various theoretical solutions have been proposed for adjudicating among the conflicting claims, and evidence has been collected on popular support for these solutions. In

the questionnaire study by Bosmans and Schokkaert (2009), participants faced problems of dividing reduced funds in two contexts: earnings to owners of a firm and payments to pensioners. The authors systematically varied the individual claims and amount to be distributed and checked for the perceived fairness of eight different rules. In both contexts and in two different countries (Belgium and Germany), the proportionality rule outperformed all other rules with preferred allocations being proportional to existing claims.

Two other studies of the claimsproblem compared prescriptive evaluations in surveys with the behavior of paid subjects in experiments. In the study by Gächter and Riedl (2006), one group of subjects bargained over real money in a claims problem based on their performance on a quiz, whereas a different group faced the same distribution problem but as respondents choosing the fairest allocation in a hypothetical scenario. The authors found that proportionality was the preferred rule in the survey, whereas allocations in the experiment shifted in the direction of equality. Similarly, Herrero, Moreno-Ternero, and Ponti (2010) found that the vast majority of survey respondents chose in accordance with proportionality, whereas subjects in paid experiments applied different rules depending on the experimental game and the monetary incentives. Thus, it appears that proportionality has normative appeal but that its effects are attenuated, when people have personal stakes in the outcomes.

5.3.2 Desert

Early equity theorists in sociology and social psychology left open the question of which variables fair outcomes are proportional to. Since any variable might be chosen, this version of equity theory predicts everything, which is to say, it predicts nothing. Thus, one must address, as Aristotle suggested, the question of which differences are "relevant." In justice research, theories of desert call for inequalities based on responsibility, although they do not necessarily incorporate the specific requirement that inequalities be proportional, as in equity theory. But the critical

distinction common to them is the so-called "responsibilitycut," i.e., the partitioning of attributes into those that justify inequality from those that have no such standing (e.g., see Schokkaert & Devooght, 2003). This is the critical question asked in the prescriptive literature on "responsibility-sensitive-->egalitarianism" (e.g., see Fleurbaey, 2008). A frequently advanced claim is that people are responsible for their effort but not for their luck, and that assertion finds support in both experiments and observational studies outside the laboratory.

Hoffman and Spitzer (1985) conducted a bargaining experiment with paired subjects in which the more powerful position of "controller" could be either assigned randomly based on a coin flip in one treatment or earned based on higher performance on a preliminary game between the two subjects in another treatment. The controller could allocate earnings unilaterally, although there was also a negotiation phase, in which the counterpart could enter into discussions with the controller and offer side payments. In the treatment with the coin flip almost all groups agreed on (almost) equal distributions, whereas in the game treatment controllers obtained, on average, a larger share of earnings. The authors attribute this to the role of luck in the first treatment and to the presence of effort in the second.

This conjecture also seems consistent with observational studies. For example, Fong (2001) used results of the 1998 Gallup Poll Social Audit Survey on attitudes of members of the labor force. She found strong correlations between support for redistribution to the poor and beliefs that the causes of poverty and wealth are due more to bad luck than to lack of effort. Interestingly, controlling for these beliefs, the effects of various proxies for self-interest, such as socio-economic status, were poor predictors of support for redistribution. Similarly, Alesina and Angeletos (2005) argue that differences in the perception of the roles of effort and luck in determining one's lot in life explain cross-country differences in support for taxationand redistribution. Indeed, in their theory, such attitudes can result in self-fulfilling prophecies, causing some societies to be more socially mobile than others.

5.3.3 Equity and Desert: The Accountability Principle

Although the evidence regarding the relationship of effort and luck to fairness seems strong, there are additional variables that strike many people as relevant, e.g., educational choices, investment decisions, or as irrelevant, e.g., genetic traits, inherited wealth. Konow (1996) proposed a general rule for the responsibility cut based on whether or not an agent can reasonably affect a factor. Those factors one can reasonably influence are "discretionary variables," which include effort and choices, and those that one cannot are called "exogenous variables," which include genetic traits and brute luck (i.e., luck that is not under one's control). The "accountability principle" merges this distinction with the proportionality of equity theory and claims that fair allocations vary in proportion to discretionary variables but disregard any effects of exogenous variables. Interestingly, the accountability principle emerged by induction through empirical research, but similar thinking, called *liberal egalitarianism*, was being proposed in a separate development in the prescriptive literature, e.g., Dworkin (1981), Arneson (1989), Roemer (1998), Bossert and Fleurbaey (1996), and Cappelen and Tungodden (2009). At any rate, Konow claims strong support for the accountability principle from his surveys (1996, 2001) and experiments (2000, 2009 with Siajo and Akai), which we now discuss.

The surveys involve hypothetical scenarios, which respondents judge as fair or unfair. Large majorities find it fair to allocate earnings in proportion to discretionary variables and to ignore exogenous variables across a variety of contexts including those relating to labor compensation, product pricing, the environment, resource allocation, and foreign aid. The experiments involve a *realefforttask*: subjects first prepare flyers for mailing, which is the basis for earnings.[3] Subjects are paired and their earnings pooled, then a randomly chosen dictator allocates the pooled earn-

ings between the two subjects in the second stage of the experiment. In "discretionary" treatments, individual productivity differs due to effort, whereas in the "exogenous" treatments (conducted only in the 2000 paper), productivity is equal, but individual contributions to earnings differ because of arbitrary differences in piecerates. This treatment variable is crossed with the choice of dictator for the second allocation phase: the dictator is a third party, or "spectator," who is paid a fixed fee to allocate the joint earnings of the pair, or the dictator is one of the subjects in the pair itself, i.e., a so-called "stakeholder." On average, spectators allocate proportionally in the discretionary treatments and equalize in the exogenous treatments, consistent with the accountability principle. Dictators who are stakeholders allocate similarly, except they take, on average, a larger than fair share, and the effect of the discretionary variable is weaker, whereby both findings are consistent with effects of self-interest.

The accountability principle seems useful for other purposes. On the one hand, it and related constructs can inspire more sophisticated empirical measurement based on prescriptive concepts of justice and injustice. For example, Almås, Cappelen, Lind, Sørensen, and Tungodden (2011) used the related principle of proportionality and responsibility proposed by Cappelen and Tungodden (2010) to conclude that the distribution of income in Norway had become less fair from 1986 to 2005. On the other hand, it can help explain findings of other experimental studies. For example, Cherry, Frykblom, and Shogren (2002) report very low transfers by dictators, who first had to perform a task for their earnings: depending on level of endowment and anonymity in the experimental condition, 70–97 % of dictators who performed the task gave nothing at all, compared with only 15–19 % in conditions where dictators performed no task and were simply endowed with their earnings. The authors conclude that "Strategic concerns—not fairness – appear to be the motivation for other-regarding behavior when people bargain over earned wealth" (p. 1221). But the recipients in the Cherry et al. study had no opportunity to participate in a

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[3]This task has also been employed in subsequent studies, e.g., Falk and Ichino (2006) and Carpenter et al. (2010).

task, so Mittone and Ploner (2008) replicated their experiment but allowed both dictators *and* recipients to perform the same task. Now, only 21–48 % of dictators transferred nothing to recipients. The patterns from both studies seem consistent with fairness in the sense of the accountability principle, moderated, of course, by the influence of self-interest on behavior and (sometimes self-serving) interpretations of fairness. Dictators and recipients are equally responsible for earnings when both perform the task and when neither performs the task, so the accountability principle calls for equal splits, and dictators are relatively generous. When only dictators exert the effort and generate the earnings, however, they consider only themselves responsible for earnings and feel justified in giving away little or nothing.

Evidence from other experiments suggests that the location of the responsibility cut might not be clearly agreed upon. In the experiment of Frohlich, Oppenheimer, and Kurki (2004), subjects first generate earnings by discovering spelling errors in a proofreading task. Then the subjects are paired, and one arbitrarily chosen member of each pair allocates the pooled earnings. The dictator allocations suggested heterogeneous agents: they exhibited varying degrees of self-interest, and, in terms of fairness, some leant toward equality and others toward equity (i.e., proportionality). Whereas the earnings in Konow (2000) were due solely to either discretionary or exogenous factors depending on the treatment, Cappelen, Hole, Sørensen, and Tungodden (2007) sought to combine these two into a single treatment: paired subjects could make different decisions and achieve different rates of returns on their decisions in the production phase. The production in their experiment involved a decision about how much of an endowment to invest, which could either be doubled (in the low return case) or quadrupled (in the high return case). In the distribution phase, subjects were paired with different counterparts having different investment decisions and either different or equal rates of return, and both subjects in each pair made allocation decisions. Actual payments were based on one randomly chosen matching and a randomly chosen dictator.

They find that subjects mostly fall into one of three categories with respect to their fairness preferences: 44 % are *egalitarians* and prefer equal total earnings, 18 % are *libertarians* and wish to leave earnings as they are regardless of the source of differences, and 38 % are *liberal egalitarians* who respect the effects of different investment decisions but ignore (i.e., equalize for) differences in rates of return. There is ambiguity about how to reconcile these results with responsibility concepts.

These last two studies, therefore, seem to provide, at best, qualified support for the accountability principle, which raises the question of possible sources of differences between them and Konow (2000). For example, in the Cappelen, et al. study, the investment decision seems discretionary and the rates of return exogenous, but fewer than one-half of the subjects exhibit the corresponding liberal egalitarian preferences. One possibility is that basing the responsibility cut on the discretionary vs. exogenous distinction is erroneous, or at least incompletely specified. Replication might shed light on the robustness of these results. Cappelen, Sørensen, and Tungodden (2010) added several wrinkles to their 2007 study: earnings reflected individual productivity at a typing task, subject choice to work either 10 or 30 min, and the exogenously given price per word correctly typed. Otherwise, the design is similar to their earlier study with multiple pairings, allocation decisions, and randomly chosen payments. As in their previous study, they find considerable differences in fairness types: 18 % are egalitarians, 30 % are libertarians, 5 % are choice egalitarians (only choice of work time matters), and 47 % are a new category they call meritocrats (work time and productivity count but price differences do not). Konow et al. (2009) utilize the discretionary stakeholder and spectator treatments of Konow (2000) with subjects in the U.S. and Japan and replicate the earlier pattern of proportionality among spectators and an attenuated effect with stakeholders in both subject pools. Thus, these replications seem successful but in replicating ostensibly contradictory results, and they do not, therefore, resolve the validity of the accountability principle.

Another possible explanation is based on differences in experimental design and in how subjects might interpret relevant differences. For one, the studies of Frohlich et al. and Cappelen et al. employed stakeholders, who make decisions affecting their own allocations, whereas the studies of Konow and Konow, Saijo, and Akai used both stakeholders and spectators. The strict proportionality in the latter is associated only with spectators, whereas this effect is weaker among stakeholders and in Konow, Saijo, and Akai is combined with equality preferences. This is consistent with the previously cited distinctions between spectators and stakeholders reported in Gächter and Riedl (2006) and Herrero et al. (2010). Thus, the findings of the Frohlich et al. and Cappelen et al. studies do not necessarily contradict the accountability principle, which is an impartial standard that can be more closely associated with spectators, and are also consistent with stakeholders who care about accountability, self-interest, and equality.

If the targeted fairness preferences are supposed to be impartial, there are challenges in using stakeholders because of the influence of self-interest. Cappelen et al. address this issue by adding assumptions about the structure of individual preferences (or *utility*, in economics terminology). Without imposing such assumptions, however, one can obtain empirical measures of the effects of self-interest. For example, Konow (2000) concluded that over 60 % of unfair behavior can be traced to self-deception, i.e., unfair people deceiving themselves into believing they are being fair. This conclusion is based on monetarily incentivized decisions about the allocation of rewards in roles of both stakeholder and spectator. Some evidence points to self-serving interpretation of competing distribution rules, which is sensitive to opportunities to distance oneself from one's choices (similar to the evidence cited in the previous section, e.g., Dana et al., 2007). For example, Becker (2013) conducted a dictator experiment with productionusing stakeholders. Allocations were driven mostly by performance in an effort task, but introducing different forms of luck altered behavior: being lucky by having a randomly higher wage results in taking more than

the fair share, being lucky by having a higher endowment causes low performers to take more, and making payments probabilistic by allocating lottery tickets instead of money causes all types to allocate more selfishly.[4]

Another design issue that surfaces in such experiments is the attribution of responsibility for differences in production. In Cappelen et al. (2007), differences arise from amounts invested, whereas the other studies cited utilized real effort tasks. In addition to proofreading, letter stuffing, and typing, such tasks have included entering bibliographical records (e.g., Tonin & Vlassopoulos, 2012), counting letters in paragraphs (e.g., Rosaz & Villeval, 2012), answering general knowledge questions (e.g., Gächter & Riedl, 2005), playing a game (e.g., Hoffman & Spitzer, 1985), and moving objects on a computer screen (e.g., Gill & Prowse, 2012). At least two questions arise about relating performance in these activities to justice preferences. First, to what extent are subjects responsible for any differences? The accountability principle ignores repercussions of innate differences, but does one's score on a general knowledge quiz or skill in a game reflect choices, innate skills, or some combination of the two?

Second, the accountability principle refers to activities that generate something of value. Although the tasks in these laboratory experiments generate subject earnings, it is unclear to what extent subjects view their production as being of true economic value as opposed to an artificial exercise in which the experimenter transfers money to subjects for a meaningless activity. Perhaps the strong proportionality results in the studies of Konow and collaborators reflect favorable answers to both of these two questions: 80 % of participants in Konow, Saijo, and Akai believe that performance in the letter stuffing task was under the control of subjects, and the task seemed to be widely accepted by subjects as gen-

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[4]There is now a very substantial literature on self-serving fairness biases. A few such studies include Babcock, Loewenstein, Issacharoff, and Camerer (1995), Piovesan and Wengström (2009), Rodriguez-Lara and Moreno-Garrido (2012), and Ubeda (2014).

erating useful output (although no deception was employed), consistent with the claim by Carpenter, Matthews, and Schirm (2010) of its high external validity.

In this section, we have reviewed evidence that strongly supports the relevance of equity (or proportionality) and desert (or responsibility) for fairness. Nevertheless, there is still debate about the exact location of the responsibility cut. Moreover, findings reviewed in the prior section and in the following section suggest that one must include additional concepts in order to account for fairness views.

5.4 Pluralism and Context

We have seen that different evidence supports different theories of justice. One explanation for this fact is based on the following two claims: first, justice is pluralistic, consisting of multiple principles, and, second, the relevance of a principle, or combination of principles, relates to the context. This section considers approaches to economic justice that are founded on these dual concepts of pluralism and context.

5.4.1 Context

Broadly speaking, we can distinguish two research programs that relate context to pluralistic justice. *Context-specific* approaches to justice claim that different fairness principles apply in different contexts. In philosophy and prescriptive economics, Elster (1992), Walzer (1983), and Young (1994), among others, have made influential contributions to context-specific justice, arguing for fairness rules that vary with institutions, nationality, the good being distributed, and culture. The best known version of context-specific--> justice, or rather context-specific ethics in general, is *moral relativism*, which claims that morality is culture-specific, i.e., people follow different moral norms, including fairness rules, in different cultures. Empirical evidence on cultural specificity related to justice can be found in the seminal studies of Henrich and his collabo-

rators (Henrich, 2000; Henrich et al., 2001). They conducted versions of the ultimatum game with people in small scale societies across the world and found large differences in behavior ranging from very meager proposer offers that were rarely rejected to "hyper-fair" proposals (i.e., more than one-half of stakes) that were also frequently rejected!

Another research program claims that justice is not context-specific but rather *context-dependent-->*. That is, it asserts that there are multiple principles of justice, which are shared across different contexts, but the interpretation of and weight assigned to the various principles depends on the context. For example, in the context-dependent--> version of justice in Konow (2001, 2003), all people in all places are seen to care about accountability, efficiency, and basic needs, but their interpretation of how to apply each principle and how to weight each principle depends on the context. Here one can think of context as the set of people and variables in a situation being evaluated, and one can distinguish two types of context. First, there are the impersonal fundamentals of the people and variables being judged in fairness terms, and, second, we have the personal context of those who are judging, that is, the evaluators' own histories, characteristics, and any traits that might impact their fairness views.

Taking an application of this second type of context first, a context-dependent approach would see the Henrich et al. results, in particular, those that are aberrant compared to the vast majority of findings, as reflecting differences in weights attached to different motives, which are consistent with differences in the cultural conditioning of the participants. For example, the meager offers and infrequent rejections are consistent with societies in which self-interest often dominates fairness concerns; indeed, this behavior approximates the predictions of the standard model that is based on rational self-interest. The hyper-fair offers and rejections of such offers, on the other hand, are consistent with societies based mostly on gift-givingand reciprocity in which generous offers produce greater obligations on the recipients, hence the frequent rejection of

such offers. This is to say that self-interest, fairness, or reciprocity are valued in all of these societies, but the cultural experiences of the subjects lead them to interpret the experiment differently and to weight the principles differently.

Let us clarify the distinction between these two views of context with an example. Context specificity might claim that people in a poor society care only about basic needs, whereas those in an economically developed country value desert and efficiency. Context dependence, on the other hand, asserts that all people care about a common set of principles, but the salience of each principle varies across societies. For people in a poor country, basic needs are often most salient, but they also express preferences for desert and efficiency, e.g., they make more efficient choices, when the sacrifice in terms of need satisfaction is small enough. Similarly, need is less salient to those in developed countries, but, nevertheless, people there do transfer substantial amounts of resources to satisfy basic needs.

Economists have examined the relationships between fairness preferences and many demographic variables, including gender, academic major, age, race, and even beauty (for example, see Camerer, 2003). Croson and Gneezy (2009) review numerous studies for gender effects and conclude that men, relative to women, are more concerned with efficiency and less with inequality. In particular, the evidence suggests that women's choices are more context-dependent than men's (see also Schwettmann, 2009, for an overview). Overall, though, demographic variables seem to have rather small effects on behavior in economics experiments, although differences between groups are sometimes statistically significant. Many other factors of the context have been studied in experiments, including the number of repetitions of experiments, the size of stakes, or the degree of anonymity of players. In his review, Camerer (2003) concluded that, in ultimatum games, repetition makes little difference and the only effect of stakes is that larger stakes cause given offers to be rejected more frequently, whereas, in dictator games, greater anonymity lowers dictator gifts.

Although most studies show little effect of the size of stakes, there is evidence that hypothetical (i.e., zero) stakes do make a difference in dictator and ultimatum games: subjects make fairer choices relative to games with real, positive stakes (e.g., Forsythe et al., 1994). Another important aspect of stakes is whether they are *personal*: in experiments with stakeholders and spectators, both have positive stakes, but only the stakeholder stakes are personal. Stakeholders make decisions affecting their own, personal payoffs, whereas spectators are paid a fixed amount to decide the payoffs of others. In the previous section, we discussed evidence showing that spectators allocate earnings proportionally, whereas stakeholders shift toward a mixture of proportionality and equality. Konow et al. (2009) vary how personal relationships are across treatments and find proportional allocations when stakes are not personal but an increasing movement toward equality, as they become more personal across treatments. In addition, spectator decisions reflect a significantly higher level of agreement than stakeholder decisions, according to the results of various studies (e.g., Cappelen, Nielsen et al., 2013; Croson & Konow, 2009; Konow, 2000), reflecting, in part, variation across stakeholders in the weight they attach to fairness relative to their material interests. If one wishes to obtain clearer signals of impartial judgments about justice in experiments and surveys, therefore, Konow (2009) underscores the value of seeking to reduce the salience of personal context, which might introduce bias, while at the same time including relevant impersonal fundamentals of the people and variables being evaluated by subjects or respondents.

Nevertheless, evidence of *framingeffects* suggests that fairness judgments are not always stable, even under conditions in which the evaluators have no material stakes and the context is presented impersonally. Framing effects are differences in judgments due to seemingly inconsequential changes in the presentation of the same fundamentals. The seminal study of Kahneman et al. (1986) examined economic justice views with respect to various vignettes involving changes in prices or wages and identi-

fied framing effects. For example, in their Question 4, a company cuts real (i.e., price-adjusted) wages by 7 % in light of a local recession, which a majority of respondents judged as unfair when due to a cut in nominal (stated) wages, but as fair, if accomplished by the company's failure to increase nominal wages with inflation. This seemingly contradicts any previously discussed fairness rules, whether equality, efficiency, desert, or proportionality, which are usually applied to real outcomes. Real payoffs are equivalent across the two versions of this scenario. Konow (2003), however, argues that such framing effects are consistent with general justice principles, if respondents are applying principles to the subjective values of those being evaluated rather than to the objective, economic variables. In the aforementioned example, suppose respondents care about the subjective satisfaction of those being evaluated and believe, in contexts involving changes rather than levels of variables, that it is tied to changes in nominal, rather than real, wages and prices (called *money illusion* in economics). Then a cut in nominal wages imposes an unfair cost on employees without any countervailing cost being borne by employers, whereas failure to adjust the nominal wage imposes no such subjective cost.

5.4.2 Pluralism

We now turn our focus from context to pluralistic justice. Both topics are interconnected, but the previous subsection stressed the role of context, whereas this subsection focuses on the principles. Various theories and empirical findings of multicriterion justice were discussed in the previous sections on equality and efficiency and on equity and desert. So, here we address additional fairness concepts and empirical evidence on their comparative importance. In addition, previous discussions have focused mostly on the behavioral economics literature, whereas here increased attention will be paid to results from empirical social choice where one often finds simultaneous empirical analysis of multiple prescriptive theories of justice. Nevertheless, we should also note

the overlap of pluralistic justice in economics with work in social psychology: Deutsch (1985), Lerner (1975), and Leventhal (1976), among others, have also proposed multiprinciple approaches to justice that rest on some of the same principles discussed here, including need and equality.

Empirical social choice begins with a paper by Yaari and Bar-Hillel (1984), who presented Israeli college students with questions based on a hypothetical scenario involving the division of two fruits between two agents. Respondents were asked to choose the just division from among a set of allocations that coincided with different distribution rules, including equality, utilitarianism, maximin, and various game theoretic bargaining solutions. Interest in the maximin rule arises from Rawls (1971, 1974) difference principle, which calls for allocating social and economic goods so as to maximize the benefits of the worst-off individual. It usually conflicts with utilitarianism (e.g., Harsanyi, 1975), which maximizes the sum total of benefits, and sometimes also with inequality aversion. Across questions, there was variation in information relevant to needs, tastes, and beliefs of the two agents in the scenario, and the authors found significant differences in responses depending on this information.

When presented as a matter of needs, specifically in terms of the nutritional value of the fruits (which differ to the agents), 82 % of respondents chose the maximin allocation, which distributed the fruits unequally in order to equalize the health value across agents. Other information conditions, however, yielded a more disperse distribution of views. Information about the differing tastes (or utility) of the agents resulted in 35 % choosing the utilitarian allocation, which maximizes total utility, 28 % equalizing utility across agents, and the remaining respondents choosing one of three other distributions. When presented as agents' beliefs about the nutritional value of the fruits, 51 % chose equal perceived benefits across agents, 34 % ignored beliefs and equalized the two fruits to the agents, and 15 % the other three choices. Moreover, when the nutritional or taste values of the fruits are varied in the various information conditions, subject

responses often change. This leads to the first main conclusion from the findings of this study, namely, that people trade off various goals such as equalizing or maximizing values. The second important result of this study is that the only distributive rule, which emerges clearly, is the maximin rule: only it garners a relatively robust majority of votes and only when needs are salient. Needs have, until fairly recently, been mostly neglected in behavioral economics, whereas they have been more extensively investigated in empirical social choice.

In order to investigate the empirical acceptance of the maximin principle more thoroughly, Gaertner and his co-authors conducted numerous survey studies in different countries (see Gaertner, 1994; Gaertner, Jungeilges, & Neck, 2001; Gaertner & Schwettmann, 2007). One scenario involves the allocation of a fixed sum of money between a disabled person, who could then learn some very basic things, and an intelligent child, who could achieve greater educational advances. This results in a conflict between the needs of the handicapped person and efficiency issues with the intelligent child. Different versions of the scenario vary the number of intelligent children, who can be helped with the money. The results show that most respondents initially help the handicapped person, but they increasingly switch over to helping the children, as their numbers rise. Hence, participants seem to trade off concerns for needs and efficiency. Furthermore, the results were varied somewhat with contextual elements of the respondents, including their cultural background and some socio-demographic characteristics like gender. As reviewed in Schwettmann (2009), such differences have surfaced rather often in empirical social choice studies.

As previously discussed, behavioral economists have studied questions of responsibility, and this topic has also been examined in empirical social choice. Indeed, Fleurbaey and Maniquet (2010) have argued that such concerns might have been implicated in the Yaari and Bar-Hillel study, depending on whether agents are held responsible for their tastes. Schokkaert and Devooght (2003) addressed responsibility head on in questionnaire studies conducted in Belgium, Burkina Faso, and Indonesia. Although no unambiguous consensus among respondents emerges, the authors find limited support that agents are held responsible for preferences with which they identify. They find stronger support that the responsibility cut is drawn based on the variables agents control, consistent with the accountability principle. There is also agreement across the three samples on the location of the responsibility cut, although there are some differences in the weight attached to efficiency.

Other studies have focused more closely on conflicts between responsibility and other goals. In the questionnaire study of Schwettmann (2009, 2012), respondents exhibited disperse preferences for maximin, basic needs, and utilitarianism with a floor, i.e., maximizing the average subject to a minimum income. In versions of the questionnaire, the worst-off agent was responsible for his plight, and the size of the better-off group was varied in a within-subject design. A moderate trade-off between efficiency and needs was found, but, in this scenario, most respondents allocated consistently to the worst-off agent. Faravelli (2007), on the other hand, found support for rewarding higher productivity when it was due to different effort levels, but maximin gained most support in the case where low productivity was due to a handicap. Gaertner and Schwettmann (2007) also combined aspects of responsibility and basic needs: in one version a disabled person was handicapped from birth, whereas in another version, the handicap was due to participation in a dangerous sport. Support for the needy person was lower, when the agent was responsible for the handicap.

There is also evidence consistent with a concern for basic needs from incentivized economics experiments. In the Eckel and Grossman (1996) dictator experiment, subjects allocated a fixed sum between themselves and an anonymous student recipient in one treatment, or between themselves and the American Red Cross in another. Average transfers in the latter treatment were three times those in the former. To address questions of responsibility and need, Cappelen,

Moene, Sørensen, and Tungodden (2008) conducted a dictator game with production with subjects in two rich countries (viz., Norway and Germany) and subjects in two poor countries (Uganda and Tanzania). When incorporating the needs motive in a statistically estimated choice model, the authors found that the predicted amount transferred from rich dictators to poor recipients increased dramatically. They found most subjects exhibited a concern for productivity differences and some for basic needs. In contrast to previous experiments that consciously avoided moral context, Aguiar, Brañas-Garza, and Miller (2008) accentuated it by explicitly stating the benefits to the poor recipients and found that a large majority of dictators donated their entire €15, often citing a concern for the basic needs of the recipients.

Konow (2010) presented alternative theories of motivations for giving parallel to dictator experiments designed to test them. The design included variations on recipients (fellow students or charities), the endowment of recipients, the presence of matching grants, and the measurement of dictator feelings. Average giving to charities was significantly greater than that to student counterparts, although matching grants reduced somewhat this difference. Moreover, generosity created good feelings when recipients were charities and bad feelings when they were fellow students, although the best feelings were those of dictators, who were denied the opportunity to share and got to keep the entire endowment. Overall, these results are inconsistent with standard models of altruism and with social preference models that are based on single norms. Instead, the conclusions were interpreted as fitting best a model that incorporates context-dependent-->fairness norms, consistent with the framework of Konow (2001, 2003), in which justice is based on the three principles of accountability, efficiency, and basic needs.

This section has reviewed results in the economics literature on the effects of context and on the relevance of multiple fairness principles. Empirical evidence indicates that context matters for fairness judgments, both in the sense of the context of the evaluators and the context of the

persons and variables being evaluated. Taken as a whole, we conclude that justice is context-dependent-->, i.e., based on shared principles that are sensitive to the context, rather than context-specific-->, i.e., heterogeneous across different contexts. That is, there is individual and even cultural variation in the interpretation of or weight placed on different fairness concepts and these respond to the context of the evaluator and the evaluated, but fairness values are shared in common. In addition, the results of surveys and economics experiments strongly support the claim that people value multiple principles, with robust evidence of responsibility, proportionality, efficiency, basic needs, and equality.

5.5   Risk

Risk is involved in virtually all situations in which justice is implicated, including in many of the most important contemporary issues of justice. By definition, risk involves the possibility of either gain or loss, but its positive and negative features go beyond this simple observation. Reckless risk-taking is behind important deleterious events such as the recent financial crisis, but risk-taking by entrepreneurs, workers, and even public officials is also an indispensable (and unavoidable) ingredient in many productive economic and social activities, including those involving innovation, education, and investment. Despite the importance of questions of risk, the vast majority of empirical justice research in economics and other disciplines has been developed in deterministic contexts. There have been several recent advances on these questions, which we review briefly in this section. One strain of the literature has explored whether certain behaviors should be attributed to fairness OR risk, i.e., to what extent risk preferences might be driving apparent fair conduct. Another very recent development focuses on fairness AND risk, i.e., this research asks what the fair allocations of rewards are to agents who have chosen to take risks or to avoid them. This topic, therefore, relates to questions of justice and responsibility.

5.5.1 Fairness *or* Risk

Most previous experimental studies of fairness in the context of risk fall into the first category above: they have examined the role preferences for fair distributions versus the desire to avoid risk. As already reviewed here, many proposers choose seemingly generous offers in the ultimatum game. It is unclear, however, that this is motivated by fairness or any other moral concern: even an entirely self-interested proposer might offer a generous fraction of the pie (i.e., fixed stakes), if there is the fear that the responder will, for whatever reason, reject a meager offer. In fact, the aforementioned comparisons of ultimatum proposals and the typically smaller dictator gifts suggest that an important fraction of ultimatum offers are motivated by self-interest. There is an additional role, though, for risk preferences: making a less than fair offer (one-half in the standard ultimatum game) increases the risk of rejection, but, in most cases, the expected value is maximized at less than one-half. Thus, a self-interested and risk neutral proposer will typically offer less than the fair amount, but a risk averse proposer weights losses more heavily than gains and will offer more than the risk neutral proposer. In fact, the ultimatum study of Oechssler, Roider, and Schmitz (2006) finds that a measure of risk aversion is correlated in this manner with proposer offers.

More generally, the relationship between fairness and risk preferences depends on a rather complex set of considerations captured in competing theoretical models. Babicky (2003) used dictator games where the pie size was a random variable and found dictator giving was related to both fairness and risk preferences, suggesting that people prefer to share risk, although the exact relationship between risk and fairness depends on the individual degree of risk aversion. Babicky, Ortmann, and Van Koten (2013) extended this study to include ultimatum and other games and found that those who are more risk averse are also more inequality averse, but the within-subject design also revealed considerable inconsistency in decisions at the individual level. Krawczyk and Le Lec (2010) had dictators allocate tokens to a lottery and compared this to shares allocated in a standard deterministic dictator game. Their subjects allocated very selfishly, on average, but they were somewhat more generous in the standard dictator game. To the extent some dictators deviated from self-interest; it was more for the sake of efficiency (or surplus maximizing) than equality. Measured risk preferences were not significantly related to dictator decisions.

In the experiment of Bradler (2009), subjects made a series of choices between lotteries and certain payoffs. She concluded that people were willing to deviate significantly from their individual risk preferences in order to increase the other's payoff. This and other studies shed light on risk preferences, fairness preferences, and their interaction and are relevant, therefore, to discussions of procedural justice. Indeed, the seminal experimental study on this topic by Bolton, Brandts, and Ockenfels (2005) suggests that preferences for fair opportunities are distinct from those for fair outcomes, although the two are still related. Specifically, rejection rates for given offers in ultimatum-like games depend on the available procedures: rejection is higher, if the proposer could have, but did not, choose a fair procedure. Wu and Roe (2006) similarly found a preference for fixed contracts over tournaments (i.e., where only one party acquires a prize) based not on risk aversion, but on fairness concerns.

5.5.2 Fairness *and* Risk

Most of the literature on fairness *or* risk involves *ex ante* justice, i.e., the possible role of fairness preferences preceding decisions involving risk. The literature on fairness *and* risk, on the other hand, includes consideration of *ex post* justice, i.e., the fairness of allocations after parties have made their choices about risk taking. That is, what is the fair allocation to a party that has made, or avoided, a risky choice that has resulted in some payoffs? There is a related, and extensive, theoretical literature on the prescriptive question of how one should evaluate risky situations, e.g., Harsanyi (1955), Diamond (1967),

Hammond (1981), and Fleurbaey (2010). Our focus here, though, is on the empirical literature, which is emergent. Brock, Lange, and Ozbay (2013) set out to examine whether fairness preferences are based on ex post payoffs or ex ante chances. Ex post fairness would ignore chances and focus only on payoffs, whereas ex ante fairness considers only chances and not payoffs. The authors employed a dictator experiment in which dictators allocated tokens to themselves and recipients with variation across treatments in whether each token produced money with certainty or a lottery ticket and in whether the lottery ticket option applied only to the recipient, to neither dictator nor recipient, or to both. They conclude that the results are best reconciled with a model in which agents value both ex ante fairness and ex post fairness.

Cappelen, Konow, Sørensen, and Tungodden (2013) also consider ex ante and ex post justice, but they focus on the fair distribution of gains and losses when agents choose whether or not to take risks. Subjects first faced a sequence of choices between risky alternatives and a safe alternative, whereby the value of the safe alternative varied across versions. Each subject was then repeatedly paired anonymously with another who had faced the same choices, and their earnings were pooled. For every pairing, each subject made a decision as dictator about the division of earnings, and decision of one subject in one pairing was randomly chosen for payment. The study included stakeholders, who participated in the risk phase, and spectators, who did not but made decisions about the allocation of earnings for paired subjects who had participated in risk-taking. This experiment was designed to distinguish important views of fairness and risk-taking. The ex ante view advocates no redistribution when, as in this experiment, agents have equal opportunities. The ex post view focuses on outcomes and eliminates all inequalities resulting from risk-taking. A third position, the choice egalitarian view, holds people responsible for their choices but not for their luck, and therefore, eliminates inequalities between lucky and unlucky risk-takers but not between risk-takers and those who chose the safe alternative. The results indicated a dispersion of

these three types, and the frequency of each type was approximately the same for stakeholders and spectators. An overlapping majority of subjects, however, made choices consistent with the choice egalitarian view on the two main questions: lucky risk-takers should compensate unlucky risk-takers, but no redistribution is called for between risk-takers and risk-avoiders.

We have reviewed the literature on fairness when risk is potentially implicated. One can distinguish at least two questions on this topic: first, what are the separate roles of fairness and risk preferences, and, second, what does fairness dictate about the rewarding of risk-taking behavior? Despite its great importance for many economic and social debates and policies, relatively little empirical analysis has been conducted to date.

5.6   Conclusions

This chapter has reviewed many of the most important contributions to distributive justice in the economics literature. One finds there a considerable volume of rigorous theoretical and empirical analysis that both builds on economic methods and draws on many insights from other disciplines, including psychology, philosophy, sociology, and political science. Economic research on justice in recent decades has not only firmly established this as a serious topic of analysis, but has also significantly advanced our understanding of justice. Much of this progress is surely due to the increasingly interdisciplinary character of economics, whereby economists learn from other disciplines, economic discoveries feed into other fields, and economists and non-economists now often collaborate. Given the subject matter of the chapter, we have focused here mostly on investigations that have their source in economics. We conclude that this research demonstrates robust support for multiple principles of justice, including equality, efficiency, equity, desert, and basic needs, and for the dependence of fairness views on context.

Much work remains, however, for the study of justice in economics. Although we view the evidence in favor of context-dependent justice as

strong, there is much ground to cover to understand how, exactly, justice views depend on the set of variables and persons encountered in different contexts. For example, how do we reconcile the conflicting justice claims of different generations, which are so important to questions like public debt and climate change? If, in fact, the justice preferences of people can be traced to a common set of principles, and differences in claimsabout fairness are based solely on context, is it possible for different people and groups to agree on how to make such comparisons, e.g., for addressing inequities between rich and poor? In addition, research on the relationship of fairness preferences to risk is in its incipient phase, and there remains much to learn about this economically and socially important phenomenon. We considered fair rewards under simple conditions with equal opportunities, but what is the fair distribution when initial opportunities are unequal, and what are the effects of context on fairness judgments when risk is involved?

Finally, we have treated the topic of this chapter as distributive justice, which is a very broad and important topic with wide-ranging economic and social ramifications. But, of course, justice in this sense is not the only motive people value or the only one on which they act. Beliefs and actions are also affected by self-interest, cognitive factors, experiences, and other personal considerations. But setting these aside, there are other types of moral motivation that can interact with justice motives in some manner, whether complementing or competing with them. These include preferences for honesty, rights, cooperation, and reciprocity.

Among moral motives, reciprocity is the one that, along with justice, has been the object of the largest volume of research in economics. Given the size of this literature and in the interests of conciseness, we have focused here on justice, but justice and reciprocity are clearly interdependent. At a minimum, reciprocity concerns rewarding fair and punishing unfair behavior or intentions, but that requires a concept of fairness. Some authors have also argued for the opposite type of dependence: reciprocal motives might influence standards of fairness. Gintis, Bowles, Boyd, and Fehr (2005), for example, contend that the coop-

eration necessary to human flourishing can be attained by sufficient numbers of so-called "strong reciprocators," i.e., those who are conditional cooperators and altruistic punishers. While the tendency toward strong reciprocity is universally shared, according to them, it can lead to different fairness norms specific to socio-cultural conditions (Henrich et al., 2004).

Future research might explore whether the one influences the other, and, if so, how. The foregoing context-specific thesis of Gintis et al. stands in apparent opposition to the context-dependent justice for which we have advocated thus far. It is possible, however, that these two views might be reconciled. For instance, according to the context dependence view, moral principles stretch across cultures, but it does not claim the principles will be equally weighted in every context or culture. In particular, context dependence addresses a higher level of abstraction associated with impartial moral judgments, but it does not rule out specific norms developing in response to local context. Thus, it asserts that all people value fairness and all people value reciprocity, but appeals to morality will vary due to a wide set of considerations, including the relative weights on self-interest, fairness, and reciprocity, as well as the choice of persons and variables employed for comparisons. We might think, therefore, of justice *principles*, which are general and stable, as well as fairness *norms*, which are specific and might evolve. This suggests some tests for future research. For example, suppose a society becomes more dependent on individual effort and less on cooperation: do norms increasingly stress fairness and decreasingly reciprocity? If, by contrast, individual effort becomes less important and cooperation more, do norms shift from fairness to reciprocity? These and other questions remain for future work.

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Part II

The Justice Motive

Justice and Self-Interest

6

Leo Montada and Jürgen Maes

It is part of human nature to build theories and views about ourselves, other people, and the social world we live in. These theories or assumptions may be right or wrong, but either way, they have a profound influence on our experiences, appraisals, and behavior. Justice and self-interest are components of these views and have a large impact on our lives.

In social life, both concepts—justice and self-interest—are often used with an ideological attitude. This is the case when self-interest is contended to be the cardinal motive of humans, and doubt is cast upon the existence of prosocial and justice motives when self-interest is purported to lay behind such motives. Also, the widespread rational-choice model, which explains the process by which prudent decisions are made, has an ideological character insofar as only actions driven by self-interest are considered to be rational ones.

Justice is often postulated as a corrective for self-interest. However, justice too is often claimed in an ideological manner in the political

arena and in all private and professional contexts, particularly in conflicts in which actors argue for their own convictions of what is just or unjust and are not willing to consider the positions of others. The editors' invitation was a welcome opportunity to highlight the relevance of justice research in contesting the ideological use of both concepts.

In the first part, we question the still widespread conviction that self-interest is the dominant human motive by referring to manifold lines of research that evidence the power and impact of justice motives. In the second part, we outline the large divergence in convictions about justice and the conflicts resulting from this fact. The chapter ends with a discussion of justice with two options for settling conflicts: decisions made by authorities and conflict mediation.

6.1 Is Self-Interest the Cardinal Human Motive? Doubts Are Relayed and Supported with Empirical Evidence for the Justice Motive as a Primordial Motive

The hypothesis that self-interest is the cardinal motive of *homo sapiens* has been and is still propagated by several academic disciplines. Academic theories and models have a self-affirming effect

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when assumptions about the nature of man are broadly believed in the population. Thus, when the contention that self-interest is the fundamental human motive (as known from the economic theory of behavior) is widely believed, this prevalence contributes to the affirmation of this theory:

The theory gains influence on the thoughts and actions of people in everyday life, on their explanations of other people's behavior, on political rhetoric, and on programs.

It is widely considered normal and right that people pursue their self-interest (Miller & Ratner, 1996; Miller, 1999; Ratner & Miller, 2001): Social commitments without self-interest are often viewed as strange or even as deviant (e.g., the commitment of heterosexuals to protect the rights of homosexuals). Wuthnow (1991) provided many examples of people who tend to justify their prosocial actions with some kind of self-interest: "At least I come in contact with people this way." They regard such explanations as socially more acceptable than altruism. The study by Holmes, Miller and Lerner (2002) on exchange fiction is a nice piece of evidence for this hypothesis.

6.1.1 How Is the Myth of Self-Interest as the Cardinal Human Motive Disseminated?

Several studies have provided evidence that attending a course on microeconomics, wherein self-interest plays a major role in model-building, may increase a person's readiness to prefer dishonest decisions in ethical conflicts (e.g., not correcting an invoice that erred to one's own advantage, keeping the money from a wallet that one found, or making selfish decisions in social dilemma games (Camerer & Thaler, 1995; Marwell & Ames, 1981).

People who expect egoistic behavior from others may preemptively act egoistically themselves (Frank, Gilovich, & Regan, 1993). Expecting the selfishness of others motivates one's own selfish behavior, which may cause reciprocal egoistic behavior in others (Darley & Fazio, 1980). The questions that we are taught to

ask ourselvesmay be influential as well: Will this be profitable for me? Will it payoff?

6.1.2 What Does Self-Interest Mean?

Two postulates are axiomatic in the economic model of behavior:

– Rational choices between two or more options are guided by their expected usefulness. Rational choosers prefer the option they expect to serve their objectives best, whatever these may be.
– Rational actors try to maximize their own benefits rather than those of others. They care about the fates of others only insofar as these will impinge on their own goals. Benefits to others or the common benefit is only a by-product of rational choices.

The meaning of "usefulness" is an open question. The axioms would be trivial if they did not imply more than the assumption that everybody pursues his or her own motives or values, whatever these may be. What else? Actions may have various motives. If the axioms of the economic model are not to be considered trivial, the motive to maximize one's own benefits must be specified and distinguished from other motives. Self-interest is to be conceptualized as a specific motive that is distinct from other motives (Montada, 1998).

6.1.3 Self-Interest as a Motive: An Ill-Defined Construct

Self-interest is used with a broad spectrum of meanings: for example, improving or preserving income, wealth, power, rights, social status, privileges, social security, self-esteem, personal identity, social identity, etc. Is there anything that is common to all these objectives? They may all be valued as desired resources.

However, these objectives are multifaceted, and each facet may have various instrumentalities (e.g., self-esteem). Self-esteem can grow through achievements, social affiliations, by observing

moral norms, by acting according to standards of justice, by acting unselfishly, and so forth. This fact illustrates that the model is poorly defined. It can be interpreted arbitrarily. Self-interest as a human motive has no explanatory value if arbitrary post hoc interpretations are possible as is common in economic analyses of behavior (Ramb & Tietzel, 1993; for critical comments, see Green & Shapiro, 1994).

In such post hoc explanations, "seemingly" altruistic behavior is also ascribed to self-interest. Even seemingly unselfish behavior cannot shatter the basic assumption that self-interest is the fundamental motive for behavior. Caring for one's disabled parents can easily be traced back to selfish motives, such as a favorable self-presentation in public or the hope for a higher share of the inheritance. In politics, social welfare measures can be explained as strategic in view of upcoming elections. Avoiding opportunistic behavior in business can be explained as a strategy for maximizing one's long-term benefits.

With some ingenuity, it is easy to generate hypotheses to "unmask" every behavior as ultimately serving some self-interest. This kind of hypothesizing may be creative but cannot be taken as scientific proof for the suggested hypotheses (Bunge, 1989).

6.1.4 The Insinuation of Self-Interest as a Means by Which to Ignore and Disavow Justice Motives

No doubt, the "flag of justice" often serves to mask self-interest. Politicians may care about their popularity, and employers may care about their employees' productivity, which declines when employees feel they have been treated unjustly. However, a merely strategic concern for "justice" also indicates that the actors believe that justice is an important concern for others, a concern that they try to abuse in a "parasitic" way for their own selfish goals (Elster, 1989). Whether a person cares about justice categorically or for strategic reasons is open to question, unless we assess the actors' motives.

There are many cases in which the justice motive and self-interest are confounded. This is the case

when people feel entitled to claim return services, the share they subjectively deserve, the implementation of contracts, treatment equal to the treatment of similar others, support in cases of neediness, or compensation for damage or loss by the actors who are responsible for these. The fact that motives are confounded does not justify ignoring one of them.

6.1.5 Is Justice Just a Means for Serving Self-Interest?

The view that people care about justice as a means by which to pursue their own self-interest has also been prominent in social psychology (for a review, see Tyler, Boeckmann, Smith, & Huo, 1997). A core assumption in the equitytheory of social exchanges (Homans, 1961; Walster, Berscheid, & Walster, 1978) is that people prefer equity as a strategic choice in social exchanges in order to maximize their individual gains.

This calls for a critical clarification. It is plausible and well-evidenced that partners will be content if they perceive their exchange relationship to be equitable, meaning that the ratio of inputs and outcomes is similar for the interacting subjects. Equity is a prominent principle of justice in exchange relationships (there are plenty of other relationships, e.g., social role relationships, in which the concept of equity is not relevant.)

Those who care about justice within an exchange relationship will not maximize their own profit, but will strive for equity. Individual benefit from the relationship is possible only up to the point at which the exchange partners do not yet regard it as inequitable. This point cannot be defined universally, but rather must be probed for or negotiated in every individual exchange relationship.

Exchange relationships are often described as implicit or explicit contracts. Surely, contracts serve the concerns of the contracting parties, including their self-interests. However, contracts need the approval of all contracting parties when such parties are free to decide. We will return the justice of contracts later with regard to the issue of conflicts and their settlement.

6.1.6 Which Motive is the Basic One? A New Perspective on the Relation Between Self-Interest and the Justice Motive

The relation between self-interest and justice is not to be viewed as a one-way street as will be illustrated by the following study (Mohiyeddini & Montada, 1999): A scale was developed to assess the disposition to make self-interest a priority over justice with items such as: "It is more important for me to pursue my self-interest than to be just" and "I pursue my self-interest even if others are disadvantaged by it." The pattern of correlations revealed that concern for one's own self-interest results from subjectively experienced injustice. Preferring self-interest was correlated with (1) the perceived frequency of unjust victimizations, (2) the number of spontaneously remembered injustices experienced during the past couple of weeks, (3) the feeling that most people are better off than oneself, (4) the perception of being existentially disadvantaged in terms of one's childhood family, one's physical attractiveness, or one's gender, (5) the resentment that others are better off without deserving it, and (6) the perception that one lacks the self-efficacy to make the world more just.

While justice motives are often reduced to self-interest in economic analyses of behavior, this pattern of results suggests precisely the opposite: Self-interest results from frustrated justice motives. Similar evidence was found in a biographical questionnaire study: The number of injustices experienced in childhood and youth was correlated with an increased disposition to be self-interested (Münster et al., 2005).

6.1.7 Justice Motives Are Primordial Motives That Are not Reducible to Self-Interest

In psychological research, the existence of primordial, irreducible justice motives has frequently been verified. Such findings are intuitively convincing, for instance, in cases in which injustice is suffered by other people, when indicators of the justice motive are assessed, and when no confounded selfish motives are uncovered.

It is intuitively plausible to ascribe demands for more justice to self-interest when they are voiced from a position of relative deprivation (Crosby, 1976). But it is also important to note that relative deprivation does not originate solely in frustrated self-interest, but also in the conviction that the societal structures are unjust (Major, 1994).

Resentment is evidenced not only in cases of self-experienced injustices, but also in cases of injustice suffered by other people. Feelings of existential guilt have been observed in people living in relatively fortunate conditions when they become aware of the hard fates, the suffering, and the hardships endured by other people.

Existential guilt feelings and resentment about the undeserved disadvantages of other people have theoretically plausible correlates: (1) perceptions of existing inequalities as unjust and (2) the perception that one's own living conditions and the worse ones of others are causally related (in the sense that the inequalities could be reduced through a redistribution of resources). Both resentment and existential guilt stimulate prosocial commitments aimed at reducing such injustices (Montada, Schmitt, & Dalbert, 1986). Existential guilt tends to be a stronger incentive for personal sacrifices, and indignation disposes people to more often engage in political protest (Montada, Schneider, & Reichle, 1988). If people in privileged living conditions call for justice for the disadvantaged, self-interest is not a plausible explanation for this.

These studies also offer relevant information for answering the question of whether the call for justice can be traced back to self-interest. Can justice motives (represented by feelings of existential guilt and resentment about other peoples' disadvantages) be traced back to self-interest? The following indicators of self-interest have been assessed: (1) fear of personal losses due to the huge social inequalities that exist in the world and (2) angry indignation about disadvantaged people and the belief that their bad life situation is self-inflicted—implying the convictions that the seeming injustices are not actually unjust and that one's own personal advantages are legitimate

because they are deserved. These indicators of self-interest were not correlated with the indicators of the justice motive (existential guilt and indignation about injustice).

The aim of these studies was to disentangle the justice motive and self-interest by taking a look at people who are better off than the disadvantaged, who yet consider their views and standards of justice to be violated to their own advantage, and who feel morally uneasy about this. They feel responsible for helping to correct the existing injustices. Whereas it is easy to suspect that justice demands that come from a position of relative deprivation are caused by self-interest, it is not so easy when demands for justice for the disadvantaged come from a privileged position. Studies by De Rivera, Gerstman, and Maisels (1994) and Maes (1998, 2004) have corroborated these findings.

Phenomena such as survivor guilt, which has been described for Holocaust survivors (Baron, 1987) and Hiroshima survivors (Lifton, 1967), demonstrate that not every advantage is enjoyed by everybody. A person's relationship with disadvantaged victims is not conceived as a competitive one by all people. Instead, many people perceive disadvantaged victims as belonging to their own community of solidarity (Deutsch, 1985).

Economic life, too, is not always governed by selfish rivalry. Managers' feelings of guilt after layoff decisions (Lerner, 1996; Smith, 1994) indicate that management has more justice problems after layoffs than one would expect on the basis of the economic model of behavior. Guilt feelings by "survivors" of layoffs (Brockner, 1994) provide another example.

Research on individual differences in *justice-sensitivity* is informative in this regard. Individuals differ in how apt they are to perceive injustice and the intensity with which they react to it (Schmitt, Neumann, & Montada, 1995). Apart from that, people react with varying intensity to injustices they have suffered themselves (as a victim), to injustices they perceive in everyday life (as an observer), to injustices they passively benefit from (as a beneficiary), and to injustices they have actively committed (as a perpetrator).

Schmitt, Baumert, Gollwitzer, and Maes (2010) have developed a measuring device that allows justice sensitivity to be measured according to these four perspectives (victim, observer, beneficiary, and perpetrator) as comparatively stable dispositions. The four scales are highly reliable; their validity has been confirmed in numerous experimental, correlational, and field studies.

The different correlational patterns of justice sensitivity from the perspectives of observers and victims are instructive for the topic of this chapter. Victim sensitivity is more strongly correlated with self-related concerns (e.g., Machiavellianism, paranoia, suspiciousness, social mistrust, or jealousy), whereas observer sensitivity has a higher correlation with other-related concerns (e.g., empathy, role-taking, or social responsibility; Schmitt, Gollwitzer, Maes, & Arbach, 2005).

Similarly, Gollwitzer, Schmitt, Schalke, Maes, and Baer (2005) demonstrated that justice sensitivity from a beneficiary's perspective is connected to prosocial concerns (e.g., existential guilt, social responsibility, solidarity with the disadvantaged), whereas justice sensitivity from a victim's perspective is connected to self-related concerns (e.g., the denial of responsibility for the disadvantaged, or even fatal transgressions if the situation arises). These studies show that it is fruitful to address justice and self-interest as basic social orientations with the instruments of differential psychology.

6.1.8 Justice-Related Motives for Prosocial Commitments

Evidence for the prescriptive nature of justice is provided by observations of indignation over violations of a personal or socially shared justice standard. With regard to the economic model of behavior, such cases of indignation are especially instructive when subjects commit themselves to costly and risky actions to restore justice when none of their own self-interests had been violated.

It is not unusual for social movements to be initiated and supported by people without any vested interests of their own. The study by Fishkin, Keniston, and McKinnon (1973) on

activists in the civil rights movement is an illustrative example. Studies on ecological engagement deliver further evidence that feeds skepticism toward the assumption that self-interest is the cardinal human motive. There is rich evidence that perceptions of injustices that are caused by polluting activities and feelings of responsibility for future generations are much better predictors of pro-environmental commitments than self-interest in the sense of being personally affected by environmental pollution (cf. Kals, Maes, & Becker, 2001).

6.1.9 Self-Interest: Scientific Hypothesis or Anthropological Doctrine?

Trying to explain every action, emotion, appraisal, and judgment by means of self-interest would constitute a model of man with one single motive. A single-motive theory would have little value for explaining and predicting all undeniable inter- and intra-individual differences (Maes, 2004). Moreover, the explanatory potency of self-interest has been largely overestimated.

Miller and Ratner (1996) reported a series of empirical findings that demonstrate that, in explaining other people's behavior and attitudes, the impact of self-interest has been significantly overestimated in commonplace epistemology. The issues addressed in their research include attitudes toward abortions that are covered by health insurance, the treatment of minorities on university campuses, the willingness to donate blood, and participation in psychological experiments. It was found that, in reality, neither financial incentives nor vested interests had the level of impact expected by the public.

6.1.10 Retaliating Against Injustice Is Often More Important for People than Self-Interest

Surely, the justice motive can be confounded with self-interest, but it often comes into conflict with self-interest. By using experimental social dilemma games (e.g., the Ultimatum Game, the

Public Goods Game, or the Resource Dilemma Game), research in various academic disciplines has revealed a plethora of phenomena that do not fit the "rational-choice model" of economic theory, phenomena that can be understood only by assuming justice motives (Fehr & Schwarz, 2003; Gerhardt, 2007). For instance, people surrender personal advantages and accept considerable costs just for the opportunity to retaliate against the unjust actions of others (Fehr & Gächter, 2002).

6.1.11 Free Riding, Justice, and the Free-Rider Dilemma

In economic analyses of behavior, free riding plays a decisive role because free riding is seen as the incarnation of self-interest: A personal benefit can be achieved without incurring costs or investments. But justice motives also have to be taken into account when considering free riding. Free riding is not viewed as a rational choice in the sense of the economic model by those who invest time and money into an objective perceived as valuable, but it is rather an action that is indignantly criticized by such people (Fehr & Schwarz, 2003).

In public goods games, most players cease acting cooperatively and cease contributing to the growth of the public good as soon as they notice that their prosocial commitment is being abused by other players. How are we to understand this finding? Are such players merely protecting their self-interests because they expect losses due to the lack of cooperation of their fellow players, or are they responding to egoistical advantage-taking and exploitation by other actors? The punishment of free riders by cooperative players is exacted frequently, although it is costly to the player who administers the punishment too. The cessation of cooperative behavior would be the rational choice if players are simply guarding their self-interests. Punishing the exploitation of public goods corroborates the second hypothesis (Fischbacher, Gächter, & Fehr, 2001).

In a study on the motivation to control pollution (Montada & Kals, 1995), participants were asked to appraise several basic types of policies: appeals to avoid pollution, taxation of polluting

activities (e.g., energy consumption), the subsidization of environmentally friendly behavior and products, and bans on polluting activities and production processes.

The essential result of several studies was that a policy of appeals received the lowest ratings in terms of justice. The reason is that it allows for free riding and that those who act in accordance with the appeals (e.g., those who use public transportation instead of their own cars) contribute to the egoistical advantages of those who do not (i.e., the free riders) by making room for them. Taxation or bans were appraised as more just because they prevent free riding.

Another interesting finding was that there were many people who would be willing to act in accordance with the appeals, but who decide against doing so due to the injustice of free riding. They do not want to be the disadvantaged or the "dupes" with regard to the free riders.

Unpunished free riding is the best choice with regard to one's self-interest. But free riding can also be preferred by justice-motivated people in order to prevent the unjust advantages of free riders: If the normative context would have the free riders face sanctions, these justice-motivated people would readily act to support the common good. But as long as free riding is not sanctioned and is likely to be successful, justice-motivated people may be tempted to act in such a way that would not leave them disadvantaged compared with free riders. This is what we call *the free-rider dilemma.*

6.1.12 Justice and Self-Interest in Competitions

The participants in a competition expect that all actors will follow their self-interests. Self-interested behavior is legitimate, does not violate any norms of justice, and should not incur indignation or animosity from other actors. Diverging interests in markets can be negotiated in order to reach an agreement. Competitions do not pose conflicts as long as the rules are observed in sports, in markets, in the political arena, and elsewhere. There are winners and losers, but the losers have nothing to reproach the winners for. But when rules or norms are violated, indignation is

to be expected, and conflicts may arise if the norms are considered to be just. Norms limit the pursuit of self-interest. This will be the topic of the second part of this chapter.

6.2   Justice: A Universal Concern, a Source of Social Conflicts, and a Requirement for Peace

6.2.1   Justice: A Universal Motive Prompted by Diverging Convictions

Claims for justice and protests against injustice are ubiquitous in social life. Political movements, revolutions, and wars are initiated under the banner of justice. Justice is a prominent issue in all fields of politics. Indignation about perceived injustice is at the core of conflicts in private life. And the perceived injustice of fate is an issue that victims of misfortune have to cope with. The concern for justice seems to be an anthropological universal.

The broad spectrum of topics appraised with regard to justice. In order to become aware of the omnipresence of the justice motive, we need to realize how many actions, facts, events, etc. are rated as more or less just or unjust (Montada, 2003):

- Distributions of gains and losses, wealth and opportunities, rights and duties, burdens, risks, etc.
- Role relations and all interactions in which goods, services, love, loyalty, appreciations or depreciations, hostilities, and retributions are exchanged.
- Evaluations of achievements and failures.
- Normative standards in social systems, e.g., maxims in constitutions, the laws and institutions of states, religious norms, social role standards, and cultural rules for social interactions and relationships.
- The procedures for elections and decision-making in parliaments, courts, universities, companies, families, etc.
- Personal fates, which are deemed deserved or undeserved depending on the attributions of responsibility for the fate.

Whereas it may be assumed that *the justice-motive is universal,* it is a fact that *people's convictions about what is just and what is unjust are not at all universally shared.* Though everybody speaks of justice in the singular (Rüthers, 1991) as if a single solution would be the just one in every specific case, it is an incontestable fact that diverging principles of justice can be applied with good reason. Whatever the object of appraisal may be, when we ask heterogeneous samples of people, we get divergent opinions about what is unjust and what would be just.

Therefore, conflicts about justice are universal (Montada, 2012). This is true not only when specific issues are appraised, but we observe divergences also with respect to general maxims of justice (e.g., principles of just distributions). Opinions vary between cultures, contexts, and individuals. Is only one of these true and all others are wrong?

An example may illustrate the problem: Certainly, equality is widely accepted as a basic principle of justice, but what precisely is supposed to be distributed equally: freedom, rights, duties, opportunities, or outcomes in terms of wealth, health, education, social status, etc. (Kolm, 1996; Schmidt, 2000)? Human beings differ in many respects, but which differences are unjust and which ones are not? Is everyone to be treated equally or are only equals to be treated equally as Aristotle claimed?

6.2.2 Maxims and Views of Justice in Specific Domains

Justice of Distributions

Which inequalities between people can be seen as relevant with respect to the appraisal of distributions as just or unjust: gender, age, social status, kinship, national, ethnic, or religious memberships, needs (self-caused needs, diseases, and injuries, too?), merits, skills and expertise, bad luck, etc.? Or should various relevant inequalities be accounted for in combination?

Such questions are at the origin of debates about justice. Divergent answers may provoke

discord. The positions and arguments in disputes about such questions may be inspired by ideological convictions (e.g., egalitarianism, liberalism, a belief in social welfare, or utilitarianism). Human and civil rights are also a basis for pleas for justice. In philosophy and in the political arena, justice is debated without universal consent.

Walzer (1983) has somewhat neutralized the justice problems with inequalities with his concept of "*complex equality*," meaning that distributions in different "spheres of justice" (material wealth, social recognition in various contexts, political power, education, kinship and love, recreational time, etc.) are not perfectly correlated. Thus, a lower rank in one sphere may be compensated for by a higher one in another sphere. One must also take into account the fact that the subjective importance of spheres varies interindividually and interculturally.

Justice in Exchange Relationships

Reciprocity and equity are prominent principles of justice in exchange relationships. Social exchanges may be considered to be just if reciprocity is established; this also applies to negative exchanges according to the metaphor of "an eye for an eye and a tooth for a tooth."

Equal mutual advantages are also assumed in the sociological theory of social-role-bound exchanges (teacher–student, physician–patient, employer–employee). However, this equality postulate has been criticized for good reason (Gouldner, 1960). Some roles are much more rewarding or profitable than their complementary ones.

The actors in exchange relationships may not be equal, for instance, with regard to their age, health, abilities, wealth, etc. These and many other inequalities have to be considered when the justice of exchanges is evaluated. In many relationships, equal mutual advantages are not possible or expected. Nevertheless, the exchange relationship may be evaluated as just, especially when the equity principle is applied.

Equity means equal ratios of investments/costs and outcomes/benefits for all parties involved. In fact, it is the subjective appraisal of these ratios rather than the objectively measured balances that are crucial. Subjectively, various

exchanges (goods, services, love, respect, trust, loyalty, harm, negligence, hostility, etc.) may be focused on and appraised as balanced.

In many close relationships, all services may be compensated for by gratification or love. Teachers will be motivated to give their best and feel justly gratified by the progress of their pupils. *The type of relationship is crucial.* In the marketplace, exchange relationships are not the same as in families, friendships, teams, clinics, and others (see also Lerner & Clayton, 2011). Consequently, the justice standards are not the same either.

Retributive Justice for Offenses

What is a just punishment for offenses? The main principle of retributive justice is specified as the proportionality of punishment or guilt for misdeeds. Again, inequalities between actors and the specific features of the action context are to be considered. The fault of a young offender may be qualified by his biography, his social context, or by the situational specifics of his offense. Impartiality does not mean that the same standards are applied to all defendants.

The justice of retribution may be questioned. In *restorative justice*, the reintegration of the offenders into the community and reconciliation with their victims are the aim rather than retribution (Rössner, 2004). An admission of fault is a step toward the reintegration of an offender into society. Offenders may reconcile with their victims by means of sincere apologies or recompenses. In cases where there is a history of interaction between an offender and a victim (e.g., in a mobbing), it may be productive for the victim to learn more about the offender's motives and whether the victim's behavior played a role in provoking the offender.

But before asking for the justice of retribution, the justice of norm violation should be reflected upon. *What is considered an offense, a crime, or a sin?* The answer varies with national or religious laws or the informal normative standards of a community. Atrocities legalized by the laws of a totalitarian regime will not be punished in such a state. The charter of human and civil rights may motivate and justify protests against the injustice of a national or religious criminal law. In democ-

racies as well, many criminal laws are disputed for good reason.

The Justice of Constitutions and Laws, the Bans and Rules of Religions, and Further Codes of Norms and Rights

A look at the codes of normative maxims and rules provides evidence for countless divergences:

- The constitutions and legal codes of states diverge greatly.
- Every law can be criticized on the basis of some justice principle.
- Legal codes may violate human rights or the laws of some religion.
- The charter of human rights contravenes the normative traditions of some cultures. It is open to question whether the dignity of human beings may be universally determined or whether it may be specified according to culturally shared values or according to individual values as formulated, for instance, in living wills.
- Different cultures have diverging conceptions of justice, morality, social roles, and standards of respectful behavior and honor, etc.

Many codes of normative rules reflect formerly or currently predominant views of justice within a society or community and may have an impact on the shaping of the sense of justice of individuals and collectives. Within pluralistic societies, various and diverging sources guide the normative convictions of certain parts of the population and of single citizens.

Measures to Prevent or to Correct Injustices May Create New Injustices

Some examples may illustrate this fact:

- Justice for defendants may mean injustice to the victims of crimes. When the "benefit of the doubt" is granted to the defendant (which doubtlessly represents significant progress in the history of criminal law), the victim's demand for punishment and compensation may be violated, assuming that the victim has no doubt that the defendant is guilty (Orth, 2000).

- Legal punishment for crimes may be deserved, but it also bears the risk of unjust social discrimination against those close to the perpetrator (e.g., the perpetrator's children) who are not responsible for the punished deed at all.
- Are typical *affirmative action policies* a just compensation for the unquestionable historical disadvantages of women in the labor market? There are good reasons for efforts to reduce such disadvantages. It is open to question, however, whether it is just to compensate for historical disadvantages by issuing policies that favor young women who have personally not been disadvantaged and who are in competition with young men who have personally not been advantaged. Therefore, problems with the justice of affirmative action policies are reasonable (Taylor & Moghaddam, 1994).

The fact that most interventions have branched effects in social systems makes it difficult to avoid new injustices (cf. Ittner & Montada, 2009). Efforts to establish justice have to be diligently checked for risks of new injustices. Hence, *experience, expertise,* and *intelligence* are needed. Moreover, *wisdom* is required for appraising the validity of justice beliefs and claims.

6.2.3 Perceived Injustice: The Source of Social Conflicts

At its core, any social conflict is a justice conflict (Montada, 2015). People expect others to respect the normative standards, rights, and claims that they consider to be just. Conflicts result from violations of normative expectations of how other people, authorities, etc. have to behave, from disregarded claims, whatever their normative basis may be: human rights, a legal code, the codex of a religion, a formal or an implicit contract, or the good manners of a culture. It is crucial that people consider their own convictions to be legitimate and as their right to claim.

Diverging interests, preferences, opinions, beliefs, etc. may bear the risk of creating conflict, but only if they violate the normative convictions and expectations of other people. Otherwise, they will be tolerated as legitimate. Conflicts arise when the interests, beliefs, etc. of others are resented as illegitimate, illegal, perilous, disrespectful, offensive, etc. Diverging beliefs may be viewed as a matter of personal freedom, or they may be condemned as treason or as a threat to the community.

If all actors in competitive markets and sports are viewed as behaving according to "the rules" (e.g., pursuing their legitimate self-interests and goals), frustrations and losses are common, but this does not evoke resentment. There are winners and losers but not victimizers and victims. Losers may have performed poorly, they may have been unfortunate, but they have nothing to reproach the winners for unless they believe that the competition was not conducted fairly. Receiving unjust treatment is quite a different experience from losing a game.

Nonetheless, competition may not be considered legitimate in every social context by everybody. In some social contexts, solidarity and mutual support may be the expected norm (e.g., within families, close partnerships, friendships, and when a goal that requires cooperation is at stake).

When searching for the common core of all social conflicts, we will find manifest or latent resentments and reproaches—one-sided or reciprocal ones (Mikula & Wenzel, 2000). In conflicts, people may claim justice for themselves or for others for whom they feel sympathy, responsibility, or loyalty. These claims will be refused or answered by a counterreproach when the addressees are convinced that their own behavior is justified by legal, moral, or social norms, as a legitimate self-interest, or as an adequate retaliation to an antecedent behavior enacted by the claimant.

Resentment is the key indicator of conflicts. A look at aggression research reveals that it is not mere frustration that instigates aggressive tendencies, but only "illegitimately" caused frustration (Moore, 1978), implying the violation of a

legitimate expectation, the violation of a valid norm or rule.

Relative deprivation instigates aggression if it is considered unjust (Crosby, 1976). Aggression theories, which emphasize anger as an emotional antecedent of aggression, share this basic assumption (Berkowitz, 1993). Aggressive acts may have other motives (e.g., selfishness, envy, or striving for power), but resentment is a frequent one.

Resentment implies the assumption that "the perpetrators" are responsible for their actions and do not have a reason to justify such actions. *Sincereapologies can be used toreduceresentment and settle conflicts.* This fact corroborates the key role of the violation of justice beliefs in conflicts.

As Goffman (1971) has emphasized, the perpetrator can express that he or she fully shares the victim's view on the issue by expressing remorse and issuing an apology. He or she must express that he or she considers the violated norm to be a valid one, concede to having violated the norm and to being responsible and blameworthy because the offense was not justified. It has been empirically demonstrated that sincere apologies appease victims as well as judges and observers and that they reduce the desire for retribution (Ohbuchi, Agarie, & Kameda, 1989; Vidmar, 2000). A perpetrator's effort to provide compensation has similar effects and implies all the components of a sincere apology (Darley & Shultz, 1990). The courts, too, reduce penalties when an agreement is reached in perpetrator–victim reconciliations (Rössner, 2004).

In escalated conflicts, sincere apologies by one party may not be expected as the adversaries may justify their own offenses as retaliation against antecedent offenses by the other party. Who would want to be the first one to concede unjustified offenses? One strategy that can be applied to make use of the pacifying potential of apologies may be to motivate all parties to concede their own offenses simultaneously. Preferably, this would be done without any specifications in order to avoid new disputes concerning the details of past conflicts.

Qualifying attributions of responsibility. An attribution of responsibility can be qualified or recog-

nized as an error (Hamilton & Hagiwara, 1992). If a person did not have volitional control over his or her behavior due to a lack of competences, fatigue, external forces, effects of drugs, etc., he or she may not be responsible. If the consequences of an action were not foreseeable, then nobody is held responsible either. Less responsibility will be attributed when malevolent intentions are no longer presumed, and when, instead, the behavior is qualified as careless or as well-intended but poorly executed. Responsibility can also be denied by asserting that the "victim" had consented to participate in a risky activity with a bad end (e.g., losses in stock markets).

Qualifying blameworthiness with justifications. The blameworthiness of an actor can be qualified by providing convincing justifications: offering good reasons for the offending behavior, for example, by making reference to legitimate self-interest, to professional or social obligations, or by claiming the right to defend one's freedom or one's reputation. Quite often, one's behavior is justified as retaliation against another's misdeed. Justifications may be convincing and will then be accepted. In that case, they reduce resentment.

6.2.4 The Role of Self-Interest and Further Personal Concerns in Social Conflicts

Indignation varies with the personal importance of self-interest or further personal concerns affected by the offending behavior. "Concerns" refer to everything that is important to people, to which they aspire, or that they defend or claim for themselves and for others: freedom, security, peace, prestige, love, the common good, human rights, religious beliefs, and much more. Indignation also varies with the proximity to affected third parties. Injustices that affect persons close to oneself trigger more indignation than injustices committed against strangers. Therefore, relativizing the subjective importance of the personal concerns that are affected is a strategy that can be applied to mitigate a conflict.

6.2.5 Justice: A Requirement for Peace

How can conflicts be settled? How can peace be preserved? Various procedures are to be considered. Two prototypical ones will be discussed briefly: (1) decisions by authorities and (2) conflict mediation.

Decisions by Authorities

Judges, arbitrators, and other authorities are frequently called upon to solve social conflicts. Peace is restored when the conflicted parties accept the decision as just. The perception of *procedural justice* is a crucial factor for the appraisal and acceptance of a decision.

Traditionally, the justice of decision making is defined by a set of procedures: impartiality of the authorities, consistent use of arguments, consideration of relevant information, objectivity in the use of information, and the revision of decisions if new information becomes available (cf. Leventhal, 1980). From a psychological perspective, these principles are often not sufficient and are often not the most relevant ones. Being given a voice—meaning the opportunity to present one's own views and claims and to have an influence on the decision-making process—is very important in addition to decent and respectful communication on the part of the authorities (Lane, 1988; Lind & Tyler, 1988).

These hypotheses have inspired research that has generated an impressive body of knowledge about the impact of styles of communication and personal treatment by authorities. Experienced procedural and interactional fairness has positive effects on perceived status and self-esteem, on the acceptance of the decisions, and on the trust placed in authorities and the legitimacy of institutions. There is ample evidence of what has been dubbed "the fair-procedure effect," which refers to the phenomenon that perceived procedural fairness helps the parties involved to accept even those decisions or outcomes that are less favorable than they had expected or hoped for (Tyler et al., 1997; Vermunt & Törnblom, 1996).

Settling Conflicts via Mediation

Basically, two approaches that can be used to settle a conflict can be distinguished: (a) normative discourses and reflections on conflicting normative convictions, and (b) reflections on the subjective importance of personal concerns affected by the conflict.

Discourse About Conflicting Convictions

In conflicts, both opponents are convinced that their own views and claims are in the right and that their adversary is wrong. It is "the nature" of normative beliefs that their validity is taken for granted and, consequently, that they have to be respected by everybody. Conflicts about diverging normative beliefs cannot be settled with simple compromises. The approach used in mediation is to reflect on the conflicting beliefs and positions using normative discourse.

In philosophy, ethical discourse may aim to gain knowledge about universal ethical truths (Apel, 1976), but as argued by Habermas (1993), the justification of the validity of a moral maxim or principle needs to be distinguished from the justification of decisions in concrete cases, where competing principles are considered relevant with good reason.

The aim of conflict mediation is to settle an actual conflict by an agreement that allows productive and peaceful future exchanges between the opponents.

The aim of discourse in mediations is not the search for universal ethical truths, but the furthering of the insight that good reasons can be put forward not only for one's own normative views and claims, but equally for the opponent's views and claims.

Mediators try to generate a culture of communication similar to the one that was designed for ideal ethical discourse: A rhetoric of persuasion and manipulation is banned, and mutual understanding and unbiased deliberation are actively supported. One major goal is to impart insight into normative dilemmas that underlie the conflict; a second goal is to further the mutual understanding of diverging views on the relevant facts.

Imparting insight into existing normative dilemmas. Settling conflicts is facilitated when the

opponents acknowledge that diverging norms or principles of justice may be advocated for good reason (i.e., that a normative dilemma exists, and consequently, that neither party is solely right or wrong). If the opponents recognize that their conflict reflects a normative dilemma, they no longer view the position of the other side as completely illegitimate and their own position as the only legitimate one. Thus, every claim that a single principle of distributive justice has exclusive validity should be questioned in conflict mediation (Montada & Kals, 2013). Two examples illustrate this statement:

- Should the inheritance left by parents be divided equally among their children, equitably according to their merits (e.g., the care they provided for the parents, their contributions to the social status of the family), or according to their need (e.g., their income or the number of children still in school)? Should persons who have been very close to the parents receive a share as well?
- Which employees should be dismissed first when business is slow? Several justice principles may be considered: seniority, acquired merits from previous performances or loyalty, employees' current performance level, need (e.g., number of dependent children), gender, age, nationality, etc. Moreover, should employers have the right to decide at their own discretion or should a work committee have a say?

Conflicting claims for justice are deliberated innormativediscourse. When good arguments are put forward, opponents may qualify their views and claims. All parties must recognize that none of the conflicting claims is the only valid one. Many maxims may be applied with good reason in a specific case. For instance, applying one single principle of distributive justice would violate all other principles that might be taken into consideration as well. When the opponents come to realize that a dilemma underlies their conflict, the conflict will be defused, which might in turn be a good precondition for future cooperation.

It lies within the wisdom of institutions to consider various principles of justice in their regulations and decisions. The social market economy, for instance, is an attempt to harmonize the rights of all citizens to free economic activities with the maxims of the social welfare state. Rawls' "maximin principle" is also a suggestion for combining the freedom of economic activity—which produces common wealth—with the entitlement of every citizen to participate in the common prosperity (Rawls, 1971). This holds true as well for the basic maxims of the French Revolution: equality, freedom, and fraternity. Applying only one of the three maxims at the exclusion of the other two would result in quite different constitutions of the state, and none of them would be productive.

In many institutional decisions about the allocation of scarce resources, several principles of distributive justice are considered. This is evidenced by comparative research on the allocation of university positions, subsidized housing, transplants in medicine, legal regulations for the layoff of employees, etc. (Elster, 1992). Giving consideration to these facts as well as to observations that various norms of justice are used in different spheres of justice (Walzer, 1983) may help to qualify a rigid insistence on one single maxim.

Another strategy may be to remind the opponents that they themselves are accustomed to applying different principles of justice in different situations and contexts. In order to transcend the actual conflict between the opponents, mediators may offer further normative standards that are or could be applied in similar cases. Becoming aware that their conflicting claims are not the only ones that can be advocated contributes to their ability to take a different perspective.

Settling conflicts is facilitated when opponents realize that diverging principles of justice may be advocated with good reason. When the parties recognize that a justice dilemma exists, they no longer view the position of the opponents as completely illegitimate and their own position as the only legitimate one.

It is surprising that concerns for justice are not a central issue in the literature on conflict mediation (cf. Montada & Kals, 2013). Even warnings to bring up justice issues can be found (cf. Pruitt & Carnevale, 2003). But normative standards

cannot be excluded when social exchanges are appraised. Normative standards are crucial in social conflicts, and they are crucial for the resolution of conflicts and for agreements about exchanges in the future.

Qualifying the Subjective Importance of the Conflict

Focusing on the normative core of conflicts and reflecting on diverging normative convictions is one strategy in conflict mediation. We will mention some other strategies without going into detail.

Heavy conflicts frequently produce closed-mindedness. The opponents are no longer aware of the entire spectrum of their important concerns, their self-concepts, and their self-interests. They seem to be "out of their minds." Both the blameworthiness of the adversaries and the impairments caused by them are frequently exaggerated. An injury caused by a biker in a pedestrian precinct will be dramatized compared with a similar injury resulting from a person's own imprudence.

Therefore, qualifying the subjective valence of the conflict and its costs may open people's minds and get them to think about constructive solutions. *The general advice is to transcend the conflict.* Several strategies may be used in mediation (Montada & Kals, 2013).

Without going into detail, some strategies in mediation consist of:

- *Making opponents aware of the spectrum of their concerns and their self-concepts.*
- *Exploring opportunities for positive exchanges.* One of the important changes in perspective in mediation is the change from negative exchanges to the opportunity to engage in positive exchanges (i.e., positive with respect to the important concerns of both parties).
- *Considering the concerns of affected third parties.*Many conflicts affect and impair third parties who are not directly involved. Conflicts between parents have effects on their children, grandparents, and others. Conflicts in the workplace may have an impact on colleagues,

on the entire organization, on the employees' families, etc. The same is true for conflict resolution: though not directly involved, third parties are affected. Reflecting on the concerns of important others constitutes a change of perspective and may qualify the subjective perceptions and importance of the conflicting positions.

- *Makinginternal conflicts explicit.* Opponents in a social conflict may vigorously hold a claim by repressing their own doubts and internal conflicts with regard to their own position. Making these visible again may reduce the amount of social conflict and facilitate discourse about, for example, the complex issues of personal freedom in close relationships or about the shared responsibilities of both parents for their children.

Using these and additional strategies, the conflict can be transcended and new perspectives can be developed, and this may allow opponents to qualify the views and claims they hold in the conflict and encourage the opponents to explore new options for social exchanges.

6.2.6 Settling Conflicts with a Just Agreement

Conflicts are social exchanges. They result from perceived violations of or threats to normative expectations and subjective entitlements. Conflicts may be costly for one or for all parties. They may provide a mortgage for future exchanges or even end in the destruction of social relationships due to long-lasting hostility.

Productive and sustainable conflict resolutions require that a new basis and/or new contents for exchanges are found or created. In the agreement, it might be specified whether and how impairments from the past will be compensated, what will be exchanged in the future, and what rules will be observed in these exchanges. These questions have to be answered with reference to justice. Exchange relationships are peaceful and productive only if they are considered just.

6.2.7 The Justice of Contracts

The contract is a prototypical form of the regulation of social exchanges. Contracts are regarded as just when the partners are equally informed and equally free to give their consent (Nozick, 1974). In conflict mediation, the ultimate criterion for the appraisal of a solution as just is the free agreement of the parties.

A contract that the parties have agreed upon freely and of which they are equally informed cannot be unjust. Justice would be violated if relevant information was withheld, if pressure was exerted, or if a party was not free to refuse the contract on account of a predicament (e.g., neediness).

Because contracts are of eminent importance in social life, many legal norms that specify the obligations of the contracting parties have been established. Above all, specific legal rules have been established to protect the supposedly less powerful or less informed parties.

The justice of contracts with regard to third parties. Assessing the justice of contracts would be incomplete without taking into account their impact on third parties. Adverse effects on third parties raise new justice problems. Contracts may be fair with respect to the exchanges between the contracting parties, but may be seriously unfair with respect to third parties or the larger community. For instance, cartel contracts may be fair for the contracting parties, but they are made at the expense of others.

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The Justice Motive: History, Theory, and Research

John H. Ellard, Annelie Harvey,
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The "belief in a just world" is an attempt to capture in a phrase one of the ways, if not the way, that people come to terms with—make sense out of—find meaning in, their experiences

— Melvin J. Lerner (1980)

Why do people care about justice? The answer from the social sciences and philosophy has varied over time but retains a common theme: the concern for justice is derivative of other more basic concerns. Most common is the idea that as a social species humans care about justice because it is in their best interest to do so. Early formulations explicitly characterized justice as something people embrace to maximize their outcomes and promote their goals and values while at the same time accommodating interdependency with others (Walster, Walster, & Berscheid, 1978; Deutsch, 1975). Philosophers have also emphasized the role of justice motivation in balancing collective and individual interests through a "social contract" (Rawls, 1971). More recent social science approaches have also recognized the importance of social connectedness and status ranking for humans, with justice being a mechanism for establishing and main-

taining standing and legitimacy in the group. This approach has offered insight into why people are sometimes more concerned with justice procedures than justice outcomes (Brockner & Wiesenfeld, 1996; Lind & Tyler, 1988; Tyler & Blader, 2003; see also Lerner & Clayton, 2011 for an extensive discussion of justice and self-interest).

In contrast to the idea that justice motivation is necessarily derivative of other ostensible more basic concerns, the theory and research discussed in this chapter are founded on the proposition that human beings have a functionally autonomous need for justice that emerges as part of normal cognitive development. This perspective emphasizes the extent to which justice is a central organizing theme in people's lives that manifests itself in the many and varied ways people demonstrate a need to believe in a just world, where not only they but also others get what they deserve (Lerner, 1980). Indeed, the commonplace sensitivity people everywhere have to injustice experienced by others is a hallmark of justice motive theory. To understand, for instance, why people are easily angered and sometimes moved to take action in response to the suffering of complete strangers in faraway places and far removed from self-interest, one needs an account that recognizes that people have more than a pragmatic commitment to justice. Justice motive theory does so by highlighting the symbolic significance

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justice has in people's lives. The justness of other people's fates is relevant because our own goal pursuits are meaningless if we cannot believe that we live in a world where people get what they deserve. Thus, the centrality of the belief and resulting need for justice is essentially existential.

Melvin J. Lerner has generated most of the theory about the justice motive and contributed significantly to the related body of empirical work (see Lerner, 1977, 1980; Lerner & Clayton, 2011; Lerner & Miller, 1978; Lerner, Miller, & Holmes, 1976 for theoretical statements). An initial impetus for Lerner was his observation that people, including sophisticated, well-educated people, often respond to injustice not with moral outrage but with a seemingly irrational tendency to blame or derogate victims. Why would people do this? The need to believe in a just world emerged as his answer to this puzzling behavior. His analysis centered on the importance of deservingness for people. Building on the well-documented priority people give to evaluating both people and their outcomes (Goodwin, Piazza, & Rozin, 2014; Tesser & Martin, 1996), he argued that people also appear to care a great deal about deserving: if good things happen in the world, we much prefer that they happen to good people and if bad things must happen, we equally prefer they happen to bad people. In other words, we need to believe that people get what they deserve. Lerner's insight was that the concern for deservingness is sufficiently central for people that it can be described as a need to believe in a just world. The metaphor of "just world" was intended to capture the symbolic significance of deservingness for people.

This chapter provides an overview of theory and research that has followed from Lerner's basic premise that the justice motive is a foundational component of everyone's psychology (Lerner & Clayton, 2011). This work has explored the implications of the need to believe in a just world for how people construe daily experience in a manner that sustains the implicit assumption that the world is just. Scholarship reported here is from largely experimental investigations of

how the justice motive informs reactions to the various outcomes people experience for both self and other. Another project that emerged in response to Lerner's discussion of the belief in a just world has focused on just world beliefs with particular emphasis on individual differences in belief type and strength. That work is reviewed in a separate chapter in this handbook (Hafer & Sutton, 2016, Chap. 8). The relationship between just world belief research and the scholarship discussed here will be revisited at the end of this chapter.

Lerner's early investigations focused on the construal-altering potential of deservingness concerns in situations where observers learned of injustice to another in the form of a completely fortuitous good or bad outcome (Lerner, 1965; Lerner & Simmons, 1966). Observers in these studies were fully aware that who got what outcome was from their perspective, random. Thus, any rational understanding of the "victim's" or "winner's" character or feelings of liking for them should have been unaffected by knowing about the good or bad outcome. Yet, observers in these situations reacted in a manner that appeared to reflect their need to believe in a just world. For instance, in a study of reactions to an innocent victim, observers watching someone receive electric shocks were moved to devalue her character, and the magnitude of the derogation varied with duration of her suffering and hence injustice (Lerner & Simmons, 1966). In a study of positive outcomes, arbitrary allocation of a reward to either "Tom" or "Bill" following work performance influenced observer construal of the recipient's effort and contribution to the work in a way that revealed their deservingness concerns (Lerner, 1965). The reward recipient, either Tom or Bill, was perceived to have expended more effort and made a greater contribution than his coworker. In this case, deservingness informed observers' construal of the behavioral antecedents of the outcome. For instance, if Tom received the reward, participants construed his contributions in a manner that made him more deserving of the reward than Bill. In essence, observers reasoned backward from the random outcome to

make the situation be anything but random: if you got the reward, you must have deserved it.

These seminal investigations established the usefulness of the need to believe in a just world as a way of understanding why people care about justice and why, as a result, they will sometimes react to injustice in seemingly irrational ways. The early investigations inspired research that continues to examine the nature of the justice motive and its implications for everyday experience. Before considering what the research has taught us, we focus on a basic question: Where does the justice motive come from?

7.1 Justice Motive Origins

Like Piaget before him, Lerner grounded his thinking about the origins of concerns with justice in important early experiences and associated cognitive development (Lerner, 1977). In the preschool years, typically around age four or five, children are able to contemplate the significance of time in their lives; that in addition to the significance of day-to-day pleasures and hurts, so too are there possibilities for good and bad experiences in the future. This capacity for understanding the future as different but linked to the present is assumed to emerge in concert with a child's ability to delay gratification (Mischel, 1974) and accompanying ability to represent a connection between present and future self (Lemon & Moore, 2007). As children learn to inhibit their impulses and instead delay immediate gratification in the expectation that their extended efforts will yield an even bigger outcome they in effect establish what Lerner calls their *personal contract*. To be viable the personal contract requires a further assumption: if present actions are expected to yield future outcomes in any sort of predicable way, then one has to be able to assume an environment or "world" that is sufficiently stable and predictable to support a personal commitment to the future.

The commitment to deserving is based on the additional further but essential corollary assumption: "if I delay gratification in the expectation

that I will later get what I am entitled to, then I need to believe that I live in a world where *other* people get what they deserve too. Evidence to the contrary may threaten my own entitlements." Thus, the concern goes beyond a need for stability or controllability. The personal contract and need to believe in a *just* world become a *moral imperative* that people get what they *deserve*. Investigations with children have produced evidence that the developmental milestones of delay of gratification and personal contract do appear to coincide with a child's sense of deserving in allocation and altruism contexts (Braband & Lerner, 1974; Long & Lerner, 1974). More recent work has found that the emergence of the ability to delay gratification is also linked to the tendency for children to align their liking of another child with whether or not the other child experienced a "lucky" or "unlucky" outcome (Whalen, Ellard, & Graham, 2009). The link between long-term goals and just world beliefs that form the basis of the justice motive persist in adulthood (Callan, Harvey, Dawtry, & Sutton, 2013; Callan, Shead, & Olson, 2009; Hafer, 2000a; Hafer, Bègue, Choma, & Dempsey, 2005). For instance, Hafer (2000a) found that inducing a focus on long-term investments increased the tendency for her research participants to derogate innocent victims.

An important implication of Lerner's analysis of the development of the justice motive is the notion that other sources of just world thinking, such as recurring cultural references to people getting their just deserts in books, movies, and video games, are neither necessary nor sufficient to produce the *need* to believe in a just world. Indeed, the persistent theme across time and culture that the "good guys" ultimately prevail and the "bad guys" get their just deserts may be an inevitable cultural expression of the universal need for affirmation that the world is ultimately just.

A less empirically explored aspect of Lerner's developmental theorizing concerns the origin of different *forms* of justice. The social justice literature has devoted considerable attention to the contextual and relationship determinants of preferences for justice as equity, equality, or

responsiveness to need. Justice motive theory locates preference for these different forms of justice in how the experience of deserving is conditioned in the first instance by a developing child's sense of relatedness to others beginning with feeling identified with others (identity relation, e.g., parent–child), and then later coming to distinguish feeling of being similar to others and part of the same group (unit relation, e.g., work or sports team), from feeling fundamentally different from others (non-unit, e.g., outgroup). With the latter distinctions in place, the matter of "who" deserves "what" is aligned with these different relationship experiences (Lerner et al., 1976; Lerner & Whitehead, 1980). When we feel identified with others, our typical justice preference will be based in the entitlements of need. Feeling similar to others produces a justice preference for equality and feeling different yields a preference for equity (Lerner, 1977). The structure of the situation further conditions justice preference so that it matters, for example, whether the context emphasizes competition or cooperation. Thus, finding oneself competing with a close friend might yield a preference for a form of competition where the dominant experience is the intrinsic pleasure of the game rather than the outcome (Lerner & Whitehead, 1980, p. 241). Investigations with young children have found that children's justice judgments when asked to allocate resources varied as a function of the relative salience of ingroup/outgroup cues (gender, race), but these judgments were further influenced by whether the context was competitive or cooperative (Towson, Lerner, & de Carufel, 1981; Lerner & Grant, 1990. See also Lerner & Clayton, 2011, pp. 165–188, for discussion of a high impact field experiment examining the same forms of justice hypotheses with adults in a real work situation).

While Lerner's analysis of the development of different forms of justice has received limited empirical attention, it does highlight an important difference in approach to the nature of justice generally. Whereas other approaches have produced distinct bases for justice motivation such as distributive, procedural, and interactional justice (cf. Jost & Kay, 2010), justice motive theory

views all of these as founded on the same fundamental concern with deservingness. From a justice motive perspective, procedural justice reflects the sense people have that their standing in a situation includes certain entitlements such as having a voice in decision-making (Folger, 1977) or confidence that one's interests are properly represented (Leventhal, 1980). More recent elaborations have argued that many procedural justice effects devolve to expectations people have about being valued, respected, and understood (Tyler & Lind, 1992); expectations that in justice motive terms are based fundamentally on the sense people have about the treatment they deserve from others (cf. Miller, 2001). Thus, there is potential for convergence between justice motive theory and procedural and interactional justice theories to the extent that people experience respect, status, and prestige much like any other outcomes with respect to deservingness (cf. Ellard & Bates, 1990; Heuer, Blumenthal, Douglas, & Weinblatt, 1999; Lerner, in press).

7.2   The Nature of the Justice Motive

Cast in terms of contemporary motivational theory, the justice motive has as its goal the ability to believe, or more precisely, *assume* that the world is just. Accordingly, research to date has conceptualized the goal in homeostatic terms in which the assumption of the world being just is the desired state. This is in contrast to viewing the justice motive as an ongoing open-ended pursuit of "justice."[1] The distinction is analogous to the difference between prevention vs. promotion motivation in regulatory focus theory (Higgins, 2000; Molden, Lee, & Higgins, 2008). The justice motive conceptualized in homeostatic just world terms fits the profile of prevention motivation where the desired state is a sense of security and calmness in *assuming* the world is just. As a result, efforts at understanding justice motive

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[1] Dalbert (2001) develops a different conceptualization of the justice motive that does emphasize ongoing striving for justice as a marker for justice motivation.

dynamics have focused on how people deal with and strive to avoid threats to the belief (cf. Molden et al., 2008, p. 170).

In characterizing the motive as a need to *believe* in a just world, Lerner used the notion of "belief" in a manner that is different from our everyday understanding of believing something. As the opening quotation suggests, the phrase "belief in a just world" was intended to be a way of summarizing the dynamics of a foundational assumption people need to retain that seldom, if ever, appears in consciousness the same way beliefs do. As a result, the need to believe in a just world is probably better understood as the need to be able to *assume* the world is a just place, in much the same way Bowlby describes the legacy of the attachment process being "working models" people have of themselves and their relationship to the world (Bowlby, 1969, 1973, 1980). Lerner's just world, like Bowlby's working model, does not exist in conscious awareness, but nonetheless pervasively affects how people perceive and experience daily life.

Much has been learned about the various strategies and resources people draw on to sustain their belief in a just world. General characteristics of motivation and its relationship to cognition and behavior are apparent in this body of research. One important feature is *equifinality*: the idea that the goal of believing the world is just is attainable using a number of different strategies (Heider, 1958; Kruglanski, 1996). For example, in the seminal Lerner and Simmons (1966) research, when participants believed their actions would end the suffering of an innocent victim, they did not derogate the victim, but did derogate when they were not given the opportunity to act or were uncertain about whether or not their decision to act actually addressed the injustice. This example also demonstrates *substitutability*: different strategies for maintaining the belief in a just world that are mutually substitutable or functionally equivalent (Kruglanski, 1996, p. 503).

A particularly important consideration for understanding justice motive dynamics is the matter of how it appears in people's lives. Are people aware of their need to believe in a just world? Theory and research to date suggest that the justice motive, like many human motives, informs people's experience in ways that are largely outside of awareness (Lerner & Goldberg, 1999). Indeed, people, if they are at all aware of events around them, will readily acknowledge that the world is not a just place. Thus, much of the research documenting justice motive processes has relied on indirect evidence, such as victim blaming following a just world threat induction. More recent work drawing on methodological advances for examining implicit processes has yielded more direct evidence of justice concerns being involved in previously documented reactions to just world threats (Hafer, 2000b).

Because justice motive processes and outputs are both introspectively opaque and empirically documentable only by indirect inference, precise interpretation of the manifest expressions of the motive can be difficult given other normatively based ways in which people make sense out of their own and other people's behavior. If someone blames a victim for what happened to them, is the judgment the product of implicit justice-motivated cognitions or the result of thoughtful and conscious application of norms of culpability and blame? Possible answers to such questions follow discussion of what is known about how people maintain their belief in a just world.

7.3 Maintaining the Belief in a Just World

7.3.1 Reactions to Injustice: Motivated Behavior and Cognition

The most compelling evidence for the justice motive comes from people's reactions to undeserved suffering and misfortune. Given the importance of the need to believe in a just world, Lerner (1980) argued that people engage in various cognitive and behavioral "strategies" or "tactics" to maintain a perception of justice in the face of threat which are more or less equifinal and substitutable. Furthermore, the strategies people employ can be either rational or nonrational (Lerner, 1980).

7.3.2 Reacting to Injustice: Rational Strategies

Rational strategies involve taking action, often with a focus on victims: attempting to limit injustices before they occur (e.g., supporting welfare policies to assist underprivileged children) or compensating or helping victims after an injustice has occurred (Hafer & Gosse, 2010). For example, in the aforementioned Lerner and Simmons (1966) study, when participants were given the opportunity to choose between continuing a procedure that involved shocking a fellow participant in a learning study and switching to a variation that would involve rewards for correct performance, 23 of 25 participants chose to switch to reward. In so doing, they not only chose to end the victim's suffering, but chose the option that compensated her as well.

This work highlights the importance of the justice motive for prosocial behavior. People can be highly motivated to respond to the needs of others, with the important additional insight from justice motive theory that this strategy will be most preferred when people also believe that their actions will adequately remove the injustice (Simmons & Lerner, 1968; White, MacDonnell, & Ellard, 2012).

In principle, taking action could also mean seeing the perpetrator(s) of injustice get their "just deserts." Yet there has been relatively little research explicitly examining the role of the justice motive, as understood here, in reactions to harm-doers. This is remarkable given recent interest in the psychology of retribution. Work by Kevin Carlsmith, John Darely, and their colleagues has highlighted the extent to which variables commonly used to manipulate just world threat (e.g., perpetrator intent, severity of harm) also increase the "moral outrage" of observers and retributive responses animated by a desire for "just deserts" (Carlsmith, 2006; Carlsmith & Darley, 2008; Darley, Carlsmith, & Robinson, 2000). It seems reasonable to wonder if the motive for justice deserts is ultimately based in the justice motive with retributive action focused on bringing offenders in line with expectations for how people should behave and orient to others in a just world.

Recent justice motive investigations indicate that this take on the psychology of retribution has merit (Callan, Dawtry, & Olson, 2012; Callan, Powell, & Ellard, 2007; Hafer, 2000b). An important contribution was made by Hafer (2000b) who found that unpunished perpetrators are more just world threatening than punished ones. More recent investigations have documented how evaluative characteristics of victims (e.g., old/young, attractive/unattractive) moderate judgments of perpetrator punishment culpability. For example, Callan et al. (2007) found that participants recommended more punishment for a harm-doer when the victim was perceived as more attractive than unattractive, and this effect was mediated by the perceived unfairness of the incident. Research by Meindl and Lerner (1983, Study 3) suggests a possible research strategy for generating behavioral evidence of the justice motive in retribution. In their investigation of the heroic motive, they replaced the opportunity to confront someone who had insulted a partner with an unrelated opportunity to engage in an altruistic act. They found that the conditions that created the most willingness to confront the insulter in previous studies also produced the most willingness to be altruistic in an unrelated context when dealing with the insulter was not an option. This finding strengthened the researcher's claim that it was the symbolic significance of the initial harm that motivated their participants' willingness to confront as opposed to say, seizing an opportunity to behave aggressively.

7.3.3 Reacting to Injustice: Non-rational Strategies

Lerner (1980) also proposed several "non-rational" strategies people may employ, particularly when taking action to fully redress injustice is not an option. As a recent review demonstrates, the most extensively investigated of these is victim blame and derogation (Hafer & Bègue, 2005). Devaluing victims or blaming them is just world protective because it has the effect of removing the injustice. If bad things happen to bad people or to people who have done things to deserve their fate, the world is a just place after all. As Hafer

and Bègue note, the emphasis on these two strategies has resulted in a general perception that these two phenomena define the domain of justice motive theory (p. 148). In a sense this is not surprising. Everyone knows that reasonable people do not blame or derogate innocent victims (cf. Weiner, 1985). Lerner's early investigations demonstrating that people do at times respond to victims this way drew the sort of attention strongly counter intuitive findings always do in social psychology (Ross & Nisbett, 1991). However, interest in this research was also undoubtedly fueled by its obvious relevance for understanding some of the intractability of important social justice issues (cf. Ryan, 1971). This is evidenced in the Hafer and Bègue (2005) review where they point out much of the justice motive research since the 1980s has been less about theory development than applying justice motive theory to understanding the challenges faced by various victim populations (e.g., poverty, crime, disease).

More theoretically oriented research clarified important issues in connection with blame and derogation. Early research focused on the role of empathy, with some investigators arguing that empathic experience of a victim's plight should preempt the tendency to blame or derogate (Aderman, Brehm, & Katz, 1974). Addressing this issue yielded an important insight: blame and derogation of victims, if based in the justice motive, *requires some degree of* empathic involvement. The hunch that empathy would preclude such reactions was based on failure to distinguish empathy from sympathy (Lerner & Miller, 1978; Lerner, 1980). Achieving some precision in knowing when observers would blame or derogate or both also emerged out of studies varying factors such as the attractiveness of the victim and plausibility for culpable blame (Lerner & Miller, 1978). For instance, blaming victims increases as a function of the victim's attractiveness precisely because devaluing an attractive person requires more reality distortion.

Remarkably, two other non-rational strategies proposed by Lerner (1980) have received much less empirical attention. In the case of *denial-withdrawal*, the lack of research is unfortunate because it may in fact be one of the most

effective strategies, in part, as Lerner notes, because it doesn't require distortion of reality. The idea is simple: people retain their belief in a just world by ignoring evidence to the contrary. In one of the few empirical demonstrations of this, Pancer (1988) investigated the physical distance participants maintained from a table displaying an appeal for donations to needy children. He found that when the table exhibited a high salience plea for help (e.g., with graphic images of suffering children), people walked further away when passing the table than when it exhibited a low salience, non-graphic appeal. By ignoring and/or avoiding an injustice, people with high just world beliefs were less likely to remember details from the high (vs. low) salient appeal, and as a result, prevented themselves from being exposed to threats to their belief in a just world.

The lack of justice motive research examining denial and withdrawal is unfortunate because its relevance for social justice may be at least as important as blaming or derogating victims. For instance, Lerner's (1980) description of this strategy includes the observation that one way people may avoid the moral outrage of the injustices of poverty is to simply not go there. Don't physically go to "that part of town" and change the channel when "it" appears on your television. Lott's (2002) examination of the role of behavioral distancing from the poor highlights just how significant denial and withdrawal can be as barriers to social justice.

The notion that just world threat can be diminished by *reinterpreting the outcome* has been even less extensively investigated until recently. Kay and Jost (2003) pursued this idea by suggesting that rather than literally reinterpreting the outcome (e.g., poverty is good), people may instead find offsetting compensations for bad outcomes. In the context of poverty, they found that accounts conveying the idea of the poor being happier than the rich were less justice motive threatening than accounts suggesting the rich being happier than the poor.

Interest in non-rational strategies for being able to experience the world as just has begun to examine perceptions of perpetrators. For instance,

the justice motive has been implicated in the tendency to see particular perpetrators as evil (demonizing; Ellard, Miller, Baumle, & Olson, 2002). This research found that particularly egregious forms of suffering inflicted on others (e.g., gratuitous excess in harming combined with sadistic pleasure) appear to evoke such a strong sense of malevolent threat to just world that people need to attribute the behavior to the uniquely deviant (evil) character of the perpetrator. To do otherwise would leave open the door to the possibility that malevolent just world threatening forces exist that can lead potentially anyone to engage in evil acts.

Process Considerations

An important challenge for justice motive researchers that follows naturally from documenting a variety of substitutable ways in which people maintain their belief in a just world is understanding which of one or more strategies may be preferred in any given situation. Carolyn Hafer and her colleagues have taken up the challenge theoretically (Hafer & Gosse, 2010) and empirically (e.g., Hafer & Gosse, 2011; see also Haynes & Olson, 2006). Their theoretical analysis suggests that the strategy or strategies evidenced in a given context will potentially reflect the influence of both situational and person factors. They note, for instance, that situational considerations of effortfulness, availability, and efficacy will guide preference. While empirical work exploring these dimensions is limited, recent research has highlighted the importance of efficacy. White et al. (2012) found that highlighting injustice associated with the production of certain products will only lead to consumer preference for fair trade products, if the consumer believes that their purchase will meaningfully redress the injustice. With respect to individual difference factors, Hafer and Gosse (2011) found that repressors, because of a dispositional desire to avoid negativity, prefer responses to victimization that emphasize compensatory benefits to the victim, whereas non-repressors were more inclined to react negatively to the victim. More recently, Harvey and Callan (2014) examined individual endorsement of religiosity as a significant moderator of immanent justice judgments,

as many religious texts promote concepts that parallel notions of immanent justice. Supporting their predictions, Harvey and Callan (2014) found that highly religious individuals were more likely to make immanent justice attributions when knowledgeable of a victim's prior misdeeds (vs. not). That is, religiosity essentially amplified the use of immanent justice reasoning in response to a misfortune.

As Hafer and Gosse (2010) point out, continuing research in this area is important for both theoretical and practical reasons. The practical significance is demonstrated in the consumer research by White et al. (2012), where deliberate efforts at getting people to address injustice through their consumer choices were found to backfire if the "channel factors" inhibiting and facilitating different strategies were not appropriately addressed.

Another important consideration concerning the processes involved in the implementation of non-rational strategies is the extent to which their appearance relies on or is independent of the capacity to deliberate (or not). While both theory and research have emphasized the implicit and intuitive activation of both rational and non-rational strategies, van den Bos and Maas (2009) produced evidence that seemed to suggest that in the case of victim blaming, observers need to have cognitive capacity to process relevant information. Subsequent examination of this issue strongly suggests that a variety of strategies (helping, derogating, or victim blaming) are possible reactions to injustice whether the observer has cognitive capacity or not (Harvey, Callan, & Matthews, in press).

Taken together, the scholarship concerned with documenting the various ways people react to or avoid injustice in the service of maintaining the belief in a just world is compelling as far as it goes. The extensive emphasis on victim blame and derogation has arguably been at the expense of understanding more completely when and how people adopt other strategies. While these gaps remain, justice motive research has in some ways moved from examining *reactions to injustice* to exploring how the justice motive appears in other ways in people's lives, a trend that is discussed in the next section.

7.4   The New Look of Justice Motive Research: Just World Construal of Everyday Experience

The opening quote to this chapter highlights Lerner's view that being able to believe in a just world is an important basis for meaning in people's lives. Recent developments in justice motive theory and research demonstrate that finding meaning this way is not limited to how we react to injustice, but is also apparent in our ongoing construal of daily experience. The idea that the world is a just place is apparent, for instance, in how people construe causality, remember the past, and think about the future. This important dimension of justice motivation was anticipated in Lerner's (1980) discussion of *protective strategies*; anticipatory and ongoing ways of orienting to one's day-to-day experience that allow us to maintain the belief that "the world is basically a just place" (Rubin & Peplau, 1975). The distinction between reactive and ongoing/anticipatory mechanisms is in some ways arbitrary, but is highlighted here to emphasize the extent to which the justice motive literature has moved beyond documenting a narrow set of responses to victimization.

7.4.1   Anticipating Injustice: The Protective Strategies

Ultimate Justice

Lerner described two protective strategies that minimize the potential for people to have to experience and make sense of injustice in their lives. The first of these, *ultimate justice reasoning*, involves adopting a temporal framework that places present injustice in an extended ultimate justice temporal framework. Encounters with injustice are less problematic and threatening if one is committed to the view that justice is being done or will be done. Notions such as karma and afterlife beliefs that emphasize ultimate rewards for victims and punishment for harm-doers are examples of temporal deservingness framings (see Shweder & Miller, 1985). Ultimate justice

framing is a particularly powerful way of maintaining the just world belief for a few reasons. First, it minimizes the need to distort reality in the present (the victim really is suffering and is not blameworthy or bad). Second, because the future and past are more mutable with respect to generating imagined compensations (rewards and/or punishments), in principle virtually any ongoing injustice can be nullified as a threat to the idea that people get what they deserve.

Recent research has documented the usefulness of having an extended time frame for anticipating the experience of injustice (Anderson, Kay, & Fitzsimons, 2010; Hafer & Gosse, 2011; Warner, VanDeursen, & Pope, 2012). Warner et al. (2012) found that their participants were less likely to blame victims and more likely to find compensatory benefits for suffering if the victimization was temporally distant, whereas the opposite was true if the victimization was temporally proximal. Work by Anderson et al. (2010) is particularly interesting because it is one of the few studies that documents a link between just world threat and the search for meaning; in this case through ultimate justice reasoning. These investigators found that participants whose need to believe in a just world was temporarily heightened subsequently deemed a teenager's later life as more fulfilling and meaningful if he had been badly injured and placed in a wheelchair than if he had suffered only a mild injury, whereas non-justice-threatened participants saw no difference between the two fates in terms of future meaning.

Multiple Worlds, Only One, Mine, Is Just

The non-rational reactive strategy of denial-withdrawal can be extended to being anticipatory and protective if people organize their assumptions and everyday experience around the idea that while there are undoubtedly victims in the world, they occupy a different psychological and physical space than one's own "just world." As Lerner (1980) points out, while we may well be peripherally aware of other victim "worlds," if the victims are out of sight and out of mind, it is easier to indulge the idea that the world is a just

place. The efficacy of this strategy thus depends on being able to successfully construct one's life around a kind of structured selective exposure and psychological distancing. While there is little empirical evidence directly addressing the protective value of "constructing" a just world, there is evidence that people are moved to psychological distance from victims (e.g., Drout & Gaertner, 1994; Hafer, 2000a), such as perceiving oneself as dissimilar to an innocent victim in terms of personal attributes.

Research relevant to the multiple worlds strategy can also be found in the body of work documenting how responsiveness to injustice depends greatly on who it is happening to. In general, the more stigmatized and culturally devalued someone is, the less likely it is that her or his suffering will provoke justice concerns or the sense that a tragedy has happened. Building on early work showing that people were more moved to blame a respectable innocent victim than a similarly innocent but more disreputable one (Jones & Aronson, 1973), researchers have examined a variety of different dimensions that people can be differentially evaluated on. This work has in many instances provided new insight into how important the justice motive is for prejudice and discrimination.

In search of evidence of justice motive processes in these situations, Correia, Vala, and Aguiar (2007) found that while the innocent suffering of an ingroup victim produced justice motive threat, as evidenced by attentional interference to justice words during a modified Stroop task, an equally innocent and suffering outgroup victim did not. Similarly, Callan et al. (2007) found that the death of an attractive young woman was viewed as more unfair and tragic than the death of an identically described woman whose picture was manipulated to be less attractive. Conceptually analogous research produced similar results when the victims varied in age (Callan et al., 2012). Consistent with negative stereotypes about the elderly, a pedestrian accident involving an older person was viewed as less unjust than the same accident happening to a younger person. While on its face it seems unsurprising to find people less concerned about the outcomes of

people they do not like, the important contribution of these studies has been to demonstrate that it is the criterion of deserving that mediates our reactions to the misfortune of others.

7.4.2 Just World Construal of Everyday Experience

A growing body of justice motive research is documenting the various ways in which the need to believe in a just world influences our day-to-day construal of experience. The need is apparent in what we pay attention to, how we process information, and what we remember; in other words, in all phases of the cognitive processes that combine to produce construal of the world as just.

The "online" influence of the justice motive has been recently documented in research examining how visual information search would appear to literally reflect a search for justice. Callan, Ferguson, and Bindemann (2013) found that their participants' search of a visual scene containing good and bad outcomes was influenced by knowing whether or not the actor in the scene was a morally good or bad person. Remarkably, eye gaze preference favored focus on bad outcomes for bad actors and good outcomes for good actors even before the participants learned the actual outcomes in unfolding narratives, or as the authors put it, an anticipatory preference for the *deserved* outcome.

The justice motive has also been shown to influence how we process information. Gaucher, Hafer, Kay, and Davidenko (2010, Study 1) demonstrated that people invoke automatic compensatory cognitions in response to daily experiences of unfairness. Thus, when asked to report their satisfaction with a pending negative experience, participants were more satisfied if they had just recalled a bad break than if they had recalled a recent good break. Similarly, a potential negative turn in the weather was considered more unfortunate after recalling a good break than a bad one. The authors describe this tendency to adjust one's evaluation of ongoing

experience in deservingness terms, compensatory bias.

Just-world construal is also apparent in how people recall the past. A deservingness bias in how people recall events suggests that people use a just-world schema to guide recall (Callan, Kay, Davidenko, & Ellard, 2009; McDonald & Hirt, 1997). In their examination of recall bias, Callan, Kay, et al. (2009) presented participants with a story about a lottery winner and later asked participants to remember the value of the lottery prize during a surprise recall task. Participants recalled a *smaller* lottery prize when the recipient was portrayed as a "bad" person than when he was portrayed as a "good" person. Callan et al. argued that knowledge that a "bad" person received a good outcome was inconsistent with the deservingness expectation that good things should happen only to good people, and therefore participants recalled the lottery prize in a way that rendered its value as more consistent with what a bad person deserves (i.e., less of a good outcome).

A particularly important line of research evidencing just-world construal indicates that deservingness can also inform how people think about causal relationships. This work examining *immanent justice reasoning* has found that the just-world moral imperative can give rise to causal understandings, revealing that people not only need to believe in a just world, but they are also willing to believe that there are causal forces at work to keep it that way.

Immanent justice reasoning was first described by Piaget (1932/1965) as a form of reasoning most evidenced in children at an age when their capacity to distinguish moral forces from natural causal ones is incomplete. Children, for instance, would reason that a child experiencing a fortuitous mishap had the experience because of a prior moral indiscretion. However, it appears that the justice motive can lead adults to engage in similar "magical" reasoning, particularly under conditions where circumstances are morally significant and their capacity for reflective consideration of what happened is diminished (Callan, Ellard, & Nicol, 2006; Callan, Sutton, & Dovale, 2010; for a review, see

Callan, Sutton, Harvey, & Dawtry, 2014). For example, Callan, Harvey et al. (2013) found that participants causally related a freak car accident to the victim's prior behavior to a greater extent when they learned he previously stole from children (vs. did not). Immanent justice reasoning presumably allows an observer to make sense of a misfortune by locating its *cause* in the prior misdeeds of the victim. This cognitive adjustment therefore allows the string of observed events to remain in accordance with just-world principles of deservingness (i.e., "bad things are caused by bad people").

There are resemblances in the "new look" justice motive research to the more extensive body of research documenting all of what goes into people's functional illusions about themselves (Greenwald, 1980; Taylor, 1989; Taylor & Brown, 1988). That extensive scholarship has shown the important role encoding, processing, and recall biases play in allowing us to sustain a coherent positive view of self. A more complete understanding of the psychological underpinnings of the just world functional illusion will similarly benefit from documenting how our cognitive, affective, and motivational architecture combine to provide the sense of coherence and meaning the belief in a just world provides.

7.5 The Justice Motive Influences How We Experience Our Own Fates

In their review of the justice motive literature published after 1980, Hafer and Bègue (2005) note that the experimental justice motive literature had sustained the pre-1980 emphasis on third party reactions to injustice. The pattern has persisted, but researchers have begun to focus attention on how deservingness informs people's reactions to their own outcomes.[2] Lerner (1980) is clear that there is no theoretical reason to

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[2]As Hafer and Bègue (2005) also point out, this stands in contrast to the sizeable literature on the role of just world beliefs and reactions to outcomes (e.g., Dalbert, 2001.)

assume that the justice motive is any less at play for self than others and provides examples of how even the blame and derogation strategies may be applied to the self. A particularly powerful example cited is a study of prospective draftees in a 1971 US military draft lottery (Rubin & Peplau, 1973). Notwithstanding the explicit randomness of the outcome, prospective draftees drawing a lottery number that meant they were unlikely to be drafted evidenced a self-esteem increase from immediately prior to immediately following the lottery, whereas those drawing a number that meant they were very likely to be drafted showed the opposite pattern. The justice motive interpretation of these self-esteem changes once again emphasizes the importance of deservingness. For instance, finding out that a fortuitous process had suddenly increased one's likelihood of joining combat in Vietnam, these young men's views of themselves shifted as deservingness would dictate: they are now the sort of less worthy people who deserve such a fate. More recently, Callan et al. (in press) extended these findings by showing that participants who recalled or experienced random bad (vs. good) outcomes devalued their self-esteem that in turn increased their beliefs about deserving bad outcomes. Moreover, across a series of studies, beliefs about deserving bad outcomes predicted a range of self-defeating beliefs and behaviors, such as self-handicapping, thoughts of self-harm, and wanting others to evaluate the self less positively. These findings provided evidence for the idea that one reason why people lower in self-esteem engage in self-defeating behaviors is because they believe they *deserve* bad outcomes.

These findings with fortuitous outcomes align with social justice research examining the role just-world beliefs play in the tendency for people to resist perceptions of personal discrimination and be remarkably accepting of their unjust lot in life (Hafer & Choma, 2009; Olson & Hafer, 2001). However, self-deprecation and blame are not the only expressions of the justice motive for the deprived. Callan, Ellard, Shead, and Hodgins (2008; see also Callan, Shead, & Olson, 2011) document how personal relative deprivation can

give rise to a willingness to use gambling as mechanism for finding justice in their lives, a behavioral strategy that too often only makes things worse.

People appear to be willing to re-evaluate themselves as a function of outcome when the outcome is positive. Ellard and Bates (1990) created a simulated work situation in which participants thought they had been randomly assigned to be either the "supervisor" or a fellow "worker." As with the Rubin and Peplau (1973) study, even though participants knew their status as supervisor or worker was arrived at through an ostensible random process, those occupying a "supervisor" role had no difficulty seeing themselves as superior in character to the "worker," as one would expect if participants needed to see themselves as deserving of their status position. More recent work shows how memory processes can enable a self-blame rather than self-derogation in the service of deservingness construal. Callan, Kay et al. (2009, Study 3) showed that people are selectively biased in how they view themselves following a bad break. After failing to gain (vs. successfully gaining) the chance to take part in a unique and rewarding study, participants recalled more previous bad deeds to justify their fortuitous bad break.

The need to believe that one's outcomes are deserved can also give rise to anticipatory strategies that appear to draw on the same immanent justice assumptions about how justice guides the course of events in one's life. Converse, Risen, and Carter (2012) and Zuckerman (1975) both showed that when people are anticipating an important outcome, such as an impending exam or job offer, they engage in behaviors that would increase their deservingness of the desired outcome. For example, Converse et al. (2012) found that participants acted more virtuously (e.g., donated money) ahead of an uncertain but desired outcome (e.g., a job offer) presumably as a means of encouraging the favor of fate: good things happen to people who do good things. It therefore seems that when people anticipate a positive outcome, which is held in the hands of fate, they will actively try to make themselves more deserving

of the desired outcome. Believing that the world operates in a fair and just way, where good things happen to good people and bad things happen to bad people, motivates people to enhance their value and worth in the hope that they will be justly rewarded.[3]

7.6 Issues and Directions for Future Research

While justice motive research has continued to develop, challenges remain. Of particular importance is the need for more theory and research clarifying the relation between the justice motive and just world beliefs. As Hafer and Bègue (2005) noted, just world research has tended to pursue one of two strategies. An individual difference-oriented strategy that assumes a high degree of correspondence between standing on self-report measures of just world beliefs and strength of the justice motive has examined various theoretical and applied questions using largely correlational research designs (cf. Dalbert, 2001). The second approach relies more on experimental manipulations, typically of just world threat, and assesses reactions on a variety of dependent measures including evaluations of victims, perpetrators, and outcomes. More recently, this approach has included more "process" type measures of attention, memory, and causal inference. This approach emphasizes the construct validity of the manipulations used rather than making strong assumptions about the construct validity of self-report just world belief measures.

Over time, the two approaches have given rise to two "just world" literatures that have become increasingly disconnected from one another, as evidenced by two separate chapters in this handbook. The trend is unfortunate for both theoreti-

cal and practical reasons. Theoretically, the divergence arises in part because of different assumptions about the nature of the justice motive. The just world belief scholarship conceptualizes the motive in terms of individual differences in justice striving and the *strength* of the belief. The experimental justice motive literature, on the other hand, relies on a homeostatic, prevention understanding of the motive that has as its ultimate goal sustaining the assumption that the world is just (see above). This conceptualization does not preclude justice striving, but would predict such striving to reflect a need to redress a significant threat to the just world assumption. To the extent that the striving succeeds in diminishing the impact of threat, the striving would be expected to diminish. This conceptualization of the motive results in a more skeptical stance with respect to just world belief measures because it assumes that most, if not all, people have the same strong need to be able to assume the world is just. Individual differences in just world beliefs then are assumed to be less about the strength of the belief, than perhaps stylistic differences in how it is maintained (cf. Lerner, 1980, Chap. 10). Given the importance of these issues, there is a significant need for experimental and psychometric research clarifying the relation between the conceptualization of the justice motive developed here and just-world beliefs (see Hafer & Bègue, 2005 for an analysis of early empirical efforts at addressing this issue and Hafer & Sutton, 2016, Chap. 8 of this handbook).

The practical implications of two just world literatures are equally important, particularly when scholars outside the area are interested in drawing on just world theory for their area of inquiry. Literature searches on just world will turn up as many or more studies using just world belief measures to study the justice motive than experimental ones. This combined with the relative ease of using readily available just world self-report measures can potentially lead to research with interpretations of findings that may or may not accurately reflect justice motive processes.

Another matter that persists in the justice motive literature has to do with nature of the stimuli used in just world studies and the related

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[3] These findings shed light on a counterintuitive pattern of behavior Irving Janis (1951) observed in his study of how people in Europe dealt with the randomness of bombing raids during World War II. He expected than when faced with the prospect of losing one's life in an instant people would become more hedonistic. He found the opposite. Under such threat conditions, people adhered more, not less, to norms of good conduct.

issue of independent variable construct validity. Lerner has argued strongly for studies that use sufficiently engaging and involving stimulus situations to allow the researcher to have confidence that the stimuli are sufficiently impactful and that inferences about activation of the motive are plausible (Lerner, 2003). The difficulty of course is that there is no established practice for knowing whether one's stimuli are engaging enough. It is not sufficient to assess self-report measures of emotionality because the absence of emotional reaction following stimulus presentation of an injustice may itself be indirect evidence of the success of a just world restoring process (e.g., "he deserved what happened to him, so need to be upset about it"). The theoretical implications of this problem are significant. As Lerner (2003) points out, research participant reactions under conditions of reflective disengagement are difficult to interpret because of the difficulty of distinguishing the influence of norms (e.g., fairness, self-interest, self-presentation) in participant reactions from justice motivated responses. As a result, research designed to delineate and document strategies for ensuring activation of the justice motive is called for. If the outcome of such efforts is more standardization and calibration of the influence of the motive, it will also make the resulting body of research more tractable for meta-analytic reviews.

The opening quote for this chapter highlights Melvin Lerner's conviction that the justice motive is a more central and foundational component of people's general sense of purpose and meaning than has been recognized. While significant strides have been made in our understanding and appreciation of the *pervasiveness* of the justice motive in everyday life, the literature has matured to the point where the full reach of the theory captured in Lerner's quote may begin to capture researchers' interest. For that, researchers will likely need to engage in more field research with populations struggling with meaning in their lives, for instance, when basic assumptions are "shattered" in the aftermath of a major life event (cf. Janoff-Bulman, 1992). The question "why me?" is both commonplace in such situations and possibly the most compelling evidence of how

deservingness is central to making sense of experiences that are powerful enough to lay bare the assumptions that sustain our day-to-day goal striving and sense of purpose. Justice motive research of this sort would also provide points of contact with the just world belief literature, which has already examined correlates of just world beliefs in a variety of real-world contexts.

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Belief in a Just World

8

Carolyn L. Hafer and Robbie Sutton

8.1 Introduction

Lerner's (1977) justice motive theory is one of the most influential justice theories in social psychology. Testifying to its impact, the theory has spawned two very different lines of research: One focused on experimental tests of motivational processes; and another, largely correlational, line of research emphasizing stable individual differences. Ellard, Harvey, and Callan (2016) provide a detailed review of the former, experimental literature. In this chapter, we review past and current developments in the individual difference literature.

Based on a series of experiments, Lerner (1980) proposed that people need to believe that the world is a just place wherein individuals get what they deserve. Instances of undeserved outcomes (i.e., injustice) are therefore threatening. People respond to such threats by trying to restore justice, often through defensive means. For example, people might defensively derogate the character of victims of misfortune and lionize the character of undeserving beneficiaries of good fortune. In either case, assessment of the indi-

vidual's character is adjusted, so the individual's fate seems more deserved and, therefore, just (see Ellard, Harvey, & Callan, 2016, Chap. 7 of this handbook, for a sustained discussion of the motive to perceive the world as a just place).

Rubin and Peplau (1973) proposed that only individuals who have a strong dispositional belief in a just world (BJW) would react as predicted by justice motive theory. In doing so, Rubin and Peplau (1973) assumed a close correspondence between the strength of (a) the BJW and (b) the desire to believe in a just world. Informed by this assumption, Rubin and Peplau (1973, 1975) developed the Just World Scale, which measures people's chronic belief that the world is a just place in which individuals get what they deserve. Importantly, the Just World Scale, like other BJW scales, does not explicitly assess the need to believe in a just world. Further, as we shall see later in this chapter, it is unlikely that anything more than a very weak relation exists between scores on BJW scales and the need to believe in a just world. Thus, Rubin and Peplau's starting assumption now seems misguided. Nonetheless, their research was the first to explore the properties of BJW as an individual difference variable, and in doing so made possible all the discoveries that have subsequently arisen from studies of BJW.

Since Rubin and Peplau's (1973, 1975) seminal papers, the research has matured such that BJW

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is often examined as an important individual difference construct in its own right, and not solely as a potential moderator of experimental effects predicted by justice motive theory. This research can be characterized by three broad trends: further development of BJW scales, studies of correlates of BJW, and research addressing the broader significance of BJW. We organize our chapter according to these three themes.

8.2   Scale Development

8.2.1   Rubin and Peplau's Just World Scale

The Just World Scale is an explicit self-report measure consisting of a series of statements to which people indicate the extent of their agreement-disagreement on a numeric scale. An initial 16-item version of the scale was followed by a 20-item version (see Rubin & Peplau, 1975). Several items in the Just World Scale address a specific domain, such as the legal system and health, whereas other items are general (e.g., "Basically, the world is a just place"). Some items are phrased in the unjust world direction and are, thus, reverse-scored (e.g., "I've found that a person rarely deserves the reputation he has").

To validate the 16-item scale, Rubin and Peplau (1973) administered the measure to young men who were subject to the 1971 military draft lottery in the United States. Men scoring higher on the Just World Scale, compared to those scoring lower, had a greater tendency to react more favorably to "winners" of the lottery (those whose randomly drawn number meant they were less likely to be drafted into military service) than to "losers" (those whose number meant they were more likely to be drafted). The findings were consistent with Rubin and Peplau's (1973) claim that individuals who hold a strong BJW are more likely to respond to undeserved outcomes as hypothesized in justice motive theory; that is, by derogating victims of undeserved negative outcomes and lionizing beneficiaries of undeserved positive outcomes.

Rubin and Peplau (1975) summarized early evidence of the reliability and validity of the Just World

Scale. For example, regarding construct validity, Rubin and Peplau reported further evidence that individuals with a strong BJW derogate victims relative to individuals with a weaker BJW. In addition, Rubin and Peplau summarized correlates of BJW (e.g., authoritarianism) that are expected on the basis of theory about the development and functions of the belief. Finally, Rubin and Peplau presented correlational evidence of predicted sociopolitical "consequences" of BJW, such as positive attitudes toward existing political and social institutions, negative attitudes toward disadvantaged groups, and lower levels of social activism.

8.2.2   Criticisms of Rubin and Peplau's Just World Scale

Despite preliminary evidence of acceptable reliability and validity for the Just World Scale, researchers soon began to discover weaknesses (for reviews, see Furnham & Procter, 1989; Furnham, 2003). First, although most initial internal consistency coefficients were adequate, later studies yielded poorer results (e.g., Ambrosio & Sheehan, 1990; Hellman, Muilenburg-Trevino, & Worley, 2008; Loo, 2002a). Second, the factor structure of the Just World Scale was also criticized. Although the scale is presumably meant to be unidimensional, many studies showed evidence for several interpretable factors. Furthermore, the factor structure is not consistent across studies (Furnham, 2003).

A third problem for the Just World Scale is that the meaning of its reverse-coded items is ambiguous. Several authors have found that items worded in the just-world vs. unjust-world direction load onto different factors. In addition, separate just-world and unjust-world scales created from these differentially keyed items are only weakly correlated (if at all) and typically predict different criteria (e.g., Couch, 1998; Dalbert, Lipkus, Sallay, & Goch, 2001; Furnham, 1995; Loo, 2002a). These findings imply that the opposite of BJW is not necessarily belief in an unjust world. Furnham and Procter (1989) suggested that another alternative to a BJW is a belief that the world is random and,

therefore, not predicable at all. In contrast, an unjust world is a nonrandom world in which people predictably receive undeserved outcomes. Thus, unjust world items are likely inadequate as indicators of (low) BJW.

8.2.3 Attempts to Improve the Just World Scale

Since Rubin and Peplau's groundbreaking work, the development of BJW scales has taken different directions. First, researchers have created more psychometrically sound measures of general BJW. Second, researchers have gone beyond the idea of general BJW to create scales assessing BJW in different domains of life. Third, some researchers have attempted to assess different ways of believing in a just world.

General BJW scales. Rubin and Peplau's scale includes both domain-specific and general items. Two subsequent measures of BJW—a 6-item German scale by Dalbert, Montada, and Schmitt (1987), and a 7-item English scale by Lipkus (1991)—include only general items. These scales address many of the criticisms of the Just World Scale. Likely due to the use of only general items, the newer scales show increased reliability compared to the Just World Scale, as well as unidimensionality (see Dalbert, 1999; Lipkus, 1991, though see O'Connor et al., 1996). Cronbach's alpha is often between .60 and .70 for the Dalbert scale (e.g., Dalbert, 1999; Dalbert & Yamauchi, 1994; Loo, 2002b), and above .80 for the Lipkus scale (e.g., Hafer, 2000; Lipkus, 1991; O'Connor et al., 1996). Also, items for both scales are keyed in the just-world direction, thus avoiding problems associated with some items indicating an unjust world. Scores on both the Dalbert and Lipkus scales correlate with criteria based on past research with the Just World Scale and on theorizing about the functions of BJW (e.g., Lipkus, 1991; Montada, 1998). Overall, the psychometric properties of both newer scales exceed those of the Rubin and Peplau measure.

Although the Just World Scale remains the most widely used measure of individual differ-

ences in BJW, the Dalbert and Lipkus measures are gaining popularity. Indeed, the Dalbert measure has been translated into several different languages (e.g., Bastounis, Leiser, & Roland-Lévy, 2004; Bastounis & Minibas-Poussard, 2012; Dalbert & Katona-Sallay, 1996; Dalbert & Yamauchi, 1994).

BJW in different domains. Some researchers have argued that BJW might vary within individuals depending on the domain specified. Furnham and Procter (1992) created the Multidimensional BJW Scale, which taps into just world and unjust world beliefs in three spheres of life: sociopolitical, interpersonal, and personal domains. Unfortunately, the scales suffer from poor psychometric properties (e.g., Furnham & Procter, 1992; Lipkus, 1991) and thus have not been widely used.

More promising, Lucas and colleagues have created measures of distributive and procedural BJW (e.g., Lucas, Alexander, Firestone, & LeBreton, 2007). Distributive justice is the justice of distributions of resources or outcomes (e.g., Deutsch, 1985). Procedural justice is the justice of mechanisms for making decisions about distributions or outcomes, as well as the treatment of those affected by decisions (e.g., Bies & Moag, 1986; Lind & Tyler, 1988). Lucas's research is still in its early stages, but initial reliability and validity for his scales are good. Interestingly, Lucas, Zhdanova, and Alexander (2011) recently crossed procedural vs. distributive BJW with BJW for self vs. others (the latter distinction is described next) to yield four domains of BJW, each of which might have different consequences.

BJW for self vs. people generally: A more long-standing approach to assessing BJW in different domains is to distinguish a belief that one's own world is just from a belief that the world is just for people generally. According to justice motive theory, the ultimate reason to believe that the world is just for people generally is that, if the world is "just for others," it is also likely "just for me." Thus, the two domains of BJW, though separable, should be related. In addition, given the more important goal of perceiving one's own

world to be just, a personal BJW should be stronger than a more general BJW.

The distinction between personal and general has been operationalized in two ways. Lipkus, Dalbert, and Siegler (1996) distinguished the BJW for the self from the BJW for others. Each domain is assessed with eight items. Items for BJW-self and BJW-others differ only in the use of pronouns (e.g., "I feel that the world treats me fairly" vs. "I feel that the world treats others fairly"). In parallel, Dalbert (1999) designed the 6-item Personal BJW Scale as a counterpart to Dalbert's general BJW scale, noted earlier. The personal BJW items are not tightly matched to the general BJW items, as in the Lipkus scales.

Research using the Lipkus and Dalbert scales has produced similar findings (e.g., Bègue & Bastounis, 2003; Dalbert, 1999; Lipkus et al., 1996; Sutton & Douglas, 2005). Consistent with justice motive theory, the personal versions of BJW are positively correlated with their more general counterparts. Also, personal BJW and BJW-self are typically endorsed more strongly than general BJW and BJW-others, respectively; though the relative strength of the personal versions of BJW may be culturally bound (see Wu et al., 2011).

Despite the correlation between personal and general versions of BJW, the two versions have unique correlates. Overall, personal BJW and BJW-self tend to be associated with the theoretical "benefits" of BJW—like subjective well-being—moreso than general BJW and BJW-others (e.g., Bègue & Bastounis, 2003; Lipkus et al., 1996; Sutton et al., 2008; Sutton & Douglas, 2005; Sutton & Winnard, 2007). The more general forms of BJW, especially BJW-others, are associated with traditional "costs" of BJW, including harsh, punitive responses to perpetrators of injustice and harsh responses to the disadvantaged (e.g., Bègue & Bastounis, 2003; Sutton & Douglas, 2005). These findings suggest that BJW-others is more closely linked than BJW-self with defenses typically associated with justice motive theory, such as derogation of victims of injustice. A heightened defensiveness about injustice might explain why BJW-others is positively associated with the desire to ostracise

and seek vengeance against those who have transgressed against the self, whereas BJW-self is positively associated with forgiveness (Lucas et al., 2011; Strelan & Sutton, 2011). Alternatively, these findings could be accounted for by the relation between BJW-others and antisocial tendencies (e.g., Sutton & Winnard, 2007).

Different ways of believing in a just world. Maes (e.g., Maes, 1998b; Maes & Schmitt, 1999) has gone beyond general BJW scales by proposing different *ways* of believing in a just world. These are a belief in ultimate justice—that justice will prevail in the long-run—and a belief in immanent justice—that justice occurs in the present (see Piaget, 1932/1965). Similar to BJW-others, belief in immanent justice is more strongly related to negative responses to victims that are typically studied in the justice motive literature, such as character derogation and blame. Conversely, belief in ultimate justice is more related to prosocial responses to victims, such as positive character evaluations and a willingness to help. Although few researchers outside of Maes's group have employed immanent and ultimate BJW scales (though see Bègue, 2002), the notion of different ways of believing in a just world has promise for further refining the concept of BJW.

8.3   Correlates of BJW

Whereas one research stream has focussed on the development of various BJW scales, an often-related line of research involves the correlates of BJW. The majority of the correlational studies were conducted in the 1970s and 1980s, during what has been called the construct validation phase of research on individual differences in BJW (Maes, 1998a). Relevant literature has been reviewed by several authors (e.g., Furnham, 2003; Furnham & Procter, 1989; Rubin & Peplau, 1975). In the current chapter, we integrate and update these reviews, focusing on the most commonly studied correlates of BJW—reactions to victims and beneficiaries, and ideological variables.

8.3.1 Reactions to Victims and Beneficiaries

Most authors conceptualize BJW not only as a belief that people get what they deserve, but also as a belief that people deserve what they get. Thus, individuals with a strong BJW should react to people's outcomes in ways that reflect a bias toward seeing those outcomes as deserved. Such reactions should occur whether the target is the self or another person, and whether the target's outcomes are negative, as in the case of "victims," or positive, as in the case of "beneficiaries."

The other as victim. A large number of studies have examined relations between BJW and reactions to victimized or disadvantaged others. The most commonly assessed reactions are attributions about the causes of the misfortune and evaluations of the victim. Research generally shows that a stronger BJW is related to blaming victims for their negative outcomes, as well as to negatively evaluating victims (Furnham, 2003; Rubin & Peplau, 1975; for examples of more recent work, see Bizer, Hart, & Jekogian, 2012; Ebneter, Latner, & O'Brien, 2011; Keller & Siegrist, 2010; Sakalli-Uğurlu, Yalçın, & Glick, 2007; Smith, Mao, Perkins, & Ampuero, 2011). Given that blame and negative evaluations help to justify victims' fate as deserved, it is not surprising that researchers have also found an association between BJW and perceived deservingness or fairness of victims' lot (e.g., Appelbaum, Lennon, & Aber, 2006; Dalbert, Fisch, & Montada, 1992; Nudelman & Shiloh, 2011).

Several authors note that relations between BJW and attributional or evaluative reactions to victims are small (e.g., Montada, 1998; Rubin & Peplau, 1975). Research showing that different measures of BJW predict different responses to victims (e.g., BJW-self vs. BJW-others, ultimate vs. immanent BJW) helps account for the modest findings.

The self as victim. Relatively little research has been devoted to BJW and reactions to *one's own* victimized or disadvantaged state. Overall, asso-

ciations between BJW and either self-blame or negative evaluations of the self are less reliable than in the literature on reactions to others (cf. Carels et al., 2009; Dalbert, 1998; Hafer & Correy, 1999; Kielcolt-Glaser & Williams, 1987; Rüsch, Todd, Bodenhausen, & Corrigan, 2010). Ego-defensive motives might reduce the likelihood that victims will interpret their own outcomes in a way that reflects badly on the self (e.g., through self-blame; see Hafer & Gosse, 2010). BJW is more consistently related to perceived fairness of one's negative outcomes, though the association is sometimes moderated by a third variable, such as ambiguity of the situation (cf. Ball, Trevino, & Sims, 1993; Choma, Hafer, Crosby, & Foster, 2012; Hafer & Correy, 1999; Hafer & Olson, 1989; Hagedoorn, Buunk, & Van de Vliert, 2002). Another common dependent variable is affective reactions to one's negative outcomes (e.g., Hafer & Olson, 1989, 1998; Hagedoorn et al., 2002; Kielcolt-Glaser & Williams, 1987). Hafer and Correy (1999), for example, found that students' BJW predicted their emotional reactions to a poor exam grade, mediated by perceived unfairness and attributions.

Beneficiaries. Still less research has examined the relation between BJW and reactions to recipients of positive outcomes. In general, this research shows that a strong BJW is associated with reactions that presumably rationalize a beneficiary's positive fate as deserved. For example, individuals with a strong BJW associate higher status with positive characteristics more than do individuals with a weaker BJW (e.g., Dion & Dion, 1987; Oldmeadow & Fiske, 2007). Similarly, BJW is associated with more positive evaluations of powerful others (e.g., Rubin & Peplau, 1975; Smith, 1985).

We are aware of only one study on BJW and reactions to the self as beneficiary. Ellard and Bates (1990, Study 2) assigned participants a high status role, and an alleged other participant a low status role. Individuals with a strong, but not those with a weak, BJW rated their own character traits more positively compared to the other's traits.

8.3.2 Ideological Variables

Researchers have also frequently examined the relation between BJW and socio-political ideology, especially conservative ideology and religiosity (Furnham, 2003; Furnham & Procter, 1989; Rubin & Peplau, 1975). BJW should correlate positively with these variables given that they share the following content: adulation of high status and denigration of low status others; a focus on order, control, and support for the status quo; and a belief in ultimate justice.

Most reviews of BJW mention associations between BJW and conservative ideology. More recent studies report similar relations, whether conservative ideology is assessed via authoritarianism (e.g., Christopher, Zabel, Jones, & Marek, 2008; Henderson-King, Henderson-King, Bolea, Koches, & Kauffman, 2004; Reser & Muncer, 2004), self-identification as liberal-conservative (e.g., Christopher et al., 2008; Parikh, Post, & Flowers, 2011; but see Choma et al., 2012), or endorsement of traditionally conservative policy opinions and social attitudes (e.g., Bastounis et al., 2004; Bègue & Bastounis, 2003; Lodewijkx, Kersten, & van Zomeren, 2008).

Religiosity is also a relatively consistent correlate of BJW, though there is evidence that the expected positive correlation does not occur for all religious groups (Furnham, 2003; Furnham & Procter, 1989; Rubin & Peplau, 1975). A more consistent quasi-religious correlate of BJW is endorsement of the Protestant Work Ethic (Furnham & Procter, 1989; Rubin & Peplau, 1975). Recent authors (Christopher et al., 2008; Ghorpade, Lackritz, & Singh, 2006) argue that BJW is more strongly associated with specific facets of Protestant Work Ethic beliefs, such as the (nonreligious) belief that hard work leads to good outcomes.

Many researchers have measured locus of control along with socio-political ideology and BJW. Greater internal locus of control and similar constructs (e.g., mastery) are related to a stronger BJW (Bastounis et al., 2004; Choma et al., 2012; Christopher et al., 2008; Furnham & Procter, 1989; Ghorpade et al., 2006; Rubin & Peplau, 1975). A correlation between BJW and internal locus of control is consistent with justice motive theory. Lerner (1977) argues that BJW helps people invest in long-term goals, presumably by providing confidence that their current efforts will eventually pay off as deserved. Thus, BJW should increase the sense that one can influence one's outcomes, as is characteristic of individuals with a strong internal locus of control.

As noted by Dittmar and Dickinson (1993), the ideological correlates of BJW are themselves intercorrelated, and high scores on these variables are characteristic of right-wing ideology. Yet, BJW is conceptually and empirically distinct from its socio-political correlates. Conceptually, many theories of conservative ideology claim that such belief-systems originate in personalities or social climates that promote feelings of threat and uncertainty (e.g., Duckitt, 2001; Jost, 2009). In contrast, proposed sources of BJW include an intrapsychic need related to investment in long-term goals, experience with injustice, and social learning (see section on bases of BJW). Empirically, a distinction is suggested by factor analyses (e.g., Lerner, 1978) and by the many studies in which BJW accounts for unique variance in relevant criteria, over and above ideological correlates (e.g., Appelbaum, 2002; Bègue & Bastounis, 2003, Study 5; Henderson-King et al., 2004; Martin & Cohn, 2004; Ng & Allen, 2005). In addition, BJW might act as a mediator between ideological variables and criterion variables. For example, Schlenker, Chambers, and Le (2012, Study 1) found that the relation between political conservatism and psychological adjustment was mediated by BJW and related perceptions of fairness.

8.3.3 Other Correlates of BJW

A few other noteworthy correlates add to the discriminant validity of BJW. Small correlations between BJW and sensitivity to injustice, as measured by Schmitt and colleagues' justice sensitivity scales (Schmitt, Gollwitzer, Maes, & Arbach, 2005), indicate that these constructs are not equivalent. Similarly, BJW does not seem to

be equivalent to a preference for the equity or merit principle of distributive justice (Davey, Bobocel, Son Hing, & Zanna, 1999; Montada, 1998), although BJW is construed as a belief that the world works according to rules for deservingness (which is often equated with equity or merit).

Finally, BJW shows small correlations with some personality traits (Nudelman, 2013), such as an inverse correlation with the Big Five factor of Neuroticism. Yet, multiple regression analyses show that BJW predicts criteria over and above personality (e.g., Dette, Stöber, & Dalbert, 2004; Keller & Siegrist, 2010; Lipkus et al., 1996). Thus, BJW explains human psychological variation that is not accounted for by broad dimensions of personality.

8.4 The Significance of BJW in People's Lives

The literature reviewed so far has advanced the measurement, validation, and refinement of the construct of BJW. Other studies address (directly or indirectly) the *significance* of BJW in people's lives. Much of this work has been conducted post-1990 and continues to be an important theme in BJW research. We organize the relevant research around three key questions: Is BJW adaptive for the self?, is BJW adaptive for society?, and what are the bases of BJW?

8.4.1 Is BJW Adaptive for the Self?

Psychological well-being. According to justice motive theory, BJW affords psychological benefits by providing people with a sense that their lives are meaningful, predictable, and controllable (see Dalbert, 2001; Lerner, 1980). BJW should thus protect people from negative affect associated with worries about the future and also buffer them from the adverse psychological consequences of negative and undeserved outcomes in their past and present.

The systematic examination of BJW and well-being started in the 1990s, when Dalbert (e.g.,

Dalbert, 1999) conceptualized BJW as a "positive illusion"—in other words, a belief that is psychologically beneficial, yet unwarranted by facts and logic (Taylor & Brown, 1988). Inspired by this conceptualization, researchers have gathered a large body of evidence suggesting that BJW is associated with good psychological adjustment (Dalbert, 2009; Furnham, 2003). As noted earlier, personal BJW appears to be more strongly associated with psychological well-being than general forms of BJW (Dalbert, 2009). Furthermore, the relation between personal forms of BJW and well-being appears both in Western (e.g., Correia & Dalbert, 2007; Sutton & Winnard, 2007) and collectivistic cultures (e.g., Fatima & Suhail, 2010; Kamble & Dalbert, 2012; Xie, Liu, & Gan, 2011). However, for individuals living under very adverse circumstances, general forms of BJW may provide more effective solace than personal forms (e.g., Dalbert, 1998; McParland & Knussen, 2010; Wu et al., 2011; but see Xie et al., 2011).

Physical health. A few studies suggest that at least certain forms of BJW are associated with physical health (e.g., Agrawal & Dalal, 1993; Lucas, Alexander, Firestone, & LeBreton, 2008). There are several potential mechanisms underlying a BJW-health relation. For example, perhaps a strong BJW contributes to physical health because it is associated with adaptive appraisals of stressors, which lower damaging physiological responses to stress (see Tomaka & Blascovich, 1994). BJW might also benefit physical health because it equips people to pursue long-term rewards: Thus, BJW could help people to adopt healthy behaviors and to refrain from behaviors that damage their physical health in the long run (see Lucas et al., 2008). Alternatively, people with a strong BJW might accept that certain diseases are preventable (see Lucas, Alexander, Firestone, & LeBreton, 2009), which would conceivably lead to appropriate action to prevent such diseases.

Studies on BJW and risk suggest that BJW could, for certain people, lead to *more* unhealthy behaviors. Lambert, Burroughs, and Nguyen (1999) found that, among individuals who are particularly vulnerable to perceived threat, a

strong BJW predicted lower perceived risk of becoming a victim of negative events, including disease (e.g., AIDS). By protecting against fear of future illness, BJW could in turn lead to more risky health behaviors (see Hafer, Bogaert, & McMullen, 2001).

Investment in long-term goals and trust. According to Lerner (1977), BJW is adaptive in part because it encourages investment in long-term goals. From an individual difference perspective, individuals who develop a strong BJW believe they will be treated fairly and should feel confident that, as long as they invest the resources deemed necessary to reach long-term goals, they will be rewarded accordingly (Dalbert, 2001; Hafer, 2000). Indeed, researchers have found a positive relation between BJW and perceived likelihood of achieving one's goals (e.g., Dette et al., 2004; Otto & Dalbert, 2005; Sutton & Winnard, 2007). The benefits of BJW for long-term goal pursuit might not apply universally, however. Findings from Laurin, Fitzsimons, and Kay (2011) suggest that BJW encourages investment in long-term goals for members of disadvantaged groups, but not advantaged groups.

If BJW imbues confidence that one will be treated fairly, it is perhaps unsurprising that BJW is associated with indices of trust, including interpersonal and institutional trust (e.g., Bègue, 2002; Correia & Vala, 2004, Study 3; Lipkus, 1991). The high trust among just-world believers can have additional benefits. For example, Lipkus and Bissonnette (1996) found that BJW predicted trust in intimate partners, which in turn was associated with partners' willingness to accommodate to each others' needs, and so to relationship satisfaction.

8.4.2 Is BJW Adaptive for Society?

The implications of BJW for societal-level outcomes are more ambivalent than they are for self-relevant outcomes. As noted in the previous section, BJW is associated with trust, which is a boon to social cooperation. BJW is also linked to psychological health and pursuit of long-term projects, and societies surely function better when they are populated by happier, more productive people. Yet, BJW is associated with harsh attitudes to victims, which can be expected to lead to adverse social outcomes such as heightened disadvantage and inequality.

Pro and antisocial behavior. Another way that BJW may affect societal-level outcomes is via its association with pro and antisocial behavior. Because BJW entails that prosocial and antisocial acts will receive the rewards or punishments they deserve, BJW should be negatively associated with antisocial behavior and positively associated with prosocial behavior.

With regard to antisocial behavior, Hafer (2000) found negative correlations between BJW and the tendency to employ antisocial means to obtain goals (but see Cohn & Modecki, 2007). Studies also show that BJW is inversely related to positive attitudes toward bullying, as well as bullying behavior (e.g., Correia & Dalbert, 2008; Donat, Umlauft, Dalbert, & Kamble, 2012; Fox, Elder, Gater, & Johnson, 2010; but see Almeida, Correia, & Marinho, 2010).

On the downside, BJW may *support* "antisocial" behaviors if those behaviors are construed as just punishment for moral violations perpetrated by others. General BJW appears to be especially important in this regard, predicting support for vengeance against the perpetrators of terrorist attacks (Kaiser, Vick, & Major, 2004). In addition, studies have shown general BJW to be positively associated with self-reported vengefulness against people who have wronged the self, whereas personal BJW is positively associated with forgiveness (Lucas et al., 2011; Strelan & Sutton, 2011). The associations with general BJW are consistent with the previously noted relation between general forms of BJW and harsh, punitive responses to offenders.

As well as antisocial behavior, BJW appears to be relevant to prosocial behavior. For example, studies show a positive association between BJW and donation to charity (Furnham, 1995; Kogut & Ritov, 2011), helping strangers (Bierhoff, Klein, & Kramp, 1991; Zuckerman, 1975), buying ethical products (White, MacDonnell,

& Ellard, 2012), and voluntarily sharing with others in economic games (Dalbert & Umlauft, 2009). As noted in the section on scale development, measures of belief in ultimate justice, as opposed to immanent justice, are more strongly related to prosocial responses to victims, even after controlling for immanent justice. Interestingly, Montada and Schneider (1989) found evidence that BJW might be positively (rather than negatively) related to prosocial behavior once cognitive rationalizations related to BJW are statistically accounted for.

Maintenance of the status quo. On balance, the literature on BJW and pro and antisocial behavior suggests that BJW is adaptive for society. A different perspective (e.g., Jost & Hunyady, 2005; Olson & Hafer, 2001; Sidanius & Pratto, 1999) views BJW as maladaptive because it legitimizes existing societal systems, even systems that work against the best interests of the perceiver (e.g., Jost & Banaji, 1994). There is empirical evidence that BJW is related to perceived fairness or legitimacy of societal systems (e.g., Bastounis et al., 2004; Martin & Cohn, 2004; Ng & Allen, 2005; Rubin & Peplau, 1975; Smith, 1985). BJW likely leads to perceived legitimacy because it biases one to view systems as fair or deserved, often through the kinds of evaluations and attributions described under "Reactions to Victims and Beneficiaries" (see Hafer & Choma, 2009).

One implication of this relation between BJW and the perceived fairness and legitimacy of broad systems is that people with a strong BJW perceive less discrimination (e.g., Birt & Dion, 1987; Choma et al., 2012; Lipkus & Siegler, 1993). Another implication is that BJW predicts less willingness to take action aimed at changing the status quo, because change is presumably viewed as unnecessary (e.g., Beierlein, Werner, Preiser, & Wermuth, 2011; Hafer & Olson, 1993; Parikh et al., 2011; Rubin & Peplau, 1973; but see Lodewijkx et al., 2008). The BJW-action relation is moderated by the perceived efficacy of behaviors aimed at change (e.g., Beierlein et al., 2011; Mohiyeddini & Montada, 1998). For example, White et al.'s (2012) research suggests that BJW predicts *greater* social action when the

action is viewed as efficacious (see also Miller, 1977). These findings are consistent with the justice motive theory claim that people will attempt to maintain a threatened BJW through prosocial action (rather than rationalization) primarily when action is a viable option.

8.4.3 What are the Bases of BJW?

An examination of the significance of BJW in people's lives would be incomplete without discussion of the developmental foundations of BJW. Researchers have suggested several bases of BJW. First, BJW is often assumed to reflect individual differences in the *need* to believe in a just world that is described in justice motive theory (cf. Dalbert, 2009). According to the theory, a motive or need to believe in a just world develops as children learn to forgo immediate gratification and instead pursue long-term goals. Interestingly, placing the roots of BJW in this need to believe in a just world is at odds with a central precept of justice motive theory—that the need to believe in a just world is an intrinsic part of normal human development and is, therefore, near-universal (Lerner, 1980). Thus, the theory posits that virtually all people should be motivated to believe that the world is just, and variability in the intensity of this motive results from *situational* (rather than dispositional) pressures, such as exposure to events that threaten the notion of a just world.

Evidence that BJW arises from the need to believe in a just world is sparse. For example, according to this perspective, BJW is "irrational," resulting less from a rational assessment of reality and more from an intrapsychic need. However, research does not tend to support this view. First, researchers have found nonsignificant relations between measures of irrational/rational thinking and BJW (Shorkey, 1980; Stowers & Durm, 1998; Thalbourne, 1995). Second, there is evidence of reality constraints on BJW. Those who can be expected to have experience with injustice in the world have a lower BJW, though results are admittedly mixed (Schmitt, 1998). Also, there is evidence that differences between individuals' endorsement of

personal vs. general BJW are largely reality-based (Sutton et al., 2008; Sutton & Winnard, 2007; Wu et al., 2013). Note that, if the primary source of BJW is not the motivation to believe in a just world described in justice motive theory, it is not surprising that individual differences in BJW rarely moderate experimental effects taken as demonstrations of a need to believe in a just world (see Hafer & Bègue, 2005).

If BJW is not entirely irrational, it might partly be based on an individual's or group's experience with injustice. As noted above, the evidence for a relation between experience and BJW is mixed. Many studies investigate BJW scores as a function of membership in relatively disadvantaged vs. advantaged groups (e.g., Calhoun & Cann, 1994; Hunt, 2000; O'Connor, Morrison, McLeod, & Anderson, 1996): Yet, the theoretical meaning of these demographic differences is unclear, given that demographic groups differ on many other characteristics (e.g., education, religiosity, culture) aside from experience with injustice. Research using direct measures of people's experience as a victim of injustice better supports an experience basis for BJW (e.g., Adoric & Kvartuc, 2007; Fasel & Spini, 2010; Fischer & Holz, 2010; Steensma & van Dijke, 2005–06). Most of these direct-measure studies, however, are cross-sectional surveys; thus, the causal direction of associations is speculative. Notably, people who experience injustice by virtue of belonging to a group that *perpetuates* injustice can also show heightened BJW, perhaps reflecting an effort to justify their unfair advantage (see Furnham, 1985).

Several authors have proposed social learning origins of BJW. From this perspective, BJW is encouraged through such processes as ideological teachings (e.g., Dittmar & Dickinson, 1993), popular culture (e.g., Gunter & Wober, 1983), and parental influence (e.g., Schönpflug & Bilz, 2004). Again, evidence is based on cross-sectional survey studies, making causal inferences impossible. Alves and Correia (2008, 2010a, 2010b) suggested that BJW is valued for its social function in enhancing productivity and maintaining order and cohesion. Indeed, people tend to affirm a BJW more strongly when

attempting to convey a positive image to others (e.g., Alves & Correia, 2008) and judge others more favorably when they affirm, vs. deny, a BJW (Alves & Correia, 2008, 2010a; see also Testé, Maisonneuve, Assilaméhou, & Perrin, 2012). Thus, BJW may be transmitted and maintained by communication processes because of the social purposes that it serves.

More generally, societal-level factors may be important determinants of BJW. Allen, Ng, and Leiser (2005) found that BJW was stronger among modernized and growing economies, and somewhat lower in countries that were high in social capital (e.g., social ties and cohesion). Furnham (1993) observed differences in BJW across 12 countries. These differences were associated with variations in power-distance norms, which are shared beliefs that reify social hierarchy. This finding provides evidence of a social determinant and a social function of BJW—the need to justify social inequality.

8.5   Summary and Future Directions

The study of individual differences in BJW has continued to thrive since Rubin and Peplau, inspired by Lerner's (1977) justice motive theory, developed the Just World Scale in 1973. Early critiques of the scale have spawned a number of alternative instruments that are increasingly popular. The recent trend is toward multiple scales assessing different forms of BJW. Personal vs. general forms of BJW is clearly one fundamental distinction. Other, less-researched distinctions also show promise. Given the popularity of dual process theories in psychology (Gawronski & Creighton, 2013), we expect that a division between implicit vs. explicit BJW (cf. Dalbert, 2001) will add to the roster in the future. Though newer measures have helped refine the concept of BJW, attempts to assess different forms of BJW have tended to occur in isolation of one another. Researchers should now begin to integrate the forms of BJW into a coherent theoretical framework.

The overall concept of BJW has been well validated by studies of correlates. First, BJW shows logical associations with presumed consequences of BJW, though research has focussed on reactions to victims, neglecting implications of BJW for reactions to advantaged members of society. Second, BJW is conceptually and empirically distinct from related individual differences. More research, however, should explore reasons for differential prediction by various forms of BJW. Such research will encourage theoretical integration of different forms of BJW.

Research on the significance of BJW in people's lives suggests that, overall, BJW benefits the self. Investigation of physical health benefits of BJW is a promising avenue for further research, given recent attention to the link between poor health and perceived unfairness (e.g., Jackson, Kubzansky, & Wright, 2006). The benefits vs. costs of BJW to society are more ambiguous. Certain forms of BJW seem to align with benefits, and other forms with costs: Thus, it is theoretically possible to reap some of the benefits of BJW while avoiding its pitfalls (Sutton & Douglas, 2005), a prospect that could be examined in further research. Overall, distinguishing between various forms of BJW or ways of believing in a just world is crucial in studying the relation between BJW and various criteria. In doing so, it is important to control one form of BJW while examining the other. For example, since personal and general BJW are inherently correlated, both should be measured, and their unique effects interpreted. Unless the closely related form of BJW is accounted for, researchers might draw unwarranted conclusions from their data.

Regarding the bases of BJW, there is little empirical or theoretical support for the notion that individual differences in BJW reflect variation in the motive to believe in a just world described by Lerner (1977). Yet, many researchers continue to equate individual differences in BJW with individual differences in the need to believe in a just world. A review incorporating unpublished data that is nonsupportive of equivalence might help end this ongoing confusion in the literature. More plausible bases of individual differences in BJW are experience with justice and injustice, social learning, and so on. Relevant future research should include longitudinal designs that address developmental processes, as well as tests of multiple pathways to individual differences in BJW.

In summary, there have been several major advances in research on BJW over the past 40 years. Yet, more work is needed. Given the current momentum in the field of BJW, we expect that the next decade will be an exciting time in which researchers will considerably deepen our understanding of the nature, foundations, and consequences of BJW.

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Anna Baumert and Manfred Schmitt

Justice is a fundamental value in human life. At the levels of both society and the individual, the argument has been made that a prosperous social life is not possible without justice as a standard for guiding the allocation of goods and burdens, interpersonal behavior, as well as the implementation of procedures; the sanctioning of violations of justice standards are also considered necessary (Montada, 2007). In psychology, sociology, and economy, justice has been identified as a human motive that cannot be reduced to a means for egoistic striving alone (e.g., Lerner, 2003; Miller & Ratner, 1996; Montada, 1998). Influential theories such as relative deprivation theory (Crosby, 1976; Stouffer, Suchman, DeVinney, Star, & Williams, 1949; Walker & Smith, 2002), equity theory (Adams, 1965; Walster, Walster, & Berscheid, 1978), and justice motive theory (Hafer & Bègue, 2005; Lerner, 1977, 1980) have been proposed to explain why and under which conditions a concern for justice shapes people's emotions and behavior. However, an exclusive focus on situational determinants

left large proportions of variance in justice-related reactions unexplained (Major & Deaux, 1982; Schmitt, 1996). For this reason, researchers have been increasingly interested in systematic individual differences in the endorsement of justice. On the one hand, broad personality dispositions, such as agreeableness or honesty/humility, have been tested as predictors of justice-related emotions and behavior (Colquitt, Scott, Judge, & Shaw, 2006; Van Hiel, de Cremer, & Stouten, 2008). On the other hand, specific justice-related dispositions have been proposed, for example, attitudes toward the distributive principles of equality, equity, and need (e.g., Sabbagh, Dar, & Resh, 1994). Some of these dispositions are aimed at capturing the degree to which an individual is concerned with justice, how strongly an individual endorses justice as a fundamental value, or in other words, the strength of an individual's justice motive.

Drawing on general equity theory, Huseman, Hatfield, and Miles (1987) proposed individual differences in equity sensitivity that capture the degree to which one tolerates a disproportionality of inputs and outcomes to one's own disadvantage (*benevolent*) or to one's own advantage (*entitled*). Despite its importance for triggering research on justice-related individual differences, the concept of equity sensitivity is limited in at least three ways. First, the concept confounds an individual's sensitivity to injustice and equity as one of several distributive principles

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that people rely on when making justice judgments. Second, equity theory and, consequently, equity sensitivity are confined to the domain of distributive justice, neglecting individual differences in sensitivity to procedural or retributive unfairness. Third, the benevolent and entitled types capture reactions to one's own unfair disadvantages and advantages, but the concept of equity sensitivity remains mute with regard to perceptions and reactions of uninvolved observers of injustice and of perpetrators who actively violate justice standards.

Most prominently, the belief in a just world was proposed as an indicator of individual differences in the justice motive (Rubin & Peplau, 1973; see Hafer & Sutton, 2016, Chap. 8 of this handbook). According to justice motive theory (Lerner, 1977, 1980), people are motivated to believe that people generally get what they deserve and deserve what they get. From an individual difference perspective, people endorse this belief to the degree that they have a need for justice. As discussed in the Chap. 8 of this handbook, there is compelling evidence that the belief in a just world is an important predictor of justice-related reactions (Furnham & Procter, 1989; Ross & Miller, 2002). However, it has to be noted that the need for justice, as captured by the belief in a just world, is assumed to be rooted in the need for order in the world because only a just world allows for goal-directed striving and the development of the ability to delay gratification (Lerner, 1980). People with a strong need for justice are motivated to protect their belief in a just world. When confronted with injustice and when lacking easily accessible options by which to actively restore justice, they have been found to engage disproportionately in cognitive distortions such as biased recall (Callan, Kay, Davidenko, & Ellard, 2009; see Ellard, Harvey, & Callan, 2016, Chap. 7 of this handbook) and the devaluation of innocent victims (e.g., Lerner & Simmons, 1966). These findings suggest that, when confronted with injustice, people with a strong belief in a just world do not necessarily react with strong negative emotions and an inclination to act in order to restore justice. Moreover, people with a strong belief in a just world do not

necessarily adhere to justice as a moral standard that guides their own actions.

In the present chapter, we will review research on justice sensitivity as a further specifically justice-related disposition that was proposed as an indicator of an individual's concern for justice (Baumert, Rothmund, Thomas, Gollwitzer, & Schmitt, 2013). Unlike the belief in a just world, this personality disposition directly captures stable and consistent differences in individuals' readiness to perceive injustice and in the strength of their cognitive, emotional, and behavioral reactions to injustice. We will present our review of the construct and the research it has sparked in six sections that build upon each other.

First, we will introduce the theoretical components of justice sensitivity and the differentiation of the concept according to the perspectives of a victim, observer, beneficiary, and perpetrator, all of which can be adopted toward an injustice. In this context, approaches for the assessment of justice sensitivity will be presented.

Second, we will review the correlational evidence. These results establish the justice sensitivity perspectives as novel personality dimensions that are sufficiently independent from personality factors and facets, cognitive abilities, as well as other specifically justice-related dispositions. In addition, the correlational patterns are informative with regard to the psychological meaning of the justice sensitivity perspectives and clearly indicate their distinctness.

Third, we will turn to the emotional and behavioral consequences of justice sensitivity as revealed in studies in the laboratory and in the field. We will review results on how the justice sensitivity perspectives shape reactions to perceived injustice, people's own adherence to justice standards, and more distal health outcomes.

Fourth, considerable effort has been undertaken to understand the psychological processes that translate the justice sensitivity perspectives into emotional and behavioral reactions. Here, we will provide an overview of the Sensitivity to Mean Intentions (SeMI) model proposed specifically for victim sensitivity and the research findings that support and refine its process assumptions. Subsequently, similarities and

distinctions regarding the cognitive processes involved in victim, observer, beneficiary, and perpetrator sensitivity will be discussed, empirical evidence will be summarized, and open research questions will be highlighted. To complete this section, the first studies revealing neuropsychological processes involved in justice sensitivity will be reviewed.

Fifth, we will raise the question of how justice sensitivity changes across the life span. The few existing studies on differences between age groups and on longitudinal trends in adolescence and adulthood will be discussed. Moreover, a social-cognitive developmental mechanism of rank-order change will be proposed.

In conclusion, we will stress the importance of justice sensitivity for a more complete understanding of justice-related emotion and behavior, and we will highlight open questions as well as future research directions that promise to substantially advance our insights into social justice phenomena.

9.1 Theoretical Components, Perspectives, and Measurement

Components. Initially focusing on the measurement of justice sensitivity from a victim's perspective, Schmitt, Neumann, and Montada (1995) and Schmitt (1996) suggested that the construct was comprised of four components. First, as a perceptual component, justice sensitivity is assumed to involve the *activation threshold* and *activation potential* of concepts related to injustice. Accordingly, justice-sensitive people's information processing should be guided in a way that raises their probability of experiencing injustice compared with less justice-sensitive people. On the basis of this argument, Schmitt et al. (1995; Schmitt, 1996) employed the self-reported frequency of injustice to measure justice sensitivity.

Second, *affective reactivity toward perceived injustice* is assumed to be at the core of justice sensitivity. Emotional reactions to injustice should be stronger the more justice is endorsed as a fundamental value. Research has revealed that anger is a typical qualitative response to one's

own undeserved disadvantages (Mikula, 1986). Therefore, Schmitt et al. (1995; Schmitt, 1996) assessed the intensity of anger reactions to experiences of injustice from a victim's perspective.

Third, the *duration of cognitive preoccupation with incidents of injustice* was proposed as a component. Personally important and emotionally arousing incidents tend to preoccupy people's minds (Rimé, Philippot, Boca, & Mesquita, 1992). Thus, justice-sensitive people should ruminate longer and more intensively about experienced injustice than less justice-sensitive people. Accordingly, Schmitt et al. (1995; Schmitt, 1996) assessed the intrusiveness of thoughts about an injustice as a cognitive reaction.

Fourth, as a motivational component, the *inclination to restore justice and undo injustice* should constitute a component of justice sensitivity. As retaliatory and retributive acts are typical ways of achieving these goals, Schmitt et al. (1995; Schmitt 1996) assessed punitivity toward a transgressor.

Schmitt et al. (1995; Schmitt, 1996) tested the factor structure of self-report scales for each component. They revealed substantial convergence of the proposed components with the strongest convergence between emotional and ruminative reactions. In an attempt to increase the efficiency of assessment, Schmitt, Gollwitzer, Maes, and Arbach (2005) developed a 10-item scale and dropped the frequency of experienced injustice and punitivity as indicators of justice sensitivity. Nevertheless, perceptual and motivational processes are still assumed to be core elements of the construct. Recently, Thomas, Baumert, and Schmitt (2013) took the first steps toward complementing Schmitt et al.'s (2005) scales by adding items that more directly capture a person's perceptual readiness for injustice (e.g., "I notice very quickly if I am unfairly treated."). Also, researchers recently developed ultra-short two-item scales that include only the strength of emotional reactions to injustice for the assessment of justice sensitivity (Baumert, Beierlein et al., 2014). Despite the reduced content validity of this instrument, several studies have revealed promising results with regard to its construct and criterion validity (Back et al., 2013; Baumert,

Beierlein et al., 2014; Rothmund, Baumert, & Zinkernagel, 2014; Stavrova, Schlösser, & Baumert, 2014).

Four perspectives on injustice. Reactions to injustice have been found to be qualitatively and quantitatively different depending on the perspective that a person takes (Mikula, 1994; Mikula, Petri, & Tanzer, 1990). Perceiving that one has been a victim of injustice typically triggers anger as the immediate emotional response, observing injustice as a bystander may lead to moral outrage, and assuming the role of a passive beneficiary or an active perpetrator of injustice can lead to feelings of guilt and shame (e.g., Weiss, Suckow, & Cropanzano, 1999). To account for these qualitatively different perspectives, justice sensitivity has been differentiated into victim, observer, beneficiary, and perpetrator sensitivity (Schmitt et al., 2005; Schmitt, Baumert, Gollwitzer, & Maes, 2010). As reported above, 10-item and two-item scales have been developed to measure these sensitivities. The scales employ items that are parallel in wording but vary in the role one assumes in an incident of injustice as well as in the emotional response referred to. Please see Table 9.1 for example items for each justice sensitivity perspective. Several studies have confirmed the assumed four-factor structure of these scales (Baumert, Beierlein et al., 2014, Schmitt et al., 2005, 2010). Despite considerable correlations between the sensitivities, they cannot be reduced

to fewer dimensions without a significant loss of information.

The pattern of correlations between the four scales is consistent with theoretical similarities between the justice sensitivity perspectives (Schmitt et al., 2010). All scales were found to be positively correlated, assumedly reflecting a general concern for justice. Beneficiary and perpetrator sensitivity were found to be the most highly correlated in agreement with the shared psychological constituents of these roles, namely, "(a) benefiting from an unfair advantage, (b) guilt as the respective moral emotion (Mikula, Scherer, & Athenstaedt, 1998; Montada, Schmitt, & Dalbert, 1986), (c) a tendency toward self-punishment in reaction to the unfair advantage (Nelissen & Zeelenberg, 2009), and (d) a desire to compensate the victim(s) of the unfairness (Montada & Schneider, 1989; Tobey-Klass, 1978)" (Schmitt et al., 2010, p. 216). Observer sensitivity has only two elements in common with beneficiary and perpetrator sensitivity (beneficiary/perpetrator punishment and victim compensation). Accordingly, correlations between these perspectives were found to be lower. The smallest correlations were found for victim sensitivity and beneficiary and perpetrator sensitivity. This result is consistent with expectations because of a negative interdependence of the outcomes of victims on the one hand and beneficiaries or perpetrators on the other hand. For victim and observer sensitivity, slightly higher correlations had been theoretically expected because an

Table 9.1 Example item for each justice sensitivity perspective and correlations between scales as reported by Schmitt et al. (2010)/Baumert, Beierlein et al. (2014)

	Example items	Observer	Beneficiary	Perpetrator
Victim	It makes me angry when others are undeservingly better off than me	.52/.45	.33/.26	.32/.22
Observer	I get upset when someone is undeservingly worse off than others		.70/.46	.62/.45
Beneficiary	I feel guilty when I am better off than others for no reason			.77/.72
Perpetrator	I feel guilty when I enrich myself at the cost of others			

unaffected bystander can take the perspective of the victim and hence experience similar but less intense emotional reactions. In addition, anger and moral outrage, as the typical emotional reactions of victims and bystanders, have been discussed as being highly psychologically similar (e.g., Batson et al., 2007). Again, the empirical findings were consistent with expectations (Schmitt et al., 2010).

Besides evidence for the validity of the factor structure of the scales used to assess justice sensitivity, further studies have provided extensive evidence for the specificity of the four justice sensitivity perspectives with regard to correlates as well as to emotional and behavioral consequences. In the paragraphs that follow, we will review these findings.

9.2 Locating Justice Sensitivity in the Nomological Network of Personality

Personality, *cognitive abilities*, *and justice-related dispositions*. A new construct can be established in psychological theory, research, and practice only if it is nonredundant with existing constructs. Here, we will review correlational evidence regarding personality factors and facets, cognitive abilities, and more specifically, justice-related dispositions. Furthermore, we will discuss correlational evidence that sheds light on the psychological distinctions between the different justice sensitivity perspectives.

Highlighting the usefulness of the justice sensitivity construct, empirical results have shown that the justice sensitivity perspectives cannot be reduced to general Big 5 personality factors (Schmitt et al., 2005) or to a combination of Big 5 personality facets (Schmitt et al., 2010). Regarding cognitive abilities, there is preliminary evidence ($N=87$; Baumert, unpublished data) that the justice sensitivity perspectives are not correlated with working memory capacity (assessed with a 16-item computation span task; Oberauer, Süß, Schulze, Wilhelm, & Wittmann, 2000; also see Hofmann, Gschwendner, Wiers, Friese, & Schmitt, 2008) and crystallized intel-

ligence (assessed with a 34-item multiple-choice vocabulary test; Lehrl, Merz, Burkard, & Fischer, 1991). Small to moderate correlations were found with fluid intelligence as measured by 15 Raven matrices (victim sensitivity: $r=.15$, ns; observer sensitivity: $r=.25$, $p<.05$; beneficiary sensitivity: $r=.21$, $p<.05$; perpetrator sensitivity: $r=.21$, $p<.05$).

Moreover, the justice sensitivity perspectives have been shown to be largely independent from other justice-related dispositions. For example, small correlations were reported for justice sensitivity and the general belief in a just world and moderate correlations for justice sensitivity and belief in an unjust world (Schmitt et al., 2005). In a German student sample ($N=455$; Baumert, unpublished data), small correlations were found with the personal belief in a just world (victim sensitivity: $r=-.10$, $p<.05$; observer sensitivity: $r=-.06$, ns; beneficiary sensitivity: $r=-.002$, ns; perpetrator sensitivity: $r=.15$, $p<.01$).

Small correlations were also reported for justice sensitivity and attitudes toward principles of distributive justice (Schmitt, Maes, & Schmal, 1997). Specifically, in a representative sample of the German population, victim sensitivity was uncorrelated with attitudes toward equity, equality, and need ($-.05<r<.09$); and observer and beneficiary sensitivity were uncorrelated with the attitude toward equity ($-.06<r<.00$) and moderately positively correlated with the attitude toward equality and need as distributive principles ($.12<r<.26$; Schmitt et al., 1997; see Faccenda & Pantaléon, 2011, for similar findings in an interview study). These results are particularly interesting because they suggest that justice sensitivity does not involve a specific interpretation of what constitutes an injustice. Rather, justice-sensitive people react strongly to subjective injustice, independent of the justice principle they see as being violated in a specific situation.

Psychological distinctions of the justice sensitivity perspectives. Correlations with measures of other trait variables have shed light on the psychological meaning and functioning of the different justice sensitivity perspectives. Such correlational findings have consistently suggested

that victim sensitivity involves antisocial tendencies and reflects a concern for justice for the *self*, whereas observer, beneficiary, and perpetrator sensitivity are prosocial perspectives reflecting a *genuine* concern for justice (Gollwitzer, Schmitt, Schalke, Maes, & Baer, 2005; Schmitt et al., 2005). For example, Schmitt et al. (2005) reported correlations of victim sensitivity with negative interpersonal feelings, such as jealousy, vengeance, and paranoia; and correlations of observer and beneficiary sensitivity with prosocial dispositions, such as empathy and social responsibility. Regarding correlations with Big 5 facets, victim sensitivity was found to be negatively related to compliance, whereas observer, beneficiary, and perpetrator sensitivity were positively related to modesty and tender-mindedness, all facets of agreeableness (Schmitt et al., 2010).

In addition, positive correlations of victim sensitivity with neuroticism and negative correlations with interpersonal trust, self-efficacy, and internal locus of control (Baumert, Beierlein et al., 2014) support the notion that this justice sensitivity perspective involves the fear of being exploited (Gollwitzer et al., 2005). The inclination of victim-sensitive persons to act antisocially and uncooperatively—which is also reflected by a negative correlation of victim sensitivity with the tendency to reciprocally return favors and a positive correlation with the tendency to reciprocally retaliate when disadvantaged (Baumert, Beierlein et al., 2014)—has been consequently interpreted as an attempt to prevent one's own undeserved disadvantages (Gollwitzer et al., 2005). Interestingly, Back et al. (2013) reported a positive correlation of victim sensitivity with narcissistic rivalry as "the tendency to prevent social failure by means of self-defense (*antagonistic self-protection*)" (Back et al., 2013, p. 7).

The distinctiveness of victim sensitivity on the one hand and observer, beneficiary, and perpetrator sensitivity on the other hand is further emphasized by correlations with moral dispositions. In a student sample ($N=131$), Rothmund, Männel, and Altzschner (2012) found that observer, beneficiary, and perpetrator sensitivity were positively related to measures of moral

identity (Aquino & Reed, 2002; $.21 < r < .36$) and justice and harm/care as moral foundations (Graham et al., 2011; $.34 < r < .48$). By contrast, victim sensitivity was uncorrelated with these moral dispositions, but correlated with chronic avoidance orientation (Elliot & Trash, 2010).

A recent study ($N=491$; Baumert, Schlösser, & Schmitt, 2014) employing 10 items to measure honesty/humility as a factor of the HEXACO personality model (Ashton & Lee, 2009) also provided evidence for the distinction between the prosocial justice sensitivity perspectives and victim sensitivity as involving antisocial tendencies. The honesty/humility factor includes the inclination to act in accordance with fairness principles as a facet, in addition to sincerity, greed-avoidance, and modesty as further facets (example item: "I wouldn't use flattery to get a raise or promotion at work even if I thought it would succeed"). In detail, the following correlations with honesty/humility were found: with victim sensitivity $r=-.19$; with observer sensitivity $r=.16$; with beneficiary sensitivity $r=.27$; with perpetrator sensitivity $r=.42$. Importantly, this pattern of correlations also helps us to understand distinctions between the prosocial justice sensitivity perspectives. The high correlation between honesty/humility and perpetrator sensitivity suggests that this justice sensitivity perspective in particular captures a reluctance to violate fairness principles, whereas the other justice sensitivity perspectives may be more relevant to *reactions* to violations of fairness principles.

Also highlighting specific differences between the prosocial justice sensitivity perspectives, Baumert, Beierlein et al. (2014) found that observer and beneficiary sensitivity were positively related to the readiness to make social comparisons, but perpetrator sensitivity was unrelated to social comparisons. Perpetrator sensitivity is assumed to entail the readiness to anticipate or detect one's own transgressions, thus reflecting a reliance on internalized justice standards rather than on comparisons with the behavior of others. With regard to the inclination to return favors one has received, interestingly, positive reciprocity was uncorrelated with beneficiary sensitivity but positively correlated with

observer and perpetrator sensitivity. From a beneficiary perspective, a favor given to oneself is perceived as one's own unjust advantage that potentially disadvantages a third person who might have deserved the favor instead. Hence, rather than reciprocally returning favors that they receive, beneficiary-sensitive persons should be highly motivated to compensate disadvantaged others, particularly if the disadvantage is causally linked to their own advantage.

9.3 Prediction of Justice-Related Emotion and Behavior

The justice sensitivity perspectives have been successfully employed to predict emotional reactions to injustice and justice-related behavior. In many cases, justice sensitivity has been a better predictor than alternative constructs, and the scales have shown incremental validity in the context of competing dispositional measures. In sum, the empirical results support the notion that each justice sensitivity perspective reflects an individual's justice motive to some degree. In the following paragraphs, we will first report the results of studies that tested how specific justice sensitivity perspectives predict reactions to perceived injustice; we will then focus on adherence to justice standards in one's own behavior as a criterion to be predicted; and finally, we will review consequences of justice sensitivity for health as a more distal outcome.

Reactions to perceived injustice. In various domains, justice-sensitive people have been found to display stronger emotional and behavioral reactions to subjective unfairness than less justice-sensitive people. This evidence was initially obtained for victim sensitivity. Mohiyeddini and Schmitt (1997) investigated anger and protests against an unfair competition in the laboratory. Victim sensitivity measured several weeks in advance was a better predictor of reactions to one's own disadvantages in this competition than trait anger or self-assertiveness. Similarly, victim-sensitive participants reacted with stronger anger than less victim-sensitive people when

they were intentionally put at a disadvantage by a team partner in a game played to win book vouchers (Gollwitzer & Rothmund, 2011, Study 1; see Gollwitzer, 2005, for similar results). Victim sensitivity also predicted protests against one's own disadvantages and retaliatory behavior in cases of unfairness in the field. In a German university, a lottery was employed to assign students to seminars of varying attractiveness. Victim-sensitive students perceived the lottery as more unjust than less victim-sensitive students and approved more strongly of activities aimed at changing the allocation procedure (Schmitt & Mohiyeddini, 1996). In a survey of recently laid-off employees, victim sensitivity was correlated with the level of retaliatory intentions (e.g., damaging the company's reputation, filing complaints) against the former employer (Schmitt, Rebele, Bennecke, & Förster, 2008). In these studies, only victim sensitivity was measured or reported, respectively. Therefore, we can only speculate about whether the reported effects generalize across the justice sensitivity perspectives or are instead specific to the victim's perspective.

With regard to political decisions about a public transportation project in Germany, specifically observer sensitivity (and not victim sensitivity) was found to determine the level of political protest (Rothmund et al., 2014). Observer-sensitive people tended to perceive the political decision procedure that preceded the initiation of an expensive construction project aimed at renewing the Stuttgart Central Railway Station ("Stuttgart 21") as more unfair than less observer-sensitive people. Mediated by these perceptions, observer-sensitive people reacted with stronger outrage and intentions to protest against the project.

In a study on moral courage (Baumert, Halmburger, & Schmitt, 2013), specifically beneficiary sensitivity (and not victim, observer, or perpetrator sensitivity) was found to predict protests against a witnessed theft. Among other dispositions, justice sensitivity was measured 1 week in advance. Then participants were invited one by one into the laboratory where a confederate pocketed the mobile phone of an alleged participant in the presence of the actual participants.

Only beneficiary sensitivity—and not dispositions such as empathy, self-efficacy, or anxiety—was a significant predictor of the readiness to intervene and stop the theft. This result suggests that failing to protest against a norm violation and thus avoiding the potential cost of being aggressed by the norm violator would create an illegitimate advantage of the observer compared with the victim. It seems that this anticipated advantage serves as the motivational force of beneficiary-sensitive bystanders.

In a longitudinal study in an intergroup context, beneficiary sensitivity shaped solidarity with a relatively disadvantaged group. After the reunification of Germany, East Germans continued to experience a lower standard of living than West Germans. Nevertheless, financial transfers from West to East Germany were controversial. Gollwitzer et al. (2005, Study 2) investigated whether justice sensitivity would predict the willingness of West Germans to contribute to improving the living conditions of East Germans across a 2-year interval. As expected, beneficiary sensitivity of (the advantaged) West Germans—and not victim sensitivity—determined their solidarity with (the disadvantaged) East Germans.

Furthermore, observer and beneficiary sensitivity have been shown to be relevant determinants of reactions to unequal allocations in the context of economic games. Fetchenhauer and Huang (2004), Lotz, Baumert, Schlösser, Gresser, and Fetchenhauer (2011), and Baumert, Schlösser and Schmitt (2014) employed variants of a so-called three-person game (Brandstätter, Güth, Himmelbauer, & Kriz, 1999). In this game, three anonymous persons interact in different roles. They are informed that Person A will receive a financial endowment and will be free to allocate any share of it to Person B, who is powerless and cannot change A's allocation. In the version of the game employed by Lotz et al. (2011), participants were further informed that Person C would also be endowed with an amount of money that he or she was free to employ to reduce or augment the outcomes of Persons A and B. Changing the other persons' outcomes was costly. In Lotz

et al.'s study, changing an outcome by 1 € cost 0.50 €. When confronted with an unequal allocation by Person A (10:0), a substantial proportion of participants in the role of Person C invested their own money to change the other persons' outcomes. As the interaction partners remain anonymous and cannot interact again, Person C's investment is assumed to be altruistically motivated and therefore called *altruistic punishment* (when Person A's outcome is reduced) and *altruistic compensation* (when Person B's outcome is increased). Most importantly, observer- and beneficiary-sensitive people invested more money in altruistic punishment and compensation than less sensitive people. Moreover, Lotz et al. found that moral outrage mediated the impact of observer and beneficiary sensitivity on reactions to A's unfairness.

On the one hand, the reported findings suggest that, in general, justice-sensitive persons experience injustices as more adverse than less justice-sensitive persons. All justice sensitivity perspectives appear to share this psychological aspect and, thus, they capture the individual's concern for justice. On the other hand, these studies highlight some specifics of the justice sensitivity perspectives. Which justice sensitivity perspective is predictive of reactions to subjective unfairness should depend on the role a person assumes in the specific situation. If a person is disadvantaged as was the case in the studies by Mohiyeddini and Schmitt and Gollwitzer and Rothmund, victim sensitivity can be assumed to be the relevant facet that determines this person's reactions; if people are not directly affected by a decision but judge it from a neutral standpoint as was the case in "Stuttgart 21," observer sensitivity is the relevant predictor of emotion and behavior; and if people perceive themselves as relatively advantaged (e.g., due to receiving a better role in the three-person game by chance), beneficiary sensitivity predicts their reactions to an unfairness.

Adherence to justice principles. So far, we have focused on reactions to perceived injustice. However, the justice motive should also shape a person's inclination to act in accordance with jus-

tice principles. Here, the justice sensitivity perspectives have to be further distinguished. Consistent with the correlational findings reviewed above, observer, beneficiary, and perpetrator sensitivity have been shown to enhance prosocial behavior and the adherence to justice principles in various domains. By contrast, victim sensitivity fosters self-oriented behavior aimed at preventing or compensating one's own disadvantages.

Further evidence for the prosocial effects of justice sensitivity has been provided by economic games. Fetchenhauer and Huang (2004) employed a dictator game and showed that observer- and beneficiary-sensitive people were more likely to split a financial endowment equally with an anonymous other person compared with less observer- and beneficiary-sensitive people even though this other person had no ability to retaliate against them (for similar results, also see Baumert, Schlösser & Schmitt, 2014; Edele, Dziobek, & Keller, 2013). Lotz, Schlösser, Cain, and Fetchenhauer (2013) extended this research and showed that persons high in observer, beneficiary, or perpetrator sensitivity gave a substantial share of money to the powerless other person even when circumstances tempted them to act selfishly. To manipulate temptation, the instructions in the dictator game were varied. Persons low in observer, beneficiary, or perpetrator sensitivity shared to the same degree as persons high in these sensitivity perspectives only when the instructions were to take away the endowment of the other person (low temptation; reversed property rights of the initial endowment; Oxoby & Spraggon, 2008), but they shared substantially less when they were instructed to give some of their own endowment and even less when the powerless receiver was led to believe that payoffs depended on a lottery rather than on another participant's choice (high temptation). These findings suggest that observer, beneficiary, and perpetrator sensitivity involve a genuine concern for justice as reflected in the adherence to justice principles even under conditions of high temptation.

In an additional study, beneficiary sensitivity was found to shape how likely people were to act in accordance with norms and rules. Specifically, beneficiary-sensitive people reported fewer instances of their own shoplifting and free-riding and less of an inclination to engage in insurance fraud than persons lower in beneficiary sensitivity (Gollwitzer et al., 2005, Study 3). In this context, perpetrator sensitivity might have been a relevant predictor as well, but it was not assessed in the reported study. Focusing on the perpetrator perspective, Stavrova et al. (2014) reported results suggesting that perpetrator sensitivity determines the job-seeking behavior of unemployed people. In a survey study, they found that unemployed perpetrator-sensitive individuals were more likely to engage in active job-search behavior and had lower chances of long-term unemployment. As an explanation, the authors proposed that perpetrator-sensitive people may experience profiting from the welfare system as unjust and feel guilty about not contributing to the work force, thus being highly motivated to end their state of unemployment.

Drawing on these findings, it has been suggested that high levels of observer, beneficiary, and perpetrator sensitivity may be regarded as a social resource, particularly in situations of conflict and crisis when solidarity and the adherence to justice principles are important for restoring the functioning of a group or society (Baumert, Thomas, & Schmitt, 2012; Thomas, Baumert, & Schmitt, 2011). By contrast, victim sensitivity appears to be a risk factor in social interactions that may undermine cooperation, the resolution of conflicts, and prosocial engagement.

Gollwitzer et al. (2005, Study 3) revealed positive correlations between victim sensitivity and self-reported norm violations that maximized one's own outcomes such as tax evasion, shoplifting, or insurance fraud. Moreover, with regard to these transgressions, persons high in victim sensitivity displayed a higher accessibility of legitimizing cognitions (e.g., "This act did not seem wrong to me") than persons low in victim sensitivity. Among soccer players, victim sensitivity predicted intentions to adopt transgressive behaviors in response to unfair referee decisions (Faccenda, Pantaléon, & Reynes, 2009). Gollwitzer and colleagues proposed that

victim-sensitive people readily act antisocially because they want to avoid the risk of being exploited.

A study by Gollwitzer, Rothmund, Pfeiffer, and Ensenbach (2009) tested the impact of justice sensitivity on the willingness to cooperate and invest in the common good under conditions of varying levels of the *threat of being exploited*. Results showed that persons high in observer sensitivity maintained a higher level of investment in the common good than persons low in observer sensitivity even if there were substantial cues indicating that interaction partners may deceive and exploit their cooperativeness. By contrast, persons high in victim sensitivity appeared to fear exploitation and victimization and, as a consequence, were reluctant to cooperate even in situations in which there were only slight indications of a lack of their interaction partners' trustworthiness.

In a further study, Gollwitzer and Rothmund (2011, Study 2) provided evidence that indeed victim-sensitive people want to avoid being exploited rather than to seek compensation for past disadvantages (in the sense of *equity with the world*; Austin & Walster, 1974). In a so-called trust game (Berg, Dickhaut, & McCabe, 1995), victim-sensitive people demonstrated a reluctance to cooperate after they had been disadvantaged by a greedy interaction partner in an unrelated situation, but not after suffering a disadvantage due to bad luck. Similarly, Rothmund, Gollwitzer, and Klimmt (2011) showed the reduced cooperativeness of victim-sensitive people in a trust game situation after these participants interacted with an aggressive virtual character in a violent video game.

It seems evident that such self-protective antisocial behaviors by victim-sensitive persons involve the risk of triggering and fueling interpersonal conflict if interaction partners in turn feel unfairly treated by the victim-sensitive persons' uncooperativeness. More research has highlighted that victim sensitivity can also be a risk factor that undermines the constructive resolution of conflicts. In an alleged conflict over the allocation of tuition fees among the departments of a German university, interventions aimed at reducing attri-

butions of mean intentions to the opposing conflict party were less effective among victim-sensitive than among less victim-sensitive persons (Baumert, Nazlic, & Alrich, 2013). Furthermore, in the context of close interpersonal relationships, victim sensitivity reduced forgiveness after participants were harmed by their partner (Gerlach, Allemand, Agroskin, & Denissen, 2012). First, victim sensitivity was found to be negatively correlated with dispositional forgiveness. Second, in response to descriptions of the partner's potential transgressions, victim-sensitive persons reported less willingness to forgive than less victim-sensitive persons. Third, as mediating processes of this adverse effect of victim sensitivity, the authors identified mistrustful interpretations of the partner's post-transgression behavior, cognitions legitimizing one's own antisocial reactions, and a lack of pro-relationship cognitions. Moreover, victim-sensitive persons' reactions were largely independent of the partner's intentions to promote reconciliation. In sum, victim-sensitive people appear to be at risk of triggering, worsening, and perpetuating social conflicts.

Finally, Traut-Mattausch, Guter, Zanna, Jonas, and Frey (2011) and Agroskin, Jonas, and Traut-Mattausch (2014) demonstrated that victim-sensitive people tended to oppose political reforms because they experienced reactance and because they distrusted the initiators of the reforms. Thus, victim sensitivity may also be a risk factor in the political domain in the sense that disproportionate suspiciousness and the ascription of sinister motives to political actors with opposing opinions may be likely to fuel the escalation of conflicts and inhibit constructive conflict resolution.

Health outcomes. In line with this conclusion, there is consistent evidence that victim sensitivity is a risk factor that endangers not only a person's interpersonal functioning but also his or her health. In a survey study of factory employees (Schmitt & Dörfel, 1999), victim-sensitive workers were more at risk of experiencing procedural unfairness in their workplace than less victim-sensitive workers. In addition, when feeling unfairly treated, victim-sensitive workers were

more likely to feel sick at work and to call in sick than their less victim-sensitive colleagues. Similarly, in a study of teachers with and without a diagnosed mental illness (Pretsch, Hessler, & Schmitt, 2012), victim sensitivity predicted levels of self-reported depression, and this relation was partially mediated by a subjective imbalance between one's efforts and investments at work and one's outcome and rewards in the form of payment, recognition, or promotion prospects (effort-reward imbalance; Siegrist, 2002).

Also, in a survey employing the ultra-short justice sensitivity scales, victim sensitivity was correlated with subjective effort-reward imbalance and with psychological strain but not with physical impairment (Beierlein, Baumert, Schmitt, Kemper, & Rammstedt, 2013). More generally, victim sensitivity was found to be related to lower life satisfaction (Baumert, Beierlein et al., 2014).

Whereas high victim sensitivity can be assumed to be particularly detrimental to a person's health, high observer, beneficiary, and perpetrator sensitivity might also have negative self-implications. For example, frequently experiencing strong outrage or guilt might decrease one's psychological well-being. Pretsch et al. (2012) also found that high observer sensitivity was associated with an increased depressivity among teachers. The correlations reported by Beierlein et al. (2013) suggest that only victim sensitivity is associated with a subjective effort-reward imbalance at work, but that high beneficiary sensitivity also goes along with psychological strain. Similarly, whereas the correlation was strongest for victim sensitivity, in Baumert, Beierlein et al. (2014) data, observer and beneficiary (but not perpetrator) sensitivity were also negatively correlated with life satisfaction.

In conclusion, all justice sensitivity perspectives appear to share a concern for justice and, thus, reflect the justice motive to some degree. Observer, beneficiary, and perpetrator sensitivity predict prosocial tendencies and are considered to be indicators of a genuine concern about justice for others. By contrast, victim sensitivity seems to involve a motivational mixture of a concern for

justice and the fear of being exploited by others. As a result, high victim sensitivity may represent a risk factor undermining interpersonal cooperation and reconciliation, the adherence to justice principles, as well as psychological well-being.

9.4 Psychological Processes Translating Justice Sensitivity into Emotion and Behavior

The Sensitivity to Mean Intentions model. Gollwitzer and Rothmund (2009; Gollwitzer, Rothmund, & Süssenbach, 2013) have elaborated on the motivational and social-cognitive processes involved in victim sensitivity in their SeMI model. They propose that "victim sensitivity reflects the combination between [*sic*] how much people value trustworthiness (and disapprove of untrustworthiness) and a generalized expectation that others are not trustworthy" (Gollwitzer, Rothmund, & Süssenbach, 2013, p. 417). Because victim-sensitive people experience being exploited as particularly aversive, they are assumed to give disproportionate weight to contextual cues that signal the untrustworthiness of interaction partners. When such cues are present, the model posits that a so-called suspicious mindset is activated in victim-sensitive people. This mindset entails highly available hostile interpretations, an avoidance-related motivational state, and cognitions legitimizing one's own norm transgressions as a means for self-protection. As a result, persons high in victim sensitivity tend to avoid situations in which they have to rely on other people to adhere to justice principles. Thus, persons high in victim sensitivity are not merely egoistic maximizers of their own benefit; they behave in an uncooperative manner only in situations in which they fear being exploited by others.

The evidence reviewed above confirms that victim-sensitive people (a) tend to distrust others (Agroskin et al., 2014; Schmitt et al., 2005), (b) react with strong emotions to interaction partners' unfair behavior that puts them at a disadvantage (Gollwitzer, 2005; Gollwitzer &

Rothmund, 2011; Mohiyeddini & Schmitt, 1997), and (c) reduce their cooperation when there is a threat of being exploited (Gollwitzer et al., 2009; Rothmund et al., 2011). In addition, research by Gerlach et al. (2012, see above) supports the idea that victim-sensitive people (d) have a suspicious mindset that is easily activated and entails mistrustful interpretations and legitimizing cognitions as processes that mediate their adverse reactions. Further evidence corroborating the assumptions of the SeMI model has been provided by studies on the detection of potential defectors (Gollwitzer, Rothmund, Alt, & Jekel, 2012). In a first study, victim-sensitive persons rated faces with angry-looking and neutral expressions as less trustworthy than less victim-sensitive persons did. In a second study, victim-sensitive participants generally underestimated the cooperativeness of people of whom they saw only short video clips. These studies support the idea that victim-sensitive persons (e) give disproportionate weight to cues of untrustworthiness.

Justice-sensitive information processing. The elaboration of the SeMI model has been a first step in directing the focus of research toward the idea that social-cognitive processes mediate the effects of victim sensitivity. In a more general approach, all justice sensitivity perspectives can be assumed to systematically guide the processing of justice-related information. In various individual difference domains, research on personality-congruent information processing has contributed substantially to a process-oriented understanding of how personality dispositions function and shape emotions and behavior (Baumert & Schmitt, 2012; Rusting, 1998). For example, attention and interpretation biases have been shown to be involved in trait anxiety and to causally contribute to a vulnerability to anxiety (e.g., MacLeod, Rutherford, Campbell, Ebsworthy, & Holker, 2002; Mathews & Mackintosh, 2000). Following this approach, several studies have been conducted on patterns of justice-related information processing.

All four justice sensitivity perspectives are assumed to involve the individual *activation* *potential* of justice-related concepts. In situations containing justice-related cues, these concepts should be activated and should consequently guide attention and interpretation more strongly in justice-sensitive people than in less justice-sensitive people. Supporting this assumption for observer sensitivity, studies have shown that after witnessing an unjust incident, persons high in this justice sensitivity perspective attended more strongly to unjust cues and interpreted ambiguous situations as less just than persons low in justice sensitivity (Baumert, Gollwitzer, Staubach, & Schmitt, 2011; Baumert & Schmitt, 2009). Importantly, these effects were domain-specific: Observer sensitivity shaped only the processing of justice-related information, but not the processing of justice-unrelated negatively or positively valenced information. For victim sensitivity, there is evidence that persons high in this justice sensitivity perspective more readily interpret ambiguous situations as just or unjust than less justice-sensitive persons. Specifically, victim sensitivity was found to increase the speed with which individuals resolved ambiguous sentence fragments in cases in which the resolution yielded an unjust connotation as well as in cases in which the resolution yielded a just connotation, but not when the resolution was neutral with respect to justice (Baumert, Otto, Thomas, Bobocel, & Schmitt, 2012).

As a second assumption, all four justice sensitivity perspectives have been proposed to involve the *degree of elaboration* of justice-related concepts that enable persons high in justice sensitivity to better encode pertinent information. Providing support for this assumption, observer and victim sensitivity have been shown to enhance the accuracy of memory performance for just and unjust information (but not for in/justice-unrelated information; Baumert et al., 2011, 2012; Bell & Buchner, 2010).

Taken together, these studies shed light on the social-cognitive processes that explain the emotional and behavioral consequences of justice sensitivity. Specifically, selective attention, interpretation, and encoding may predispose persons high in justice sensitivity to have strong reactions toward injustice, whereas persons low

in justice sensitivity might not notice potential injustices at all. These studies also speak in favor of the justice sensitivity perspectives as indicators of the justice motive because selective information processing is a crucial characteristic of motives (McClelland, 1985).

Future research on social-cognitive processes may highlight commonalities and distinctions between the justice sensitivity perspectives. As stated above, the activation potential and elaboration of justice-related concepts are assumed to be involved in each justice sensitivity perspective. However, the activated concepts may differ in their content depending on the perspective that a person adopts in a specific situation involving a potential injustice. As a consequence, the adopted perspective will determine whether victim, observer, beneficiary, or perpetrator sensitivity guides information processing and, hence, emotional and behavioral reactions. In addition, the symmetry or asymmetry of the processing of just and unjust information may differ systematically across the justice sensitivity perspectives (Gollwitzer et al., 2013). More research is needed in this area.

More research is also needed to test the causal impact of the information-processing patterns that have been revealed for emotional and behavioral reactions. The first steps have been taken to directly manipulate information processing and train those patterns of selective interpretation that are assumed to be chronically involved in justice sensitivity. Studies have shown, for example, that readily anticipating one's own unfair disadvantage decreases the willingness to cooperate in subsequent situations (Maltese, Baumert, Schmitt, & MacLeod, in press). In a similar vein, participants trained to readily interpret their own advantages as undeserved were found to invest more of their own resources to compensate victims of others' unfairness (Maltese, Baumert, Knab, & Schmitt, 2013). These results support the basic assumption that patterns of selective interpretation causally contribute to justice-sensitive behavior. Besides their theoretical relevance, for practical purposes, approaches to induce justice-sensitive information processing may represent ways to enhance prosocial behavior and mitigate the risk of uncooperativeness.

Neuropsychological processes. Researchers have started to use neuroscience in order to further elucidate the computational processes involved in morally relevant and justice-related judgments (e.g., Buckholtz & Marois, 2012; Young & Koenigs, 2007). Recently, this research has been complemented by an individual difference perspective, and two studies have addressed the neuropsychological underpinnings of justice sensitivity. Leue, Lange, and Beaducel (2012) took a first step in this direction by employing an EEG study to investigate how perpetrator sensitivity is related to the neurocognitive processing involved in deception. Most interestingly, in an fMRI study, Yoder and Decety (2014) examined how the prosocial perspectives of justice sensitivity (observer, beneficiary, and perpetrator sensitivity) modulate neural responses to film clips depicting the intentional harming or helping of another person. For more justice-sensitive persons, stronger reactions to bad actions were found in brain areas responsible for the understanding of mental states and, specifically, the intentionality of others and for maintaining goal representations (e.g., posterior superior temporal sulcus, pSTS/TPJ, and the dorsomedial prefrontal cortex, dmPFC). In turn, the greater activity in these areas predicted more pronounced blame ratings of the film clips outside the scanner. Interestingly, justice sensitivity was not related to activity in areas responsible for socioemotional salience, such as orbital frontoinsula or the dorsal anterior cingulate cortex (dACC). These findings seem to be in line with the social-cognitive approach outlined above, which also emphasizes the importance of cognitive processes such as the interpretation of social situations for emotional and behavioral consequences of justice sensitivity.

9.5 Development of Justice Sensitivity

Despite the relevance of justice sensitivity for the prediction and potentially also the modification of justice-related behavior, only a little is known to date about the patterns and processes of the

development of justice sensitivity across the life span. Two studies revealed a medium-sized rank-order stability of the justice sensitivity perspectives in adults across 6 weeks (Baumert, Beierlein et al., 2014) and across 2 years (Schmitt et al., 2005). Comparisons of adult age groups showed a slight decrease in victim sensitivity and slight increases in observer, beneficiary, and perpetrator sensitivity with age (Schmitt et al., 2010).

Importantly, Bondü and Elsner (2015) validated an adapted 5-item questionnaire for the assessment of victim, observer, and perpetrator sensitivity in children and adolescents. In age groups from 9 to 17 years, rank-order stabilities across 1–2 years were somewhat lower than for adults, but still medium-sized. Comparing mean-levels across these age groups, Bondü and Elsner (2015) showed a substantial mean-level increase in victim sensitivity and a weak increase in observer and perpetrator sensitivity.

Furthermore, positive correlations of victim sensitivity and negative correlations of perpetrator sensitivity with self-reported aggression (Bondü & Krahé, 2015) and vice versa for prosocial behavior (Bondü & Elsner, 2015) support the interpretation of these justice sensitivity perspectives as involving antisocial or prosocial inclinations, respectively. Supporting and further extending the link of justice sensitivity with health outcomes revealed in adults, among children and adolescents, justice sensitivity was correlated with ADHD symptoms (Bondü & Esser, 2015) and predicted the development of emotional and behavioral problems in a longitudinal design (Bondü & Esser, 2015). Whereas victim sensitivity was associated with more severe symptoms and a deterioration of problems, for perpetrator sensitivity the opposite pattern was found. In sum, these results suggest that the psychological functions of the justice sensitivity perspectives revealed among adults also apply in children and adolescents.

Besides patterns of development of justice sensitivity, psychological mechanisms that shape development are highly important. As a potential social-cognitive mechanism of development, it has been proposed that frequently being confronted with instances of injustice may increase the activation potential of injustice-related concepts and, thus, may lead to increases in justice sensitivity across time (Baumert & Schmitt, 2009). As a short-term effect, Wijn and van den Bos (2010) found that indeed, being confronted with in/justice increased self-reported justice sensitivity. In a longitudinal study of undergraduate students across 6 months (Baumert & Maltese, 2014), there were general decreases in all justice sensitivity perspectives. This study also provided support for the assumption that frequently being confronted with injustice increases justice sensitivity in the long run. Students who reported many instances of subjective injustice from the victim or the observer perspective during their first semester showed relative increases in victim or observer sensitivity, respectively. Besides these studies on developmental processes of justice sensitivity among adults, research on the mechanisms of development in children promises to be particularly interesting. Questions about when and how the four justice sensitivity perspectives are differentiated and attenuated or boosted are still unanswered.

9.6 Conclusions and Outlook

Taken together, extensive research has revealed that justice sensitivity is a valuable construct for the description, prediction, explanation, and modification of individual differences in justice-related emotion and behavior. Justice sensitivity is nonredundant with other personality constructs, but has meaningful overlap with variables of inter- and intrapersonal functioning. It has been shown to be a strong predictor of emotion and behavior in various domains of social justice. Variance in reactions to unfairness and in the proneness to act in accordance with justice principles has been explained above and beyond the explanatory power of competing constructs. In particular, the distinction of four justice sensitivity perspectives—namely, victim, observer, beneficiary, and perpetrator sensitivity—has added considerably to the understanding of justice-related motivation. All justice sensitivity perspectives appear to reflect the individual's

concern for justice to some degree. However, observer, beneficiary, and perpetrator sensitivity seem to capture a genuine concern for justice as they are related to prosocial inclinations and foster an adherence to justice principles. Victim sensitivity seems to involve a motivational mixture—a concern for justice on the one hand and the fear of being exploited on the other—resulting in antisocial tendencies in situations involving social uncertainty, the threat of being exploited, or temptation.

Particularly with regard to the observer, beneficiary, and perpetrator perspectives, justice sensitivity can reasonably be assumed to be an indicator of individual differences in the justice motive. Due to their information processing patterns, justice-sensitive persons more readily perceive situations as justice-related, and justice concerns are more often situationally activated to guide their behavior. Furthermore, emotions resulting from the perception of injustice are more pronounced among justice-sensitive persons and motivate action in accordance with justice principles. Thus, justice sensitivity fulfills the crucial characteristics of a motive (McClelland, 1985).

As outlined in the introduction, besides justice sensitivity, belief in a just world is also considered to be an indicator of the justice motive. However, as reviewed above, empirical results have shown that the correlation between justice sensitivity and belief in a just world is very low. Moreover, these two constructs have been found to explain distinct parts of the variance in justice-related outcomes (e.g., Dalbert & Umlauft, 2009). In an attempt to reconcile these findings with the notion that both constructs indicate the strength of a justice motive, Baumert, Rothmund et al. (2013; see also Montada, 1998) emphasized that the belief in a just world is assumed to reflect a psychological need for justice as a principle of order in the world. In other words, the belief in a just world appears to capture a conditional concern for justice that leads an individual to adhere to justice standards and act in the name of justice only as long as the belief in a just world is not threatened or options for active restoration of justice are easily accessible.

By contrast, observer, beneficiary, and perpetrator sensitivity appear to capture the commitment to justice as a moral principle, thus reflecting an unconditional concern for justice. Even under conditions of temptation (Lotz et al., 2013), personal costs (e.g., Lotz et al., 2011), or the threat of being exploited (e.g., Gollwitzer et al., 2009), highly observer-, beneficiary-, or perpetrator-sensitive people have been found to adhere to justice standards and act against violations of such standards.

On a more general level, the research reviewed on justice sensitivity demonstrates that an individual difference approach is necessary for complementing general psychological approaches in research on social justice in order to fully understand this social phenomenon. Assessing systematic individual differences in the concern for justice allows researchers to explain a substantial share of variance in justice-related emotion and behavior. Moreover, research on the information processing involved in justice sensitivity exemplifies how an individual difference approach also provides a more complete understanding of psychological processes that drive reactions to potential injustice and their boundary conditions. Importantly, detailed knowledge on information processing patterns that explain individual differences in justice-related emotion and behavior allows for the design and implementation of theory-based approaches to change behavior.

With the present review, we hope to stimulate further research on justice sensitivity, its processes, and its outcomes. As emphasized above, questions remain open with regard to the social-cognitive processes underlying justice sensitivity, their similarities and distinctions across the justice sensitivity perspectives, and their causal relevance, for both situational consequences of justice sensitivity and long-term changes in this disposition. Furthermore, future research should address cross-cultural differences in justice sensitivity and its psychological functioning. Cross-cultural comparisons are particularly valuable because they can provide knowledge about the generalizability of the reviewed findings on justice sensitivity. Wu et al. (2014) provided data

comparing levels of the justice sensitivity perspectives between Chinese, Russian, and German participants and reported substantially higher levels of beneficiary sensitivity and lower levels of observer sensitivity for Chinese people. Maltese, Baumert, and Schmitt (2013) found no mean-level differences between Filippinos, Australians, and Germans. However, correlations of justice sensitivity with behavior in the trust game and accompanying cognitions and emotions differed across cultures, potentially revealing cultural differences in the meaning of the constructs. More research in this and the previously mentioned directions promises to substantially enlarge our knowledge about the processes and consequences of the justice motive and will help us to understand individual differences in the social justice domain more completely.

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Social-Cognitive and Motivational Processes Underlying the Justice Motive

10

Kees van den Bos and Michèlle Bal

When people are trying to make sense of their world, one important type of sense-making processes revolves around circumstances in which innocent people are victim to terrible crimes such as rape or violence. The insightful work by Melvin Lerner and colleagues suggests that people often make sense of these kinds of awful events by trying to compensate the victim or punish the perpetrator and, if this person is not likely to be caught, to start blaming the victim for his or her behavior. People may also evaluate the victim's personality in negative terms. In this way, people restore their belief in a just world where good things happen to good people and bad things happen to bad people only. Thus, somewhat paradoxically, a justice motive may underlie people's derogatory reactions to innocent victims (see, e.g., Lerner, 1977, 1980, 1998, 2003; Lerner & Agar, 1972; Lerner & Clayton, 2011; Lerner & Goldberg, 1999; Lerner & Lerner, 1981; Lerner & Miller, 1978; Lerner, Miller, & Holmes, 1976; Lerner & Simmons, 1966; Lerner & Whitehead, 1980).

In the current chapter, we examine some important psychological processes that may explain why the justice motive is so important to people and how this motive causes people to show derogatory reactions to innocent victims. To this end, we focus on social-cognitive processes that may affect the psychological functioning of the justice motive. The current chapter not only examines how people react to innocent victims of terrible crimes, but we also review social-cognitive processes that explain more generally how people calibrate the motive of genuine justice with more self-centered reactions. These processes also involve experiential and rationalistic processes that may differentially affect people's justice concerns. We also will study motivational processes that complement the justice motive. These motivational processes include people's desire to avoid or reduce uncertainty and other processes of motivated self-regulation. The motivational processes we review also pertain to how people deal with justice concerns in their culture, in particular the cultural context of our society that tends to emphasize obtaining outcomes that only will be available to us after some time. We close by discussing the possible relationships between the theories and findings reviewed in this chapter and other relevant theories. We also will point out unexplored conceptual issues as well as some important methodological issues pertaining to the scientific study of the justice motive.

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10.1 Social-Cognitive Processes

There is plenty of evidence showing that the justice motive is impacting people's reactions to victims of rape or other terrible crimes. For example, when a victim is more similar to the observer of the unjust event, the victim is more likely to be blamed and derogated for what happened to him or her (e.g., Aguiar, Vala, Correia, & Pereira, 2008; Correia, Vala, & Aguiar, 2007; Lodewijkx, De Kwaadsteniet, & Nijstad, 2005; Novak & Lerner, 1968). Related to this, when a perpetrator is more similar to the observer and is not caught, the victim is more likely to meet with derogatory reactions (Bal & Van den Bos, 2010). When perpetrators are not caught, derogatory reactions to innocent victims are especially more likely (e.g., Hafer, 2000a; Lerner & Miller, 1978). These effects presumably are out there because victims or perpetrators that are more similar to you pose a stronger threat to your personal world (Bal & Van den Bos, 2010; Lerner & Miller, 1978). When a perpetrator is not caught this makes justice concerns more accessible (Hafer, 2000a), as a result of which you tend to use more abstract language to describe the victim's behavior (Helder, Sutton, & Van den Bos, 2014) and you are more likely to label the behavior and personality of the victim in more negative terms.

This is not the time and the place to provide a thorough and complete review of the impressive research findings that have been obtained following Lerner's pioneering and groundbreaking work on the justice motive. Here we simply state that the justice motive is very important and that many components of Lerner's just-world theory have been supported in careful and important research studies (see, e.g., Baumert, Otto, Thomas, Bobocel, & Schmitt, 2012; Callan, Ellard, Shead, & Hodgins, 2008; Callan, Kay, Davidenko, & Ellard, 2009; Callan, Shead, & Olson, 2009; Callan, Sutton, & Dovale, 2010; Correia & Vala, 2003; Dalbert, 1997, 1999, 2001, 2002; Dalbert & Katona-Sallay, 1996; Gollwitzer, 2004; Gollwitzer & Bushman, 2012; Gollwitzer, Meder, & Schmitt, 2011; Gollwitzer, Rothmund, Alt, & Jekel, 2012; Gollwitzer, Rothmund, Pfeiffer, & Ensenbach, 2009; Gollwitzer, Schmitt, Schalke, Maes, & Baer, 2005; Hafer, 2000a, 2000b; Hafer & Bègue, 2005; Hafer, Bègue, Choma, & Dempsey, 2005; Hafer & Olson, 1993; Maes & Kals, 2002; Montada, Schmitt, & Dalbert, 1986; Schmitt, Gollwitzer, Maes, & Arbach, 2005; Schmitt, Neumann, & Montada, 1995; Schmitt, Oswald, Kim, Gillespie, & Ramsay, 2004; Sutton & Douglas, 2005; Sutton, Douglas, Wilkin, Elder, & Cole, 2008).

We further note that we work from the assumption that justice is frequently a very real concern to people and is of great motivational importance to many. So, in our examination of the psychological processes that may underlie the justice motive, we are certainly *not* suggesting that justice concerns are a myth. Quite the contrary (see, e.g., Miller, 1999; Miller & Ratner, 1998), we assume that justice is a fundamental motive and that it quite often takes priority over self-interest. That said, we do note that researchers should thoroughly study the conditions under which justice is more of a concern to people and those under which it is less important to them (Van den Bos & Lind, 2002, 2009, 2013; Van den Bos, Peters, Bobocel, & Ybema, 2006). It is to a discussion of this work that we now turn.

10.1.1 Two-Phase Model of Self-Interest and Justice Concerns

It is our explicit assumption that people are social beings who tend to care in genuine ways about fairness and justice and in essence are benign creatures who want to do the right thing (Van den Bos & Lind, 2013; Van den Bos et al., 2011). Research has supported this assumption in important ways. For example, many research studies have shown that the majority of people tend to adhere to a prosocial orientation such that they value that their own outcomes are distributed equally compared to outcomes of other people (Van den Bos et al., 2011; Van Lange, Otten, De Bruin, & Joireman, 1997; see also Rand, Greene, & Nowak, 2012; Van Lange, Agnew, Harinck, & Steemers, 1997; Van Lange & Kuhlman, 1994; Van Lange & Liebrand, 1991a, 1991b).

Van Lange, Otten et al. (1997) developed a nine-item decomposed game measure of social value orientation by means they could classify research participants as prosocial, individualistic, or competitive depending on whether the majority of their choices were consistent with one of these three social value orientations. Using this measure, several studies have found that the largest group of participants tends to be prosocial, as opposed to individualistic or competitive. For example, Van Lange, Otten et al. (1997, Study 4) observed that in a representative sample of the Dutch adult population ($N = 1728$), 71 % of the respondents could be identified as prosocials. Van Lange (1999) concluded that it is common to find in student samples that more than 50 % of the participants can be identified as prosocial. Furthermore, the prevalence of prosocials tends to be even more pronounced in the adult population in the Netherlands than in student samples in the psychology laboratory (Van Lange, Otten et al., 1997). Moreover, similar findings are obtained in the U.S. and other countries (Van Lange, Agnew et al., 1997; Van Lange & Kuhlman, 1994; Van Lange & Liebrand, 1991a, 1991b; see also Balliet, Parks, & Joireman, 2009).

Along these lines, we note that it seems reasonable to assume that many people in organizations want to do what is right (Lind & Van den Bos, 2013). In fact, people with these positive social values may constitute as much as 90 % of the general population in labor organizations (IJfs, 2012). This said, there are undoubtedly other people who are purposively looking for opportunities to cheat and to engage in fraudulent acts. This group may constitute only 2 % of a given labor organization, but it may be a very salient group, once detected, and may have detrimental effects on the organization's profits and other outcomes, in part because this 2 % can influence an additional 8 % in the organization who are inclined to follow fraudulent norms when given the opportunity (IJfs, 2012).

Of course, notwithstanding the prosocial orientation of the majority in many research samples, we are aware that some people clearly engage in selfish, exploitative, or even fraudulent behavior. Certainly, there are those with a competitive orientation who would like to outperform others, sometimes even at the expense of some of their own personal gains (Van Lange, Otten et al., 1997), and these people might be tempted to engage in anti-social and blatantly unfair and unjust behavior (Van den Bos & Lind, 2013). Furthermore, even those who are oriented toward cooperation may sometimes be oriented toward their own hedonic responses and the fulfillment of their self-interest concerns. For example, people generally do not like getting outcomes that are advantageous but inequitable in comparison to the outcomes of comparable other persons, but when responding under conditions of high cognitive load, people tend to be satisfied with getting unfair but better outcomes (Van den Bos et al., 2006).

Thus, we are definitely not denying that cheaters, frauds, and serious criminals are out there (see also Ariely, 2012). But we also note that many people, and probably even the largest group of people in several countries, are genuinely oriented toward cooperative or prosocial behavior (Rand et al., 2012). The two-phase model we put forward here, in which self-interested responses may dominate first reactions and correction for genuine fairness and justice takes place somewhat later, may explain the reactions of the majority of people (Van den Bos et al., 2011).

Research on the two-phase model thus far has focused on how people respond to outcomes that are advantageous but inequitable in comparison to the outcomes of other persons (Van den Bos et al., 2006). The model argues that one way to understand the intriguing interplay between egoism- and fairness-based considerations is to note that, when responding to advantageous inequity, judging the advantage is quick and easy as preferences are primary (Messick, 1993), whereas assessments of fairness are more complicated. Adjusting this initial, egoistic appraisal requires the investment of additional cognitive resources, as it entails integrating fairness concerns with the initial preference appraisal. This interpretation of reactions to advantageous inequity suggests a two-phase model of people's reactions, in which people's very first reaction when confronted

with advantageous inequity is one of pleasure ("Wow, I get more than someone else, that's great!"). This egoism-based, gut reaction perhaps occurs in a rather spontaneous manner that is difficult to control. We suggest that it is only after this first spontaneous reaction of pleasure that people consider the fairness of the situation ("Hey, but that's not fair!"). This latter, fairness-based reaction is not as automatic and fast as the first egoism-based reaction. People need a little time (e.g., some seconds) and a little more cognitive effort to discover, understand, and respond to the unfairness of a situation in which they are better off than others for no good reason, and this correction process can only take place when people have sufficient cognitive resources available (Van den Bos et al., 2006) and are motivated to do so (Van den Bos et al., 2011).

On the basis of these findings we propose a two-tier message: First, people's gut reaction to distributions of advantageous inequity and other issues may be driven by egocentrism such that people's reptile brain or primitive core lead them to be self-focused and to be pleased with things that are best for them (and not for others). Second, most people are benign beings who intend to do what is good and what is right (Van den Bos & Lind, 2013) and hence try to free cognitive resources that lead them to do the right thing and be oriented toward what others are getting. Thus, quite often, or perhaps even typically, most people tend to correct their self-centered inclinations to include a genuine other-oriented response with appropriate attention to what is fair and just.

Importantly, our line of reasoning certainly does not imply that preferences and pleasure are always selfish, as people sometimes may prefer or be pleased to see that persons other than themselves (such as persons in need) receive more of a valued resource than they themselves receive (e.g., Deutsch, 1975, 1985). We further note that, building on Strack and Deutsch (2004), it can be argued that both egoism-based preferences and fairness perceptions can work in parallel such that, once activated, both processes simultaneously influence people's reactions and the occurrence of social behavior. However, there might be an asymmetry such that it is more likely

that the fairness route is more easily impaired compared to the egoism route (the latter being more automatic than the former; Van den Bos et al., 2006).

It is noteworthy that our suggestion that preferences are more immediate than fairness considerations corresponds with Zajonc's (1980) position that feelings and preferences may be more primary than are thoughts and inferences (see also De Houwer, Thomas, & Bayens, 2001). We hasten to say that the exact processes underlying Zajonc's position have been disputed (for an overview of this discussion, see, e.g., Winkielman & Cacioppo, 2001) and similarly that the implications that follow from our research should be validated in future research. It is our hope that the experimental findings we reviewed here provide a new perspective on the empirical study of preferences and fairness concerns and that this may stimulate researchers to investigate the implications of this perspective.

A candidate for another process explaining people's reactions to advantageous inequity may be suggested by a study by Rivera and Tedeschi (1976). Participants in the bogus pipeline condition of this study were led to believe that a bogus apparatus could detect their true feelings by implicit muscle responses, whereas participants in a paper-and-pencil condition were not given this impression. Furthermore, in the bogus pipeline condition, dependent variables were measured by asking participants to indicate their ratings by turning a dial moving a pointer along a meter. In the paper-and-pencil condition, dependent variables were assessed using the normal paper-and-pencil procedures. Findings indicated that participants reported more happiness with advantageous inequity in the bogus pipeline condition than in the paper-and-pencil condition. Rivera and Tedeschi's account for their findings is that when paper-and-pencil procedures are used people's reactions are public, whereas when bogus pipeline procedures are used reactions are private. The authors further argue that, because people want to create positive impressions of themselves to others, they will report less happiness with advantageous inequity in public circumstances.

It should be emphasized, however, that the Rivera and Tedeschi (1976) results have been criticized (e.g., Ellard, Meindl, & Lerner, 2004), and that more recent research findings suggest that fairness is important to people even in completely private circumstances (see, e.g., Turillo, Folger, Lavelle, Umphress, & Gee, 2002). Furthermore, there are several issues that limit the validity of Rivera and Tedeschi's (1976) interpretation of their findings, such as the confound between the bogus pipeline procedure (present vs. absent) and the way in which dependent variables were assessed (dial equipment vs. paper and pencil). Moreover, it is not clear whether participants indeed perceived the paper-and-pencil conditions to be more public.

In addition, Roese and Jamieson (1993) noted in their thorough review of bogus pipeline research that when researchers wish to import the bogus pipeline procedure to their research domain in an effort to reduce impression management and social desirability effects, they should first demonstrate that some form of impression management bias indeed influences reactions in the domain of interest. Roese and Jamieson (1993) suggest that an obvious way to accomplish this would be to associate reactions in the domain of interest with responses on impression management or social desirability scales. To the best of our knowledge, there have been no equity studies that have incorporated one of these scales. If future research findings would indeed support Rivera and Tedeschi's (1976) account of the difference between public and private reactions to advantageous inequity (but see Ellard et al., 2004; Turillo et al., 2002), we would suggest that this account is congruent with the line of reasoning we have put forward here: In private circumstances, preferences may influence people's outcome evaluations more strongly than in public situations. In public (as opposed to private) circumstances, people may be more strongly motivated to incorporate fairness-based considerations to convey a positive impression of themselves to others, especially when they have enough cognitive capacity for doing so. We explicitly want to note here that both the social desirability effects suggested by the Rivera and Tedeschi (1976) study and the preferences vs. fairness considerations line of thinking presented earlier in this paper need further research, as does the relationship between these two lines of thought and the processes they suggest.

10.1.2 Rationalistic and Experiential Routes to Victim Blaming

Thus far we focused on social-cognitive processes that may impact how people calibrate their self-interest and fairness concerns, for example when responding to outcome arrangements of advantageous inequity. Some other basic cognitive processes also underlie the justice motive and how people react to innocent victims that pose a threat to their belief in a just world. These processes can be derived from cognitive-experiential self-theory (Epstein, 1985, 1994; Epstein & Pacini, 1999). Based on this theory, Van den Bos and Maas (2009) argued that people react to their environment by means of two information processing systems: an experiential system that operates according to heuristic principles and a more rationalistic system that operates through a person's understanding of logical rules of inference (cf. Epstein, 1985, 1994; Epstein & Pacini, 1999). The experiential system processes information automatically, rapidly, effortlessly, and efficiently, and it is built upon learned experiences, like the rules of deservingness that children learn during socialization. The rationalistic system, in contrast, is a deliberative, effortful, and abstract system, in which people weigh information carefully.

The distinction between experiential and rationalistic mindsets can be used to get more direct insight into the psychology of people's blaming of victims for their misfortunes (see also Van den Bos & Maas, 2012). To this end, Van den Bos and Maas (2009) asked participants to take part in several studies that ostensibly were unrelated to each other. In one of these studies either experiential or rationalistic mindsets were induced among the participants: In the experiential mindset condition, participants were asked to respond to a story on the basis of their intuitions

and gut feelings. Participants in the rationalistic mindset condition were asked to respond to the same story on the basis of careful and analytic consideration of the information given in the text. When participants thus had been put into one of the two mindsets, they participated in another study that was ostensibly unrelated to the study in which we induced their mindsets. In this new study, participants were confronted with a victim of robbery or sexual assault and we assessed the extent to which our participants blamed the victims for their misfortunes.

Based on modern dual-process models that distinguish between associative and propositional processes (e.g., Gawronski & Bodenhausen, 2006; Sloman, 1996; Smith & DeCoster, 2000; Strack & Deutsch, 2004), experiential and rationalistic mindsets can be linked to the theoretical distinction that has been made between associative and propositional processes. That is, the principles of spatio-temporal contiguity that have been argued to underlie associative processes and experiential mindsets promote the creation of associative links between the victim and the affective quality of the negative event. As the creation of such links via associative processes is largely independent of people's explicit beliefs, the contiguity between the victim and the negative event can produce negative reactions to the victim independent of people's just-world beliefs. Thus, this line of reasoning predicted that in experiential mindset conditions, the strength with which people believe in a just world or the extent to which these beliefs have been threatened would not strongly impact blaming of innocent victims.

This situation is different for rationalistic mindsets and processes of rule-based or propositional reasoning, which are characterized by principles of consistency and logical inference (Gawronski & Bodenhausen, 2006; Sloman, 1996; Smith & DeCoster, 2000; Strack & Deutsch, 2004). Specifically, learning about an innocent victim ("person X") creates a logically inconsistent system of beliefs that includes three propositions: (1) "The world is a just place;" (2) "A negative event happened to person X;" and (3) "Person X did not deserve that." This system of

beliefs is inconsistent, in that the three propositions cannot be endorsed at the same time without violating the notion of logical consistency. Thus, in order to avoid cognitive dissonance, people either have to reject one of the three propositions or find a new proposition that resolves the inconsistency (Gawronski & Strack, 2004). People who strongly endorse the first proposition (which would be the case when people have high just-world beliefs or when their just-world beliefs have been threatened strongly) can change the cognition underlying the third proposition and hence blame the victim. Moreover, if the first proposition is rejected from the outset (which would be the case when people have low just-world beliefs or when just-world beliefs are been threatened only weakly), there is no inconsistency in the first place and therefore no need to blame the victim by rejecting the third proposition. Thus, this line of reasoning argues that in rationalistic mindset conditions, people would blame innocent victims more when they believe strongly in a just world or when their beliefs in a just world had been threatened strongly.

The inconsistency-based blaming of an innocent victim resulting from propositional processes is quite different from the blaming that results from the mere linking of the victim with the negative event via associative processes. Most importantly, from this line of reasoning follows that just-world beliefs should play a significant role only for victim blaming resulting from propositional reasoning, but not for victim blaming resulting from associative processes. Thus, based on this theoretical line of reasoning, interaction effects were predicted between the mindset manipulation and measurements or manipulations of just-world concerns. That is, Van den Bos and Maas (2009) predicted that participants in the rationalistic mindset conditions would blame victims more when they believed strongly in a just world or when their beliefs in a just world had been threatened, whereas there was no expectation of strong effects of the measure or manipulation of just-world endorsement in the experiential conditions.

The two experiments that were presented in the Van den Bos and Maas (2009) article indeed

showed that especially when people have adopted rationalistic mindsets that individual differences and situational fluctuations pertaining to the endorsement of the just-world belief yield strong effects on blaming of innocent victims. That is, people in rationalistic mindsets blamed victims more strongly when they were strongly predisposed to endorse the belief in a just world. In contrast, in experiential mindsets victim blaming did not vary as a function of the strength of this endorsement. The findings also showed that people in rationalistic mindsets blamed victims more when their just-world beliefs had been strongly as opposed to weakly threatened. In experiential mindsets, victim blaming did not vary as a function of the strength of just-world threats.

These findings are in accordance with the hypothesized linkage between experiential and rationalistic mindsets and associative and propositional processes and support a longstanding (but thus far untested) suspicion that there may be two paths to victim blaming, an intuitive-experiential one and rational-cognitive one. To the degree that experiential mindsets increase the reliance on associative knowledge structures and rationalistic mindsets increase the reliance on consistency principles and logical inference (Gawronski & Bodenhausen, 2006; Sloman, 1996; Smith & DeCoster, 2000; Strack & Deutsch, 2004), the distinction between associative and propositional processes provides a strong a priori explanation why experiential and rationalistic mindsets produce different outcomes. That is, victim blaming under experiential and rationalistic mindsets are the result of very different evaluation processes, such that victim blaming in experiential mindsets is due to the associative process of linking the victim to the negative event, whereas victim blaming under rationalistic mindsets is due to propositional processes of logical inference and reduction of cognitive inconsistency.

One of the reasons why we think that these findings may be important is because they can be contrasted with an alternative prediction. That is, given the strong emphasis on intuitive processes in theories of moral reasoning (e.g., Haidt, 2001), one could also expect the opposite finding, namely that just-world beliefs and just-world threats moderate victim blaming under experiential mindsets but not under rationalistic mindsets. This alternative prediction would be in line with Lerner and Goldberg's (1999) emphasis on belief in a just-world effects being especially strong when people are in experiential mindsets (see also Lerner, 1998). That is, these authors emphasize the important role that intuitive-experiential mindsets play in people's blaming reactions. As stated by Lerner and Goldberg (1999): "It should be no surprise to find that people who care deeply about justice experience strong emotions when confronted with a victim. The important dynamics underlying those emotions should take place in the experiential system and involve implicit cognitions, such as the moral intuitions concerning what is just and good" (p. 631).

Thus, we think that the Van den Bos and Maas (2009) results are also important because based on the notion that experiential processes may be driving just-world effects (Lerner, 1998; Lerner & Goldberg, 1999), one could also argue that endorsement of just-world beliefs should moderate victim blaming under experiential mindsets, but not under rationalistic mindsets. However, this was not the interaction effect that was obtained in the 2009 studies by Van den Bos and Maas. This noted, Van den Bos and Maas (2009) did find a main effect of the mindset manipulation in their first experiment such that experiential mindsets let to more victim blaming than rationalistic mindsets. This effect was observed in only one of the studies though and thus should be treated with caution. However, in the same experiment Van den Bos and Maas did observe that when participants believed in a just world relatively weakly, they blamed the victims more for their misfortunes when in experiential as opposed to rationalistic mindsets. Related to this, in their second experiment it was found that when just-world beliefs had only been threatened weakly, participants in experiential mindsets blamed victims more than participants in rationalistic mindsets did. Thus, these findings show some evidence for experiential effects on victim blaming, especially when endorsement of just-world belief was relatively low (as a result of individual predisposition or experimental manipulation).

In our opinion, experiential processes may be an important determinant of justice-related reactions (see also Maas & Van den Bos, 2009; Van den Bos & Lind, 2009; Van den Bos & Maas, 2012), but our assumption is that this is more likely to be the case for justice-related reactions that are easier to process (such as reactions to voice vs. no-voice procedures or other fair vs. unfair procedures) than reactions that involve much more information (such as responses to events where innocent people fell victim to terrible crimes caused by a perpetrator who has not been caught). In correspondence with this assumption, the findings of the Van den Bos and Maas (2009) paper suggest that one type of reactions that are affected by experiential processes is victim blaming among people who are only weakly concerned with justice concerns (and who hence probably process justice-related information in more superficial ways than those concerned strongly with justice concerns). Furthermore, other recently obtained findings suggest that experiential mindsets may also influence self-oriented affective responses to fair and unfair procedures that people have experienced themselves (Maas & Van den Bos, 2009), and it has been suggested that these responses may have a more heuristic quality than more cold-cognitive justice judgments (Van den Bos, 2007; Van den Bos, Lind, Vermunt, & Wilke, 1997). Reactions to innocent victims normally may involve more consistency-based reasoning (and hence more systematic information processing) than people engage in when they experientially blame innocent victims. More research is needed to test this assumption as well as to examine in detail all the implications this line of reasoning may have for intuitive and rationalistic perspectives on moral reasoning (see, e.g., Beauchamp, 2001; Haidt, 2001, 2003; Pizarro & Bloom, 2003), earlier studies on rationalistic and experiential processes pertaining to blame and cultural worldview defense (see, e.g., Alicke, 2000; Hirschberger, 2006; Simon et al., 1997), and possible differences and similarities between procedural justice and belief in a just-world effects (see, e.g., Hafer & Bègue, 2005; Lerner & Whitehead, 1980; Maas & Van den Bos, 2009; Van den Bos & Maas, 2009).

10.2 Motivational Processes

Besides social-cognitive processes, motivational factors also impact people's desire for justice, how they form justice judgments, and how they respond to fair and unfair events. Earlier reviews described this line of reasoning in detail (see, e.g., Van den Bos, 2009a, 2009b, in press; Van den Bos & Lind, 2002, 2009, 2013; Van den Bos & Maas, 2012). These reviews focused on the relationship between the uncertain self and how people respond to fair and unfair events. The general message that can be derived from this work is that perceived fairness has special qualities for people who are trying to cope with experiences of uncertainty or other alarming events that instigate motivated self-regulatory responses. That is, when people are confronted with events such as economic problems, reorganization processes, potential lay-offs (Brockner, 2010), and also more general personal uncertainty-provoking experiences (Van den Bos, 2001), this signals to them that something potentially alarming may be going on that warrants their attention (Van den Bos et al., 2008). As a result, the individuals involved are likely to engage in sense-making and social appraisal processes in order to make sense of what is going on and what they should expect will be happening (Van den Bos & Lind, 2013). Processes related to uncertainty management and self-regulation thus seem to be involved in the formation of justice judgments, how people use these judgments, and what function these judgments play in people's desire for justice. It is to a brief review of current work on the issues of uncertainty management and self-regulation that we now turn.

10.2.1 Future Orientation and Managing Personal Uncertainty

When trying to understand why uncertainty frequently has strong effects on people's reactions, it is interesting to note that most humans nowadays live in delayed-return cultures in which future rewards often are delayed (Martin, 1999). In these cultures, an important issue is how

people deal with these and other uncertainties (Bal & Van den Bos, 2012).

According to Woodburn (1982a, 1982b, 1988; see also Feit, 1994; Testart, 1982), the large majority of people nowadays live in cultures that are composed of various sorts of societal agreements and social arrangements that ask individuals to put in effort that may or may not pay off in the long run. A good example is the raising and educating of children in modern societies. Lerner (e.g., 1977) has argued convincingly that a lot of socialization processes can be characterized by parents, teachers, and other adults informing children how to behave such that they are "a good boy" or "a good girl." These behaviors range from toilet training (with very young children), to social skills ("play nice with the other kids"), writing and math skills ("getting a good education will get you somewhere in this world and thus it is somehow important to learn how to solve logarithm problems"), and listening carefully to your coach during soccer practice. The idea is that grown-ups inform children what is the appropriate way of how to behave, with the implicit or not so implicit message that when the child conforms to these rules, the adult or role model (parent, teacher, sport coach, etc.) will value the child, and as a result, the child will be rewarded in the long run. These rewards can be both material and social, and they come in different sorts, such as getting ice cream for desert, praise from the teacher, or being awarded a place in the starting lineup of the soccer team. In other words, children are assured that if they perform certain behaviors or adopt certain values, they will receive a positive outcome later in life—an outcome that may or may not be realized. In the delayed-return cultures in which we are living (Woodburn, 1982a, 1982b, 1988), we engage in immediate effort for payoffs that are delayed and whose occurrence depends on the maintenance of specific social arrangements (e.g., your society will still value individuals who can solve logarithm problems).

Thus, in delayed-return societies there is often a delay between the efforts individuals exert and the feedback they receive regarding the outcome of their efforts. As a result, individuals may frequently experience periods of uncertainty between their efforts and their payoff, and they may find at the end of these periods that their efforts did not pay off. By that time, it may be too late for them to switch to an alternate strategy. This leads individuals in delayed-return societies to focus more on the past ("did I invest enough?") and the future ("will I obtain the results I desire?") than people in immediate-return cultures (Meillassoux, 1973; Turnbull, 1962; Woodburn, 1988). Similarly, in contexts in which delayed returns are more emphasized or more salient, past and future orientation will be more important (relative to contexts in which people are better able to live in the "here and now").

From the analysis we have presented here follows that an important aspect of how people live their lives in delayed-return cultures has to do with the issue of how they deal with the uncertainties they encounter in their lives and in their cultures (Van den Bos, 2009a). How do individuals in delayed-return societies cope with the uncertainties and delays presented to them by their culture? We argue that people have developed mechanisms designed to give them confidence that their efforts will pay off. These include such things as formal long-term binding commitments (such as marriage) and adherence to cultural worldviews and ideologies that justify their efforts. These worldviews comprise of (but are not restricted to) the protestant or puritan work ethic (Weber, 1958) and the belief that the world is a just place where bad things only happen to bad people (Lerner, 1977, 1980).

The work ethic idea by Weber (1958) is a social mechanism that demands the cooperation of specific others. Unless both individuals in a social commitment hold up their end of the deal, there is likely to be no payoff to the efforts of one or both parties. Moreover, the motivation to uphold one's end of a deal is strengthened in delayed-return societies by the societal sanctioning of a power hierarchy. Individuals in delayed-return societies have explicit laws and give certain members of the society (e.g., the police) the power to enforce those laws.

With regard to the belief in a just world, theorizing and research suggest that the need to believe in a just world develops when children

begin to understand the benefits of foregoing their immediate gratifications for more desirable, long-term outcomes. Evidence for delayed-return aspects of the just-world hypothesis comes from research by Hafer (2000b) who revealed that the more one focuses on long-term goals, the more essential is the belief in a just world and the more one will work at maintaining this belief when it is threatened. As predicted, strong long-term focus participants reacted more negatively toward an innocent victim (as opposed to a victim who was not innocent), presumably to maintain the belief that the world is a just place where good things happen to good people and bad things to bad people. Hafer also showed that the more one focuses on long-term investments, the stronger one's belief in the just world (see also Hafer et al., 2005). Related to this, Callan, Shead, and Olson (2009) revealed that an extant just-world threat may induce a desire for smaller, immediate rewards at the expense of larger, delayed rewards.

Building on this line of reasoning, Bal and Van den Bos (2012) argued that motivational processes underlying responses to just-world threats typically take place in contexts where people are dealing with issues of personal uncertainty in delayed-return contexts. More specifically, we proposed that a focus on the future enhances intolerance of personal uncertainty. People often have to invest time, money, and energy now in order to obtain a reward later. And while several influential social psychological theories focus on the importance and benefits of delaying gratification and striving for long-term goals (e.g., Metcalfe & Mischel, 1999; Muraven, Tice, & Baumeister, 1998), delayed rewards are often uncertain, which could lead to feelings of personal uncertainty or self-doubt (Van den Bos, 2009a). Therefore, we expect that a strong future orientation can make people more intolerant of these feelings of personal uncertainty.

According to the uncertainty management model (Van den Bos, 2001, 2009a, 2009b; Van den Bos & Lind, 2002, 2009), personal uncertainty is defined as a subjective sense of doubt or instability in self-views, worldviews, or the interrelation between the two (Van den Bos, 2009a).

The model proposes that people develop and adhere to cultural worldviews to be able to tolerate this uncertainty. Building and extending on these insights, Bal and Van den Bos (2012) argued that in order to tolerate the personal uncertainty associated with adopting a future orientation, people may adhere to the belief in a just world more strongly. In other words, we suggested that one way of dealing with intolerance of personal uncertainty associated with focusing on the future is adhering to the belief in a just world more strongly and thus react more negatively toward innocent victims. Combining these ideas we proposed and showed that intolerance of personal uncertainty associated with a future orientation underlies negative reactions toward innocent victims.

10.2.2 Self-Regulation and the Justice Motive

Partly based on the above-mentioned reviews, we would like to suggest that dealing with threats to people's just-world beliefs constitutes a motivated self-regulation process. Loseman and Van den Bos (2012) argued that an implication of this assumption is that when self-regulation is impaired, the aversive threat experience will continue, making it more likely that people are inclined to regulate the threat by blaming and derogating an innocent victim. In contrast, when self-regulation is facilitated, chances are higher that the threat will be regulated more easily, which removes the urge to blame and derogate the victim. Loseman and Van den Bos tested these predictions in studies that examined the influence of impairment and facilitation of self-regulation on how people deal with just-world threats.

In their 2012 article, Loseman and Van den Bos noted that processes of self-regulation need self-regulation resources (Baumeister, Bratlavsky, Muraven, & Tice, 1998). This implies that shortcomings in the availability of these resources lead to the insufficient functioning of motivated self-regulation processes. The state in which self-regulation resources are depleted is known as

ego-depletion (Baumeister et al., 1998). Research on ego-depletion typically tests the effect of performing one self-regulation task on performance of any subsequent task that involves self-regulation (e.g., Vohs, Baumeister, & Ciarocco, 2005). This effect entails that ego-depletion (by means of an earlier self-regulation task) impairs following processes of self-regulation.

Loseman and Van den Bos (2012) further argued that the effect of ego-depletion can be counteracted by intervention strategies (Schmeichel & Vohs, 2009). One such psychological intervention is self-affirmation, basically the enhancement of the perceived integrity of the self (Koole, Smeets, Van Knippenberg, & Dijksterhuis, 1999; Schmeichel & Vohs, 2009; Steele, 1988). Self-affirmation has been shown to facilitate self-regulation in a whole range of different settings, like in cases of rumination (Koole et al., 1999), the challenge of one's beliefs (Cohen, Aronson, & Steele, 2000), threatening health messages (Sherman, Nelson, & Steele, 2000), and mortality threat (Schmeichel & Martens, 2005). Therefore, both self-affirmation and ego-depletion seem to be appropriate factors when examining self-regulation processes of dealing with just-world threats.

Annemarie Loseman and Kees van den Bos tested the above-mentioned predictions in two studies. In accordance with research on ego-depletion (e.g., Gailliot, Schmeichel, & Baumeister, 2006) and self-affirmation (e.g., Schmeichel & Vohs, 2009), the two studies focused on different parts of the self-regulation process. In Study 1, ego-depletion was induced before participants received threatening information that posed a strong (vs. weak) threat to their belief that the world is a just place. In Study 2, self-affirmation was induced after participants received the information that strongly (vs. weakly) threatened their just-world beliefs. Study 2 was conducted using a student sample and Study 1 was run in a non-student population. In both studies participants were confronted with a reported event of an innocent young woman who fell victim of a rape crime, which generally entails a threat to the idea that in this world everybody gets what he or she deserves.

Findings of the two studies supported the self-regulatory function of the justice motive. That is, as predicted, Study 1 showed that when self-regulation resources were depleted, participants blamed the innocent victim more for her ill fate when the situation constituted a stronger just-world threat (i.e., the perpetrator had not been caught) compared to when this threat was weaker (i.e., the perpetrator had been caught). Study 2 revealed that self-affirmation—known for facilitating self-regulation—caused the blaming of innocent victims to attenuate, leading participants not to blame the victim more when the just-world threat was higher.

Taken together, these findings suggest that coping with just-world threats involves self-regulatory processes leading to more or less defensive reactions (like blaming innocent victims). When people's self-regulatory resources are depleted, they react more negatively to innocent victims when they constitute a stronger threat to the belief that the world is a just place. Facilitating self-regulation, by means of self-affirmation, enables people to cope with just-world threats, thereby inhibiting the urge to blame innocent victims. Thus, these results support the idea of a self-regulation basis of coping with just-world threats as evidenced in both the impairment of self-regulation caused by ego-depletion and the facilitating role of self-affirmation (Loseman & Van den Bos, 2012).

Future research is needed to examine all the ins and outs of our hypothesis that self-regulatory processes underlie important effects that are reported in the extensive literature on people's belief in a just world. In addition, research findings may yield more nuanced insights into the functioning of the justice motive and the justice judgment process than depicted thus far in this chapter. For example, Van Prooijen and Van den Bos (2009) found some evidence that it is especially social (not individual) aspects of people's self-construal that can make innocent victims particularly threatening to just-world beliefs. This would be the case because social self-construal emphasizes the fact that similar others are vulnerable to uncontrollable harm, which reminds observers of the unpredictability of their own

fates. Instead of speculating about these issues in more depth than seems warranted, we now turn to our conclusions and a discussion of some issues pertaining to research methodology when studying the justice motive.

10.3   Discussion

In the current chapter, we examined psychological processes that may underlie people's justice concerns. The psychological processes we focused on included both social-cognitive and motivational processes. In particular, we discussed a two-phase model of self-interest and justice concerns, rationalistic and experiential paths to blaming of innocent victims and their relationship with explicit just-world beliefs, future orientation and coping with personal uncertainty, and self-regulatory processes pertaining to the just-world motive.

Future research is needed to examine all the ins and outs of all the findings we discussed, including the robustness of the findings and how to operationalize dependent and independent variables (see, e.g., Van den Bos & Lind, 2013). For example, although we often find blaming and derogation of innocent victims, it frequently turns out to be quite difficult to obtain these effect in our lab or when testing our hypotheses in a non-student population (Bartelds, 2013), also when we include vivid and involving stimulus materials (Killaars, 2013). In fact, it is our impression that just-world effects are primarily found in reliable ways when participants respond to deeply involving stimulus materials in which they witness terrible crimes such as innocent victims being raped or sexually abused and not when participants witness somewhat "less awful" events such as someone being beaten up or being robbed.

This impression fits with a plea by Lerner (2003) to study the just-world hypothesis only by using emotionally involving stimuli. In contrast to Lerner (2003), however, it is our working hypothesis that our observation of sometimes non-robust just-world effects may suggest important boundary conditions before people's just-

world beliefs are threatened strongly enough to lead people to want to restore their belief that the world is just by blaming and derogating innocent victims for what happened to them. We are also putting forward this hypothesis (which can be tested systematically in future research) because rationalistic and experiential processes seem to affect the functioning of the justice motive in different ways than Lerner (2003) envisioned (Van den Bos & Maas, 2009, 2012). This does not imply that the justice motive would be a weak motive only, not at all. But it does suggest that it may not be that easy to get people to blame and derogate innocent victims. Partly in response to these issues, our work in progress currently also focuses on the more positive and empathic reactions to innocent victims that people may also show in robust and reliable ways (see, e.g., Bal & Van den Bos, 2014a, 2014b; Stel, Van den Bos, & Bal, 2012; Stel, Van den Bos, Sim, & Rispens, 2013). We are also studying these more positive reactions to victims because these reactions tend to be somewhat understudied in just-world research.

We are raising the issue of the robustness of effects studied because we think that more attention to appropriate specific details of research studies would make the justice literature even stronger than it already is. This is also an important reason why we included relevant details of the studies we reviewed here. We did this in the hope that this would increase insight into the psychology of the justice motive (and related processes) and that this, in turn, would yield a more robust and even more exciting psychological science of justice concerns.

For instance, we noted explicitly that the two-phase model of people's self-interested and justice responses has been tested thus far mainly in the context of reactions to advantageous inequity (Van den Bos et al., 2006). We think it is important to be aware that certain fine-grained psychological processes can best be studied by examining well-defined stimuli. Therefore, we stated that outcome arrangements of advantageous inequity may be better suited to study the conflict between self-interest and justice concerns than many other stimuli often studied in the

justice literature (Peters, Van den Bos, & Karremans, 2008). Researchers would do well to pay appropriate attention to these kinds of methodological specifics when developing their research designs.

Related to this, we examined different conceptual models in this chapter. These models may be related to some extent to each other, but also differ in important ways and have different explanatory value for different types of human reactions. For instance, the two-phase model of how people respond to advantageous inequity (Van den Bos et al., 2006) and the dual-path model to victim derogation (Van den Bos & Maas, 2009) focus on human responses that are clearly different from each other. In our view, it would be best to adopt an integrative view on different theoretical perspectives and to try to integrate these perspectives when one can, but at the same time, one should not equate theories or studies that focus on outcome satisfaction as a main dependent variable (e.g., Van den Bos et al., 2006) with those that concentrate on victim blaming and victim derogation (e.g., Van den Bos & Maas, 2009). Similarly, conceptual frameworks of reflective and impulsive determinants of social behavior (e.g., Strack & Deutsch, 2004) are related, yet are clearly not the same as models that focus on experiential and rationalistic processes (e.g., Epstein, 1985). In other words, not only "the devil is in the detail" (as the proverb goes), but appropriate attention to conceptual and methodological details is also needed for advanced theoretical and empirical progress in the area of the psychology of justice judgments.

The process-oriented study of justice concerns can also profit from other cognitive processes and motives underlying justice which we did not examine in full detail in this chapter. For example, with regards to motives, important work has been done on how belongingness and social identity motives relate to procedural justice (e.g., Huo, Smith, Tyler, & Lind, 1996; Lind & Tyler, 1988; Tyler, 2006; Tyler & Lind, 1992) as well as distributive justice (e.g., Wenzel, 2000, 2001, 2002, 2004). With respect to cognitive influences, recent work reveals how different dispositions in victim sensitivity may affect the processing of unjust and just information (e.g., Baumert et al., 2012). This and other additional work clearly is relevant and important for a better understanding of the cognitive and motivational processes relevant to justice judgments and justice concerns.

The current chapter not only examined people's reactions to innocent victims (an issue on which most just-world research focuses), but also reviewed theories and findings that examine more generally how people calibrate genuine concerns for justice with self-interested responses. In this way, the chapter aimed to integrate just-world research with the broader literature on the social psychology of justice judgments and justice concerns. In studying these issues, a central proposition formulated in this chapter is that social-cognitive and motivational processes underlying people's reactions to innocent victims make up pivotal parts of what makes us human and play a crucial role in how we use justice judgments in our daily lives. In some way, one might say that the psychological processes that we study here move beyond the more traditional view of just-world theory. We are not entirely sure whether this interpretation of our findings would be warranted. In contrast, how we see it is that the research that we reviewed here is inspired by the groundbreaking work on the justice motive by Lerner and others. And by examining the psychological processes we focus on in this chapter, we hope to contribute a bit to what we see as the process-oriented grounding of the psychology of the justice motive.

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Distributive Justice

11

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11.1 Introduction

Humans form ideas of fairness, and they assess the fairness or unfairness of the rewards that they and others receive. These ideas and assessments set in motion a large train of behavioral and social consequences, at all levels of analysis, from allocation and voting decisions to participation in strikes and revolutions, from theft and grief to marital cohesion and social cohesion. They occur in groups of all sizes, from dyads to the entire world, and they involve both groups and subgroups.

The pervasiveness and intensity of justice assessments and sentiments has generated great writings—in philosophy, theology, literature, and, for more than 200 years, social science. Extraordinary words echo across the centuries: "Justice is equality" (Plato); "Justice is the bond of men in states" (Aristotle); "Without justice, what are kingdoms but giant robberies" (Augustine);

"Without justice, not even a band of thieves could live together" (Cervantes); "Nature began the injustice by the highly unequal way in which she endows individuals physically and mentally, for which there is no help" (Freud, 1952).

The road from ideas to reliable scientific knowledge takes many turns. This chapter provides a flavor for that road, the Justice Road. We begin with the briefest overview of the current understandings, then step back to see the Road that brought us here, finally press ahead to new theoretical and empirical outposts.

11.2 The Justice Road

11.2.1 Current Understandings

In the world of distributive justice there are three key actors—

- Allocator
- Observer
- Rewardee

and four key terms—

- Actual Reward
- Just Reward
- Justice Evaluation
- Justice Consequences

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Fig. 11.1 The world of
distributive justice
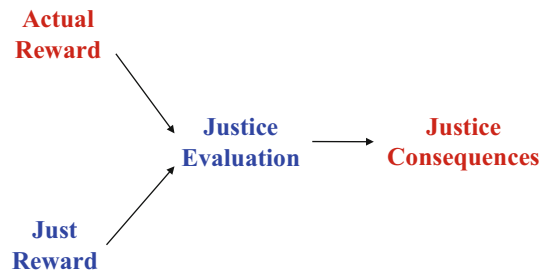
The Observer forms ideas of the Just Reward
for the Rewardee. The Allocator assigns the Actual
Reward to the Rewardee. The Observer assesses
the justice or injustice of the Actual Reward
received by the Rewardee, generating the Justice
Evaluation. The Observer's Justice Evaluation trig-
gers the Justice Consequences. In a justice situa-
tion, a person may play one, or two, or all three
parts. For example, a given person may be only
Observer or only Rewardee or only Allocator, or
may be both Observer and Rewardee, or may be all
three. To illustrate, a person who is both Allocator
and Observer forms ideas of the Just Reward and
uses those ideas to assign the Actual Reward, albeit
in concert with other, non-justice, ideas. However,
a non-Observer Allocator assigns the Actual
Reward without benefit of justice ideas.

For simplicity, the three key actors are
described as if "person" refers only to natural
persons. But, of course, all three can be corporate
persons. For example, the Rewardee may be a
social entity, such as a club or a country. Similarly,
the Allocator and the Observer may also be cor-
porate persons; examples include universities
allocating funds to campus extracurricular orga-
nizations and foundations allocating funds to
nongovernmental organizations, and both form-
ing ideas about the Just Reward.

The theoretical heart of distributive justice
involves the relations among the four terms and
their determinants and consequences. Figure 11.1
provides a starting view. The Observer compares
the Actual Reward to the Just Reward and thereby
generates the Justice Evaluation, which then sets
in motion the Justice Consequences. The Justice
Evaluation is the bridge that connects the Just
Reward and the Justice Consequences – and the
two great literatures associated with them.

Special theories provide descriptions of the
process by which the Observer forms ideas of the
Just Reward, the process by which the Allocator
assigns the Actual Reward, and the process by
which the Justice Evaluation leads to the Justice
Consequences. These processes involve additional
terms, notably Rewardee characteristics, Observer
characteristics, Allocator characteristics, together
with Reward characteristics and characteristics of
the social and temporal context. Some of the addi-
tional terms combine to form (1) the allocation
rules that guide the Allocator in assigning the
Actual Reward and (2) the justice principles that
guide the Observer in forming the Just Reward.

Thus, the processes leading to the Actual Reward
and the Justice Consequences may involve a variety
of considerations. For example, when assigning the
Actual Reward, the Allocator reflects on Rewardee
characteristics, as does the Observer, when forming
ideas of the Just Reward; however, there may be
other inputs to the Actual Reward and the Just
Reward besides Rewardee characteristics. The
inputs to the Actual Reward and the inputs to the Just
Reward may overlap, but they are not identical.
Accordingly, Fig. 11.1 embeds the three key
actors—Allocator, Observer, Rewardee—and the
four key terms—Actual Reward, Just Reward,
Justice Evaluation, and Justice Consequences—
in four basic processes:

1. *Actual Reward Process*. The Allocator, guided
   by allocation rules, uses Rewardee character-
   istics and other inputs to generate the Actual
   Reward for the Rewardee.
2. *Just Reward Process*. The Observer, guided
   by justice principles, uses Rewardee charac-
   teristics and other inputs to generate the Just
   Reward for the Rewardee.

3. *Justice Evaluation Process*. The Observer compares the Actual Reward to the Just Reward, generating the Justice Evaluation.

4. *Justice Consequences Process*. The Justice Evaluation triggers a long train of Justice Consequences, possibly incorporating non-justice factors—stretching out to all domains of human behavior and the social life and giving justice the character of a basic sociobehavioral force.

The challenge in the study of distributive justice is to achieve reliable knowledge about these processes. Importantly, they may be Allocator-specific, Observer-specific, and/or Rewardee-specific, and they may be Reward-specific and/or shaped by the sociotemporal context, thus requiring careful theoretical and empirical analysis.[1]

11.2.2 Travels on the Justice Road: Before the Twentieth Century

The Actual Reward was the first to appear. Of course, it was a plain reward, unadorned by "Actual," which would not be necessary until the idea arose of the Just Reward. The reward could be anything, both the natural goods like beauty and musical talent and the social goods like material possessions. Moreover, the idea of reward encompassed not only goods but also bads, like taxes and punishments. There were rules for minimum and maximum wages, and algorithms for a wide variety of rewards, including prize money for capturing enemy ships.[2]

The Just Reward became the bedrock of distributive justice, illuminating not only the amount (as in the homilies of St. Antoninus on the just wage) but also matters of timing ("Pay them their wage each day before sunset" [Deuteronomy 24:14]) and extending to the distribution of all material things and even to the natural goods (like beauty).

The inputs to the Just Reward, especially Rewardee characteristics, were abstracted into principles of justice—also called norms of justice or values of justice. Three foundational principles of justice were introduced: equality, need, and merit. The literature is rich with discussions of these principles, their interpretation, and conflicts between them, and rich as well in memorable words, such as the Marx-Blanc-Morelly (Marx, 1875/1959) or koinonial (*Acts* 2:44–45, 4:34–35) prescription: "From each according to his ability, to each according to his need."

The process by which the Observer forms ideas of the Just Reward is multiform. In the end, all that matters is the Just Reward. But the Just Reward may arise in many ways. It may be generated by the Rewardee's characteristics, as discussed above, the Observer calculating the just returns to personal characteristics (guided by considerations of need and merit and their observable indicators). But it may also be generated by the Rewardee's previous Actual Reward, by another's Actual Reward, or, more deeply, by a parameter (such as the mean or median) of the distribution of Actual Rewards among a group or subgroup.

It was understood from the start that discrepancies between the Actual Reward and the Just Reward lead to a large variety of Justice Consequences. Consider, for example, Epictetus' prescriptive principle: "Do not seek to have events happen as you want them to, but instead want them to happen as they do happen, and your life will go well" (Epictetus, *Handbook*, Counsel 8, 1983). Many stories provide vivid illustration, such as the story of Cain and Abel and the story of Snow White's stepmother. But key aspects remained shrouded in mystery. Clarity would come with understanding of the determinants of the Just Reward and understanding of the Justice Evaluation.

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[1] The four processes describe the operations and activities highlighted in the list of four central questions compiled by Jasso and Wegener (1997), which integrated two earlier rival lists of three questions each (Jasso, 1978, p. 1400; Wegener and Steinmann, 1995).

[2] For example, naval prize money plays a prominent part in Jane Austen's novel *Persuasion*, set in 1814–1815. The rules for dividing the prize money among a British ship's personnel at the time of the Napoleonic Wars were based on the Cruisers and Convoys Act of 1708, described in Lavery (1989).

In the story of Cain and Abel, the Allocator gives different rewards to the two brothers, Cain forms the idea of the Just Reward for self based on Abel's Actual Reward, compares (as Observer) own Actual Reward to own Just Reward, and as a result kills Abel. In the Snow White story, Snow White's stepmother sets the Just Reward for self equal to the top rank in the beauty hierarchy; when Snow White replaces her stepmother in the top rank, the stepmother compares her Actual Reward (second rank) to her Just Reward (top rank), and as a result orders Snow White's death.

The path to the Justice Evaluation in the Justice Road achieves new sharpness with Marx and William James. In "Wage Labour and Capital," a treatise based on lectures delivered in December 1847, Marx (1849/1968, p. 84) begins with the celebrated thought-experiment on the hut and the palace:

> A house may be large or small; as long as the surrounding houses are equally small it satisfies all social demands for a dwelling. But let a palace arise beside the little house, and it shrinks from a little house to a hut … the occupant of the relatively small house will feel more and more uncomfortable, dissatisfied and cramped within its four walls.

In the *Principles of Psychology*, James (1891/1952, p. 200) analyzes the individual's production of self-esteem:

> [Our self-feeling] is determined by the ratio of our actualities to our supposed potentialities; a fraction of which our pretensions are the denominator and the numerator our success; thus, Self-esteem = Success/Pretensions. Such a fraction may be increased as well by diminishing the denominator as by increasing the numerator. To give up pretensions is as blessed a relief as to get them gratified….

The Marx and James passages encapsulate two key advances along the Justice Road. First, Marx's hut and palace morph into the Actual Reward and the Just Reward, respectively, as do James' success and pretensions. Second, comparison of the hut to the palace, like comparison of success to pretensions, yields the Justice Evaluation and its kindred outcomes, like self-esteem and relative deprivation.

11.2.3 Travels on the Justice Road: The Twentieth Century

As the social sciences advanced in the quest for reliable knowledge about human behavioral and social phenomena, a variety of ideas, insights, and theoretical accounts emerged to sharpen understanding of distributive justice. Here we focus on a few of them, arranged thematically.

The Three Actors. The Rewardee was inherited fully formed. But developments of the twentieth century cast new light on Allocator and Observer. The Allocator became a key actor in the work of Lerner (1975, 1980), Leventhal (1976), and Blalock (1991). Meanwhile, the Observer became pivotal in Austin and Walster (1975, pp. 478–494) and Jasso (1978, p. 1400). The actors may be corporate persons as well as natural persons (Jasso & Wegener, 1997).

Rewards. As the social sciences blossomed in the twentieth century, it became clear that rewards are endemic to the social sciences, and pivotal to distributive justice. As Actual Reward, they are the "what" of "who gets what, and why" in the study of social stratification across a wide swath of disciplines. Similarly, as Just Reward, they are the "what" of "who should get what, and why" in the study of distributive justice, also across a wide swath of disciplines. When the Rewardee is a corporate person, the Reward may be a group characteristic or property such as average income or income inequality.

Rewards—Properties. The twentieth century saw new interest in the wide variety of rewards, reward domains, classifications of rewards, and properties of rewards. Notable contributions are found in the work of Adams (1963), Blalock (1991), Blau (1964), Deutsch (1975, 1985), Foa (1971), Goode (1978), Homans (1961, 1974), and Jencks et al. (1972). For example, Adams (1963, p. 423), restricting attention to the workplace, lists such rewards as pay, fringe benefits, type of office furnishings, type of parking space, and so on. Importantly, some rewards are inputs to other rewards—examples include schooling

and earnings. Rewards also differ widely in their measurement properties, some cardinal (like pay), some ordinal (like beauty or skill), and some qualitative (like a smile, hair color, or a request for advice).

Rewards—Properties—Goods and Bads. While modern treatments of distributive justice cover both goods and bads, implicitly or explicitly (Berger, Zelditch, Anderson, & Cohen, 1972, p. 128), systematic research has been less common on bads than on goods. Two pioneering lines of research on bads are the Törnblom line (Sabbagh & Schmitt, 1998; Törnblom, 1988; Törnblom & Jonsson, 1985, 1987) and the Rossi line (Hagan, Ferrales, & Jasso, 2008; Rossi & Berk, 1997; Rossi, Simpson, & Miller, 1985).

Determinants of the Actual Reward. Importantly, the inputs to the Actual Reward may involve a variety of elements and reasonings. At least since Leventhal (1976) it has been understood that many considerations beyond justice may guide the Allocator. These elements, reasonings, and considerations combine to form the allocation rules. Moreover, the process by which the Allocator generates the Actual Reward may depend systematically not only on Rewardee characteristics but also on Allocator characteristics, Reward characteristics, and the sociotemporal context.

Allocation rules, like rewards, command wide attention in the social sciences. They may be thought of, roughly, as the "why" in "who gets what, and why"—showing how inputs are converted into the Actual Reward. Allocation contexts run the gamut from situations constrained by rigid rules set in advance to situations in which individual Allocators have wide, possibly total, discretion. To illustrate, employers may be subject to pay scales or relatively free in setting wages. Consider two contrasting examples—pay in the military and in baseball. Military pay in the United States is set legislatively and is well known; pay charts can be consulted on the Internet. A college graduate commissioned as an entry-level second lieutenant in the Army or Air Force in 2015 earns, annually, $35,211.60 in basic pay, plus nontaxable allowances for meals ($2,954.88) and housing (which vary by residence in government quarters and by location), plus possibly special pay such as hazardous duty pay for aircrew members ($1,800). At the other end of the spectrum, a top general earns $181,501.20 in basic pay, and the top military officer (e.g., the Chief of Staff of the Army) receives $253,767.60. Meanwhile, in Major League Baseball, the minimum annual salary is $500,000. However, team payroll varies from $44,474,300 among the Houston Astros to $238,841,005 among the Los Angeles Dodgers, and thus the top salaries also vary enormously, ranging to 30 million dollars. When Allocators have wide discretion, the scientific challenge is to discover how they decide on the Actual Reward, for example, how much weight they place on productivity, market forces, and unit cohesion.

Like employers, judges may be subject to sentencing guidelines or relatively free in setting punishments. In some situations bargaining is widespread. In still other situations, the general public operates as a set of Allocators, determining, by their consumption decisions the earnings of writers and entertainers. Finally, parents and teachers routinely act as Allocators, teachers for a sequence of schoolchildren, parents for a single set. Parents decide how to allocate time, investments, gifts, and, finally, bequests. Teachers decide how to allocate time, praise, grades, and so on.

Scientific research provides wide scope for studying allocation rules in the rich and richly different settings. The classic earnings function introduced by Mincer (1958) shows how earnings depend on schooling and experience. Leventhal (1976) analyzes the objectives and strategies of allocation decisions, especially in the workplace. Blalock (1991) provides a comprehensive framework for analyzing allocation. Finally, separate literatures explore the behavior of those two ubiquitous sets of Allocators—parents and teachers (Behrman & Rosenzweig, 2004; Biberman-Shalev, Sabbagh, Resh, & Kramarski, 2011; Sabbagh, Resh, Mor, & Vanhuysse, 2006).

An incipient line of inquiry, to be considered in Sect. 11.3, is that the allocation rules used

implicitly or explicitly by Allocators may differ systematically by the configuration of Allocator, Rewardee, Reward, and spatiotemporal context. A second incipient line of inquiry pertains to discrepancies between allocation rules and/or subrules, discrepancies which may also be context-specific.

Determinants of the Just Reward. An early view, discussed by Merton and Rossi (1950), is the idea that the Just Reward varies as a function of another person's Actual Reward or as a function of a parameter of the Actual Reward Distribution (or a subdistribution thereof). This notion has the virtue that it involves reference groups but the weakness that it seemingly ignores direct operation of most Rewardee characteristics. Nonetheless, the Just Reward is sometimes formed in this way, as in the story of Cain and Abel or the case of gender-specific Just Rewards (Jasso 1981, pp. 357–358).

The importance of Rewardee characteristics in forming the Just Reward was soon noted by Homans (1961), Adams (1963, 1965), and Berger et al. (1972). The key insight underlying their reasonings is that ideas of the Just Reward are based, as Adams (1963, p. 425) put it, on beliefs about the "relations between input and outcomes," such as the American belief that "effort and reward must be positively correlated." Though this view led in their work to different models and setups (and different labels—for example, Rewardee characteristics are "investments" for Homans and "inputs" for Adams), two things are noteworthy. First, there is an essential similarity between the Homans and Adams formulations, as discussed and visualized by Brown (1986, p. 78). Second, the Just Reward remains implicit in Homans and Adams but becomes explicit in Berger et al.—as the dependent variable in a new Just Reward Function (Jasso, 1978, 1983a).

But Rewardee characteristics are not the only considerations guiding formation of the Just Reward. The justice principles, which may be thought of, roughly, as the "why" in "who should get what, and why," also consider the totality of the outcome distribution. Brickman

et al. (1981) introduced the distinction between principles of microjustice, which pertain to Rewardee characteristics, and principles of macrojustice, which focus on what the entire distribution should look like.

Meanwhile, the principles of justice spawned a large variety of subprinciples. The literature is rich with reasonings about justice principles and subprinciples. New empirical methods, such as the factorial survey, make it possible to test for the effects of multiple justice principles and subprinciples.

As with allocation rules, an incipient line of inquiry, to be discussed in Sect. 11.3, is that the justice principles used implicitly or explicitly by Observers may differ systematically by the configuration of Observer, Rewardee, Reward, and spatiotemporal context. A second incipient line of inquiry pertains to conflicts between justice principles and/or subprinciples, discrepancies which may also be context-specific.

The Hatfield Principle—Observer-Specific Just Reward. Crosscutting the determinants of the Just Reward is a fundamental principle owed to Elaine Hatfield: "Equity is in the eye of the beholder" (Walster, Berscheid, & Walster, 1973/1976, p. 4). Thus, as with the Allocator, the process by which the Observer generates the Just Reward may depend systematically on Observer characteristics. Hence, the challenge is to discern patterns and weights of justice principles and subprinciples across Observers and link them to Observer characteristics.

Parallel Structure of the Actual Reward and the Just Reward and Their Associated Processes. The Allocator, guided by allocation rules and subrules, assigns the Actual Reward; the process may be Allocator-specific, conditioned by Allocator characteristics. Similarly, the Observer, guided by justice principles and subprinciples, forms ideas of the Just Reward; the process may be Observer-specific, conditioned by Observer characteristics. Both allocation rules and justice principles are attentive to Rewardee characteristics, to Reward characteristics, to the resulting distributions, and to the spatiotemporal context.

Table 11.1 Parallel structure of the Actual Reward Process and the Just Reward Process

Actor	Guided by	Generates
1. Actual Reward Process		
Allocator	Allocation rules	Actual Reward
2. Just Reward Process		
Observer	Justice principles	Just Reward

Notes: The Actual Reward Process may be Allocator-specific, conditioned by Allocator characteristics. Similarly, the Just Reward Process may be Observer-specific, conditioned by Observer characteristics. Both allocation rules and justice principles are attentive to Rewardee characteristics, to Reward characteristics, to the resulting distributions, and to the spatiotemporal context

An incipient challenge is to identify the effects of each of the possibly many, and possibly competing, allocation rules in the Actual Reward Process and justice principles in the Just Reward Process, and to contrast their operation in the two processes. For example, the effect of effort on student assessment may differ across the Actual Reward Process and the Just Reward Process, and, importantly, may also differ across particular teachers, particular students, and particular schools. Similarly, the effect of schooling on wages may differ across the Actual Reward Process and the Just Reward Process, and, importantly, may also differ across particular employers, particular workers, and particular sectors of the economy. For visual concreteness, Table 11.1 provides a schematic representation of the parallel structure of the Actual Reward Process and the Just Reward Process.

The Justice Evaluation. The Justice Evaluation—the assessment that an Actual Reward is just or unjust—had long been implicit. In the twentieth century it gradually became explicit, emerging first as a three-category variable in Homans (1961, pp. 72–78), Adams (1963, p. 425ff, 1965, p. 282), Anderson, Berger, Zelditch, and Cohen (1969), Berger et al. (1972), and Austin and Walster (1975)—with categories of unjust underreward, perfect justice, and unjust overreward—next as a nine-category variable in Jasso and Rossi (1977)—four degrees each of underreward and overreward, plus perfect justice—finally as a continuous variable in Jasso (1978), with zero representing the point of perfect justice, negative numbers representing unjust underreward, and positive numbers representing unjust overreward. Explicit definition of the continuous Justice Evaluation is important because precise measures of magnitudes of experienced injustice are necessary in order to understand responses to injustice, as Adams (1963, p. 426) noted in his earliest work.

The Justice Evaluation Function. Comparison of the Actual Reward to the Just Reward yields the Justice Evaluation. It is evident from the definition of the Justice Evaluation that if the Actual Reward is equal to the Just Reward, the Justice Evaluation indicates perfect justice (represented by zero), and it is evident that if the Actual Reward is less than the Just Reward, the Justice Evaluation indicates underreward (represented by negative numbers), while if the Actual Reward is larger than the Just Reward, the Justice Evaluation indicates overreward (represented by positive numbers).

But what is the exact relation between the three terms? Empirical analysis of assessments of the fairness or unfairness of the incomes of fictitious people, collected from a probability sample of adult respondents, led to discovery of a special relation among the three terms, namely, a relation in which the Justice Evaluation varies as the logarithm of the ratio of the Actual Reward to the Just Reward (Jasso, 1978):

$$J = \theta \ln\left(\frac{A}{C}\right), \qquad (11.1)$$

where *J* denotes the Justice Evaluation, *A* denotes the Actual Reward, *C* denotes the Just Reward, and θ is the signature constant. The sign of the signature constant, called the framing coefficient,

is positive for goods and negative for bads; the absolute value of the signature constant, called the expressiveness coefficient, measures the Observer's expressiveness.

This special relation – the Justice Evaluation Function – embeds many useful and appealing properties (Alwin, 1987; Berger, 1992; Liebig and Sauer, 2016, Chap 3 of this handbook; Shamon and Dülmer, 2014; Turner and Stets, 2006; Wagner and Berger, 1985; Whitmeyer, 2004). These properties include deficiency aversion—the property that deficiency is felt more keenly than comparable excess (also known as loss aversion)—long considered central in matters of justice (Adams, 1963, p. 426; Adams, 1965, p. 282; van den Bos, Cropanzano, Kirk, Jasso, & Okimoto, 2015, pp. 238–239; Brown, 1986, p. 78; Homans, 1961, pp. 75–76; Törnblom 1977a, p. 11; Wagner & Berger, 1985, p. 719). To illustrate, if the Just Reward is 10, an Actual Reward of 5 yields a Justice Evaluation of −.693, but an Actual Reward of 15 yields a Justice Evaluation of +.405.

Other useful properties of the Justice Evaluation Function include scale-invariance (the Justice Evaluation is the same regardless of the currency or denomination in which the Actual and Just Rewards are measured—say, dollars or yen, hundreds or thousands); symmetry (interchanging the Actual and Just Rewards changes the sign of the Justice Evaluation but preserves its absolute magnitude); and the equivalence of the ratio representation favored by the Homans tradition and the difference representation favored by the Berger tradition—accomplished via the property of logarithms that the logarithm of a ratio equals the difference between two logarithms.

The loss aversion property of the Justice Evaluation Function, mentioned above, leads to a remarkable link to the Golden Number. It was once believed that the loss aversion ratio was constant and universal at 2—loss felt twice as keenly as gain. The Justice Evaluation Function, however, implies that the loss aversion ratio cannot be constant, and that it equals 2 when the Actual Reward equals the Just Reward plus or minus the product of the Just Reward and the Golden Number—or, put differ-

ently, when the loss or gain equals a fraction of the Just Reward equal to the Golden Number, or approximately .618 (Jasso, 2006, p. 209; van den Bos, Cropanzano, Kirk, Jasso, & Okimoto, 2015, pp. 239, 241–243).

The tradition of Homans, Adams, and Berger et al., discussed above as it relates to the Just Reward, has special relevance to the Justice Evaluation. That tradition dichotomized both the inputs and the outcome. Given that the inputs generate the Just Reward and that the outcome is the Actual Reward, inferences about the Justice Evaluation could have been made immediately. For example, Adams' (1963) analysis of the dichotomized inputs and outcomes of two workers, incorporating his assumption of a "positive correlation between inputs and outcomes", makes it possible to infer the sign of the Justice Evaluation of each of the two workers. To illustrate, if a worker has Low inputs and High outcome, that worker is overrewarded; and if a worker has High inputs and Low outcome, that worker is underrewarded. Thus, in this case of dichotomized inputs and outcomes, the sign of the Justice Evaluation—whether negative for underreward, zero for perfect justice, or positive for overreward—can be inferred solely from the inputs and outcome of a single worker. It is not necessary to compare the input-outcome ratios of two workers to learn what Adams sought to learn about each worker, namely, the "amount of inequity".

Similarly, the Justice Evaluation Function yields an equivalence between questions about the factors that shape the Justice Evaluation and factors that shape the Just Reward. For given Actual Reward, the question whether a Rewardee characteristic is associated with the Justice Evaluation is equivalent to the question whether that Rewardee characteristic is associated with the Just Reward. For example, the question whether women are less likely than men to report that they are underpaid is equivalent to the question whether women are more likely than men to report low Just Earnings for themselves, and the question whether men report more severe underpayment than women is equivalent to the question whether men report larger Just Earnings than women.

Observer Effects and Justice Sensitivity. Some Observers may be highly expressive, shouting their Justice Evaluation, while others may be reticent or subdued, whispering it. As well, some Observers may think about justice for longer periods of time than others, or a given Justice Evaluation may occupy the mind for longer durations in some Observers than in others. These Observer-specific effects are an element in justice sensitivity (Baumert & Schmitt, 2016, Chap. 9 of this handbook; Schmitt, 1996).

Justice Sensitivity and the Broader Set of Context-Specific Effects. Rewardee characteristics, Reward characteristics, and characteristics of the spatiotemporal context may also influence the expressiveness coefficient as well as the framing coefficient and the duration of the Justice Evaluation. For example, a particular Observer may frame the Reward as a good for some Rewardees and as a bad for others. Similarly, expressiveness may differ by characteristics of the Reward.

As with the Actual Reward and Just Reward Processes, an incipient challenge is to explore how framing, expressiveness, and duration of the Justice Evaluation differ or vary across configurations of Observer, Rewardee, Reward, and spatiotemporal context.

Inequality, *Poverty*, *and Justice*. The Justice Evaluation Function implies an explicit mathematical connection between inequality, poverty, and justice. Overall injustice, represented by the average of the Justice Evaluations, can be decomposed into injustice due to inequality and injustice due to poverty (Jasso, 1999, pp. 148–150, 2015a, p. 891).

Justice Consequences. From the very start of justice research, social scientists have been struck by the far-reaching behavioral and social consequences of the sense of justice (Adams, 1963; Jasso, 1980; Walster et al., 1976). Moreover, the social life can be regarded as fundamentally a meeting of justice sentiments; and groups of all sizes can be described and characterized by the

distribution of Justice Evaluations among their members. Indeed, Berkowitz and Walster (1976, pp. xi–xii), Adams and Freedman (1976, pp. 43–44), Homans (1976), Walster et al. (1976), and virtually every page of the far-seeing Berkowitz and Walster (1976) edited collection titled *Equity Theory*: *Toward a General Theory of Social Interaction* envision distributive justice as a cornerstone of a general, mathematized sociobehavioral theory "with the capacity to explain and to predict a broad spectrum of social behavior" (Adams & Freedman, 1976, p. 43).[3]

Theoretical analysis addressing the Justice Consequences has produced two kinds of theories, a nondeductive theory and a hypothetico-deductive theory. Both have the Justice Evaluation Function as their starting assumption, and both yield testable propositions. However, the propositions in the hypothetico-deductive theory are deduced from the Justice Evaluation Function, and thus their tests shed light on the relative fidelity of the Justice Evaluation Function to the real unknown world. Because both have the same starting assumption, they are sometimes combined into a hybrid theory.

Justice Consequences—Nondeductive Theory. The nondeductive theory approach, based on Toulmin (1953)—see also Fararo (1989)—constructs propositions that link an aspect of the Justice Evaluation—such as the Justice Evaluation itself, the absolute value of the Justice Evaluation, or the change in the Justice Evaluation—for one or more actors—or a feature of the Justice Evaluation Distribution—such as the absolute difference between the two Justice Evaluations in a dyad, the proportion underre-

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[3] Homans (1976, p. 231) cautions that justice cannot be the only cornerstone of the envisioned theory, that status and power also play foundational parts. In that spirit, Jasso (2008, 2015b) proposes a new unified theory based on three fundamental forces—justice, status, power—each operating on the same raw elements of personal quantitative characteristics like beauty and wealth, but characterized by a distinctive rate of change. For example, as wealth increases, the Justice Evaluation, status, and power all increase, but the Justice Evaluation increases at a decreasing rate, status at an increasing rate, and power at a constant rate.

warded (i.e., the proportion with negative *J*), the proportion overrewarded (the proportion with positive *J*), the average of the Justice Evaluations (also known as the Justice Index), and so on—with observable reactions to injustice—such as mechanisms to restore justice or the individual's propensity to depression or the dyadic cohesion or the societal propensity to revolution. This approach is implicit in much of justice theorizing and predates explicit development of the Justice Evaluation.

To illustrate, Törnblom (1977a) explored the crossclassification of the three-category Justice Evaluation, producing nine cells. For example, one of the two Rewardees might be underrewarded and the other justly rewarded, or one underrewarded and the other overrewarded, etc. The particular cell should give rise to distinctive reactions both for each Rewardee and for the relation between them. Törnblom (1977a) also notes that the magnitudes of the Actual Rewards may matter independently (they would go into the vector of other factors). For example, a CEO judging herself underrewarded and a clerical worker overrewarded and reflecting on their situations may react differently and behave differently than a clerical worker judging herself underrewarded and the CEO overrewarded. Further, there may be precise links between the configuration of Justice Evaluations and the Justice Consequences (Törnblom, 1977b).

Using similar reasoning, Jasso (1993, p. 243) proposed that the combination of negative Justice Evaluations about self and positive Justice Evaluations about others triggers revolution. That is, if people both judge themselves as underrewarded and judge others as overrewarded, the stage is set for large reactions to injustice.

Justice Consequences—Deductive Theory. The hypothetico-deductive approach treats the Justice Evaluation Function as a postulate—a Popperian guess about the nature of the world—and deduces testable consequences. Theoretical derivation is not automatic, especially if the goal is the "marvelous deductive unfolding" which not only yields a wealth of implications but also reaches novel predictions (Popper 1963, p. 221, see also p. 117, pp. 241–248). In this endeavor, mathe-

matics is the power tool, enabling long deductive chains which take the theory "far afield from its original domain" (Danto, 1967, pp. 299–300). Purely verbal arguments tend to tether the deduced consequences to overt phenomena in the assumptions, constraining fruitfulness and destroying the possibility of novel predictions. Instantiation, for example, cannot produce novel predictions, for novel predictions are novel precisely because nothing superficially evident in the assumptions could lead to them.

A large set of testable predictions has been derived. Although a few predictions were obtained in Jasso (1980), explicit deductive derivation dates to Jasso (1983b). Examples of predictions obtained to date include:

1. A thief's gain from theft is greater when stealing from a fellow group member than from an outsider, and this premium is greater in poor groups than in rich groups.
2. Parents of two or more non-twin children will spend more of their toy budget at an annual gift-giving occasion rather than at the children's birthdays.
3. Blind persons are less at risk of eating disorders than are sighted persons.
4. In a materialistic society, social distance between subgroups always increases with inequality.
5. Veterans of wars fought away from home are more vulnerable to posttraumatic stress disorder than veterans of wars fought on home soil.
6. In populations (or subpopulations) in which husbands earn more than their own wives, the divorce rate will increase with husbands' average earnings and wives' earnings inequality and decrease with wives' average earnings and husbands' earnings inequality.
7. In a group with subgroups, the lower-ranking in each subgroup will attach to the subgroup and the higherranking in each subgroup will think of themselves as individuals and band together in a third (emergent) subgroup.

Some of the predictions have been explicitly tested, others are consistent with previous empirical research, and many others await test. For example, the prediction about parental gift-giving

is consistent with known patterns of toy sales in the United States (Jasso, 1993), and the prediction of earnings distribution effects on divorce rates is consistent with Bellou's (2013) finding that as male wage inequality increases, the divorce rate decreases.

Theoretical analysis of Justice Consequences also yields interpretations of rare events, such as the invention of mendicant institutions in the thirteenth century and of detective fiction in the 19th—both attributable to a switch in valued goods from ordinal goods like birth to cardinal goods like wealth. And it also suggests the existence of fundamental constants, including a constant governing the switch between valuing cardinal and ordinal goods.

Crosscutting All the Terms—Justice Contexts. The relations embodied in the foregoing processes are thought to vary systematically not only with characteristics of the Observer, Rewardee, and Allocator but also with characteristics of the Reward, the time period, and the society, giving rise to the mnemonic *broats* (which stands for the characteristics of the benefit or burden, the Rewardee, the Observer, the Allocator, the time period, and the society). For example, consistent with the Hatfield Principle, every empirical analysis that has tested for Observer-specific Just Reward Functions and signature constants has rejected homogeneity, finding instead that Observers have distinctive ideas of justice and distinctive styles of expressing the Justice Evaluation.

11.3 New Outposts on the Justice Road

Above we discussed key elements in the study of distributive justice, including the three actors and four terms, together with the four processes in which they are embedded: The Allocator, guided by allocation rules, generates the Actual Reward for the Rewardee. The Observer, guided by justice principles, generates the Just Reward for the Rewardee. The Observer compares the Actual Reward and the Just Reward, generating the Justice Evaluation. The Justice Evaluation triggers

a large set of Justice Consequences. We noted the Hatfield Principle, whereby ideas of justice are Observer-specific, and the work of Leventhal (1976) and others, whereby allocation decisions are Allocator-specific. And we further noted that the operations in the four processes may also be specific to the Rewardee, the Reward, and features of the spatiotemporal context.

One of the most exciting ideas of the first decade-and-a-half of the twenty-first century pertains to the possibility that there may be configurations of particular kinds of Rewards and spatiotemporal contexts, together with matched pairs of Allocator-and-Rewardee or Observer-and-Rewardee, leading to distinctive sets of allocation rules and justice principles. For example, the allocation rules guiding a teacher-as-Allocator may differ by student characteristics, classroom, and temporal era, as well as whether the Reward is praise, gold stars, or grades. Similarly, the justice principles guiding Observers in the same situation—including students, their parents, other citizens, societal Guardians, etc.—may also differ by all the factors in the allocation situation, plus teacher characteristics. The same can be said of bequest situations involving parents and children and a variety of rewards, such as cash, stocks, real estate, furniture, and photographs.

This section provides a brief look at the exciting new ideas, as well as the models that may be used to assess them empirically.

11.3.1 New Outposts on the Justice Road: A Multiplicity of Allocation Rules and Justice Principles

Allocation rules figure prominently in several disciplines and subdisciplines—illuminating such disparate domains as school grades, college admission, earnings attainment, criminal sentencing, property division in divorce, and bequests. Justice principles figure prominently in the study of the fairness or unfairness of allocations in all those domains. The set of allocation rules and the set of justice principles overlap, but they are not identical; for example, some of the

mechanisms identified by Blalock (1991) and Leventhal (1976)—such as incentives for future performance—are not likely to appear as justice principles.

Nonetheless, in part because often the Allocator and the Observer are one and the same and in part because the two sets overlap, it is useful to examine both literatures. The current challenge is to establish typologies and taxonomies of both allocation rules and justice principles. First steps include reviews of allocation rules in particular domains, such as college admissions, prison sentencing, earnings attainment, and bequests; for example, Biberman-Shalev et al. (2011) examine teacher characteristics and allocation rules embedded in classrooms. In the realm of justice principles, useful overview and exploration are provided by Törnblom and Kazemi (2012a, 2015). Note that the two literatures nourish each other, each providing material that may be useful to the other.

Allocation rules have subrules, and justice principles have subprinciples. For example, Törnblom and Kazemi (2012a) formulate a "justice tree" which depicts subprinciples of each of the three main principles (equality, need, merit) and as well provide for further subsets of the performance subtype of the merit principle.

Sometimes, allocation rules come in conflict with each other and justice principles come in conflict with each other, as Törnblom and Kazemi (2012a, 2015) observe. Other times they are not in conflict, they merely coexist, and matter to greater or lesser extent in this or that situation or to this or that Allocator or Observer. For example, some employers weight punctuality and others do not, and some weight experience more highly than others, etc. Similarly, Observers judging the justice of earnings differ in the weights they attach to schooling, experience, etc. Parents-as-Allocators may agonize as to whether to leave equal bequests or instead to use bequests to equalize their children's financial well-being; and children-as-Observers will have their own justice ideas on the matter.

Moreover, in any situation, there may be discrepancies between Allocators and Observers, between the Actual Reward and the Just Reward, between the allocation rules used to arrive at the Actual Reward and the justice principles used to arrive at the Just Reward. Virtually every study that has examined both Actual Rewards and Just Rewards has found at least some discrepancies.

11.3.2 New Outposts on the Justice Road: The Hatfield Principle, Voting, and Inequality

Above we discussed the Hatfield Principle, whereby ideas of the Just Reward are Observer-specific. Thus, Observers are likely to disagree with each other about what constitutes the Just Reward for any Rewardee. And, indeed, as noted, every empirical study that has tested for interObserver differences has rejected interObserver homogeneity. Suppose that the allocation rule for wages in a particular workplace calls for voting by a committee of wage-setters; each wage-setter recommends a wage for each worker, and the Actual Wage for each worker will be the average of the recommended amounts. Now suppose that each wage-setter acts as Observer, forms an idea of the Just Reward for each worker, and recommends that Just Reward. Then the Actual Reward for each worker will be the average of the Just Rewards recommended for that worker. It then follows, by fundamental statistical theorems on the variance, that the larger the number of wage-setters and the greater their disagreements, the lower the inequality in the distribution of Actual Rewards (Jasso, 2009, 2015a, pp. 888–889). Thus, the combination of the Hatfield Principle and voting lowers inequality.

11.3.3 New Outposts on the Justice Road: Reward Characteristics

Ideas from the twentieth century about the importance of properties and characteristics of rewards (discussed in Sect. 11.2.3) have emerged in the twenty-first century in newly invigorated form. Building on Foa (1971), Törnblom and Kazemi (2012b) have spearheaded a new and close look at properties and characteristics of Rewards and their operation in distributive justice processes. A new challenge is to develop classification

schemes useful in configurations of Actual Rewards and Just Rewards. For example, a given Allocator may use different allocation rules for Rewards with different properties and characteristics, and similarly a given Observer may use different justice principles for Rewards with different properties and characteristics. Of course, concomitantly, for the same Reward, the allocation rules that guide the Allocator may differ from the justice principles that guide the Observer, adding to the richness of distributive justice situations.

The new conceptual ferment is evident on every page of Törnblom and Kazemi's (2012b) *Handbook*. Researchers from a variety of disciplines and approaches find new directions to explore. And these expand when placed alongside the multiplicity of allocation rules and justice principles.

Empirical assessment of these crosscutting operations is no easy matter. We turn next to a brief consideration of formal models and research designs for studying them.[4]

11.3.4 New Outposts on the Justice Road: Formal Models and Research Designs for Empirical Justice Analysis

The theoretical and empirical challenges are clear. In this Section we develop a few theoretically guided formal models and research designs to help meet the challenges. We already considered, in Sect. 11.2.3, the Justice Consequences and the Justice Consequences Process, together with developments of the twentieth century in formulating two kinds of theory—nondeductive and hypothetico-deductive—and testing the ensuing empirical propositions. Accordingly, here we focus on the first three of the four processes: the Actual Reward Process, the Just Reward Process, and the Justice Evaluation Process.

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[4] For fuller discussion of models and research designs, including tools for distinguishing between what people think, say, and do in justice matters, see Jasso (2015c).

Actual Reward Process. Table 11.2 shows the theoretical equation in which the Actual Reward is the dependent variable, and the independent variables are the broadest range of factors playing a part in the allocation rules—namely, Allocator characteristics, Rewardee characteristics, Reward characteristics, and characteristics of the spatiotemporal context. For convenience, we use *X* to denote independent variables which play a part in both the Actual Reward Process and the Just Reward Process and *Y* to denote independent variables which operate only in the Actual Reward Process.

Just Reward Process. Similarly, we report in Table 11.2 the equation in which the Just Reward is the dependent variable, and the independent variables are the broadest range of factors playing a part in the justice principles—namely, Observer characteristics, Rewardee characteristics, Reward characteristics, and characteristics of the spatiotemporal context. As before, *X* denotes independent variables which play a part in both the Actual Reward Process and the Just Reward Process, and now *Q* denotes independent variables which operate only in the Just Reward Process. Observer effects on the Just Reward Process exemplify some of the sensitivity effects introduced by Schmitt (1996) and discussed in Baumert and Schmitt (2016, Chap. 9 of this handbook).

Justice Evaluation Process. We already know that the Justice Evaluation depends on comparison of the Actual Reward and the Just Reward, as shown in equation (1), Table 11.2, and Fig. 11.1. But we still need to study determination of the signature constant θ, expressed in terms of its two components, the framing coefficient (the sign of θ) and the expressiveness coefficient (the absolute value of θ), as well as the duration of the Justice Evaluation. Accordingly, the section of Table 11.2 on the Justice Evaluation Process reports three equations besides the Justice Evaluation Function, each with its own dependent variable, the framing coefficient in one, the expressiveness coefficient in the second, and the duration of the Justice Evaluation in the third. The independent variables are the same as in the

Table 11.2 Summary of formal models

1. Actual Reward Process	$\ln(A) = \Sigma\delta X + \Sigma\gamma Y$
2. Just Reward Process	$\ln(C) = \Sigma\beta X + \Sigma\lambda Q$
3. Justice Evaluation Process	$J = \theta\ln\left(\dfrac{A}{C}\right)$ $\lvert\theta\rvert = \Sigma\beta X + \Sigma\lambda Q$ $\mathrm{sgn}(\theta) = \Sigma\beta X + \Sigma\lambda Q$ $\mathrm{T}(J) = \Sigma\beta X + \Sigma\lambda Q$

Just Reward Process, the full set of Observer, Rewardee, and Reward characteristics, plus characteristics of the spatiotemporal context. As in the Just Reward Process, Observer effects on the Justice Evaluation Process exemplify some of the sensitivity effects introduced by Schmitt (1996) and discussed by Baumert and Schmitt (2016, Chap. 9 of this handbook).

Some Research Designs. There are very many potential research designs, and each addresses a particular set of questions and collects particular kinds of data. Some designs assess only one of the three Processes, others two, others all three. Some designs collect many judgments from each respondent and/or follow respondents over time, others not. Here we discuss five basic research designs. All can be fruitfully elaborated. As well, other designs can be formulated and fielded.

Design 1. *Respondent is both Observer and Rewardee, and data are collected on both the Actual Reward and the Just Reward*. This design makes it possible to estimate jointly both the Actual Reward equation and the Just Reward equation in a sample or several subsamples. If estimated in a single sample, this design yields estimates of summary parameters of the two equations, leading to test of the set of hypotheses that each independent variable operates the same way in generating the Actual Reward and in generating the Just Reward. To illustrate, in a study focused on earnings, the results will inform whether schooling has the same or different

weights in producing the Actual Reward and the Just Reward, whether experience operates the same way, and so on. If, on the other hand, the equations are estimated separately in subsamples—say, men and women, and/or different countries—the results will inform about differences in the effects of the independent variables on the Actual Reward and the Just Reward separately within the sex-specific and/or country-specific subsamples, leading to further results concerning gender and country differentials in congruence between the Actual Reward Process and the Just Reward Process.

The basic design can be elaborated in several ways, including more restricted subsamples and more specific hypothesis tests. As well, this design makes it possible to test for differences in the unobservables in the Actual Reward equation and the Just Reward equation.[5]

Design 2. *Respondent is both Observer and Rewardee, and data are collected on both the Actual Reward, the Just Reward, and the Justice Evaluation*. This design requires that the Justice Evaluation be measured in as refined a way as possible—for example, by using a number

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[5] For examples of this design, see Jasso and Resh (2002), who found that actual grade and just grade are shaped in a similar way by student ethnicity and parental education but are affected differently by gender and ability, and Jasso and Wegener (1999), who found large variability in the mechanisms by which actual earnings and just earnings are determined both across gender and across country.

matching task. In addition to all the analyses that can be carried out using the Design 1 protocol, this design makes it possible to also estimate the framing and expressiveness equations.

A preparatory step is required. The Justice Evaluation is regressed on the logarithm of the ratio of the Actual Reward to the Just Reward in a set of thirty or forty subsamples (chosen to represent substantively meaningful partitions, such as men living in a given city who are of a certain age, etc.). That regression yields one estimate of the signature constant for each subsample. The expressiveness coefficient can then be regressed on the characteristics of the subsample; and the framing coefficient can be analyzed via a binary probit or logit.

Design 3. *Respondent is Observer, and data are collected on the Just Reward for multiple Rewardees.* The Rewardees can be actual persons or fictitious; if fictitious, this is a factorial survey. In both variants of this design, the Just Reward is regressed on Rewardee characteristics, separately for each respondent. The estimates obtained for each respondent—concerning the effects of Rewardee characteristics on the Just Reward, as well as the equation *R*-squared—are then regressed on respondent characteristics. This design (sometimes called a direct design because it directly measures the Just Reward) thus yields estimates of the joint operation of Observer and Rewardee characteristics on the Just Reward. Elaborating the design would yield additional estimates. For example, if each respondent rated two different Rewards per Rewardee—say, grades and praise in a schooling context, or wages and pensions in an earnings context, or cash and keepsakes in a bequest context—estimates of the effects of Reward characteristics would also be obtained.

Design 4. *Respondent is Observer, and data are collected on the Justice Evaluation about the Actual Rewards randomly attached to multiple fictitious Rewardees.* This is a factorial design, sometimes called the one-reward-per-rewardee indirect design. This design has two preparatory steps. The first step is to estimate the signature constant θ for each respondent; this is accom-

plished via one of two protocols, (1) by regressing the Justice Evaluation on the natural log of the Actual Reward, separately for each respondent, or (2) by regressing the Justice Evaluation on the natural log of the Actual Reward and the Rewardee characteristics, again separately for each respondent. At the second step the Just Reward is calculated for each respondent-Rewardee combination; this is accomplished by using an algebraic re-statement of the Justice Evaluation Function, where the Just Reward is expressed in terms of the Justice Evaluation, the Actual Reward, and the signature constant θ. At the conclusion of the two preparatory steps, the stage is set for the two following steps. First, the Just Reward is regressed on Rewardee characteristics, separately for each respondent, yielding respondent-specific estimates of the just returns. Second, the just returns to Rewardee characteristics, the expressiveness coefficient, and the framing coefficient are regressed on respondent characteristics (using a binary probit or logit for the framing coefficient regression). This design thus yields information not only about the joint operation of Observer and Rewardee characteristics on the Just Reward but also about the effects of Observer characteristics on framing and expressiveness.

A simple elaboration—providing multiple randomly attached Actual Rewards for each Rewardee—makes it possible to go further and estimate the effects of Rewardee characteristics on each respondent's framing and expressiveness, illuminating new kinds of impartiality.

Design 5. *Respondent is Observer, and the respondent keeps a diary of all justice-related thoughts and behaviors—for example, Just Rewards and Justice Evaluations—about both self and others.* This design makes it possible to assess the duration of Justice Evaluations and estimate the effects of Observer characteristics, Rewardee characteristics, and Reward characteristics on duration, and possibly as well the effects of characteristics of the spatiotemporal context.

Note that fielding these designs simultaneously in different countries and different time periods and about different Rewards would add valuable knowledge.

11.4 Concluding Note

Humans form ideas of fairness, and they assess the fairness or unfairness of the rewards that they and others receive. These ideas and assessments set in motion a large train of behavioral and social consequences, at all levels of analysis, across farflung topical domains, and in groups of all sizes.

This chapter provided an overview of the world of distributive justice, starting with the three key actors—Allocator, Observer, and Rewardee—and the three key terms—Actual Reward, Just Reward, Justice Evaluation, and Justice Consequences—and embedding them in four basic processes: the Actual Reward Process, the Just Reward Process, the Justice Evaluation Process, and the Justice Consequences Process. These processes may vary by the configuration of Allocator, Observer, Rewardee, Reward, and features of the spatiotemporal context. The challenge is to accumulate reliable knowledge about their operation, and to that end the chapter briefly examined theoretical contributions and empirical research designs.

Along the way, the chapter discussed (1) the link between inequality, poverty, and injustice, (2) the possibility that, given the Hatfield Principle whereby ideas of Just Rewards vary across Observers, voting rules that produce Actual Rewards by averaging Just Rewards may reduce inequality in the Actual Reward Distribution, and (3) the longstanding idea that distributive justice, by yielding implications for farflung topical domains, is a cornerstone of the emerging general theory of behavioral and social phenomena.

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Procedural Justice

12

Riël Vermunt and Herman Steensma

12.1 Introduction

Justice is a phenomenon that is studied from many disciplines like philosophy, political science, sociology, economy, law, and finally also social psychology. Tyler (2012) remarks in his overview of the history of justice and morality research that classical texts on social psychology did not even mention the study of justice. From the sixties onwards, however, the study of justice and its different forms, distributive justice, procedural justice, retributive justice, and restorative justice, has received increased attention in social psychology. In the current handbook, each of these categories is discussed in a separate chapter (see Chaps. 11–14 of this handbook).

Gonzales and Tyler define procedural justice experiences of people as "…how fairly they are treated" (Gonzales & Tyler, 2007, p. 91). Procedural justice or fairness should be conceived of as a dimension that runs from fair to unfair. Pioneers of the study of procedural justice were Rawls (1971) and Thibaut and Walker (1975), who developed ideas about the influence of procedures on establishing and maintaining stable

social interactions and goal attainment. Moreover, fair procedures help to accept allocation of duties and burdens. In the aftermath of these pioneering works, many studies have been devoted to facets as the antecedents, the process, and the consequences of procedural justice. In the present chapter, we will work out each of the three facets of the study of procedural justice and describe the relevant theories and research. After having described a short history of procedural justice research with a special focus on the core principles, we will discuss antecedents, processes, and consequences of procedural justice, followed by a Conclusion and Discussion section.

12.2 The Core Principles of Procedural Justice (PJ)

In the procedural justice area, it is hypothesized that the way allocation decisions are made influences the reactions of people to these decisions. Satisfaction of people in situations where outcomes (tasks, money, goods, social outcomes, etc.) are allocated is heavily influenced by the *procedure*s used in the situation. Giving a complete review of the history of PJ is not possible, due to space limitations. We therefore discuss the core principles of PJ, roughly in "historical" order.

The term procedural justice in the legal arena appeared first in a study by Thibaut, Walker, &

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Lind, 1972. The study aimed to assess the influence of adversary information presentation on legal decision making. Perceptions of the fairness of procedures may be influenced by several factors. Thibaut et al. (1972) were the first to demonstrate how procedures used to arrive at a court decision have strong effects on fairness judgments, independent of the favorability of the outcomes. Researchers have offered several explanations of the effects procedures may have on outcome evaluation. Some researchers adhere to the view that instrumentality is the key, i.e., the better a procedure serves your interests, the more fair it is perceived to be. If you somehow are able to control procedures, you will evaluate these procedures as fair. This explanation was also discussed by Thibaut and Walker (1975). However, they made an interesting distinction between two forms of control: Decision control and process control. Decision control refers to control over the actual decisions that are made, while process control refers to control over the presentation of evidence. Thibaut and Walker studied procedural justice in a legal setting. They argue that people want control—either decision control or process control—because control is seen as instrumental to the attainment of desirable outcomes. Process control is, actually, a form of "voice", i.e., people have a say, they have the right to present their personal view on reality and on the causal chain of events, but they don't have the formal power to make the final decision (Folger, 1977). Decision control in general will be seen as more instrumental than process control. Still, most people are highly satisfied with procedures in which they have process control. However, sometimes special characteristics of persons, situations, allocations, and types of resources may lead to lower levels of perceived fairness and/or less positive effects (see later in this chapter).

A very practical model of procedural justice was developed by Leventhal (1980). He described six rules or criteria that if followed will result in more positive procedural justice judgments. The first criterion is consistency: Allocation procedures must be applied consistently, both across people and over time. The second criterion, bias suppression, states that personal self-interest and

preconceptions of allocators are not allowed to play a role in the decisions. The accuracy rule prescribes that all decisions should be based on information that is good and accurate. However, sometimes decisions are made that may have undesirable effects or that have violated procedural fairness norms. Therefore, the correctability criterion should be included in the list of fair procedures. This criterion implies the existence of opportunities to ask for modifications of decisions, so persons have the right to appeal against a decision. Representativeness is the rule that the concerns of all important (sub)groups and individuals are somehow represented in the allocation process. This is often realized by giving voice, or by the appointment of persons who represent the (sub)groups. This representativeness rule stimulates participation of workers in decision making committees in organizations (see Cohen, 1985). Finally, the ethicality rule prescribing that allocation processes must be compatible with high ethical standards. Leventhal's procedural rules rely strongly on the instrumental value of procedures. Two models were developed focusing on the non-instrumental value of procedures.

The relational model of procedural justice and the group value model pay special attention to relationship issues (Lind & Tyler, 1988; Tyler & Lind, 1992). Procedures and treatments that seem to indicate a positive relationship between the person and his/her group or authority are judged to be fair. Three factors are the most important predictors of procedural fairness: trust, standing, and neutrality. We will discuss this in the section on antecedents of procedural justice. Here we note that the fairness criteria of the relational and group value model combine procedures with ways of behaving in social interactions. There are also researchers who make an explicit distinction between procedural (in)justice and interactional (in)justice. For example, Bies and Moag (1986) published a study on interactional justice, in which they discuss four communication criteria of fairness. These criteria are truthfulness (be candid and truthful in the communication with your interaction partner), respect (polite, respectful

communication), propriety (refrain from improper comments, don't ask about irrelevant private matters), and justification (give adequate explanations to justify decisions). Cohen (1991) also pointed out that a high quality of interaction between parties is necessary to reach social justice. In a later study, Bies (2005) tried to answer the question: "Is interactional justice merely a form of procedural justice?" His answer was "no", and following the earlier analysis of Greenberg (1993a, 1993b), he proposed that there are two different components of interactional justice, namely informational justice and interpersonal justice. Moreover, Bies argued that justice concerns should be viewed more broadly, in terms of encounters, and not just social exchanges. It should be noted here that researchers paid attention to information as a criterion of fairness in a rather late stage of organizational justice research. However, many human resource managers and organizational change consultants have always been aware of the huge impact the presentation of information may have. Keeping people well-informed is a necessary condition for the successful implementation of organizational changes. Nowadays, attention has been paid to the aspect of adequate notice, or advance notice, particularly in studies that focused on performance appraisal in organizations. See, for instance, the studies of Kanfer, Sawyer, Earley, and Lind (1987), Cropanzano and Randall (1995), Taylor, Tracy, Renard, Harrison, and Carroll (1995), Steensma and Visser (2007). The general finding in these studies was that adequate notice has positive effects on the perceived procedural fairness of performance appraisals, on satisfaction with performance appraisal sessions, and on acceptance of the outcomes and commitment to the organization.

The theoretical position that a sharp dividing line should be drawn between procedural and interactional justice is not very popular among social psychologists. However, most organizational psychologists view these forms as two clearly distinct constructs. This can perhaps be explained by the emphasis organizational researchers place on (measurement of) anteced-

Table 12.1 Aspects of procedural and interactional justice

- Decision control (influence on outcomes)
- Process control; voice (opportunity to give opinion and to present evidence)
- Consistency rule (procedures are the same for different persons, and consistent over time)
- Bias suppression (including suppression of personal self-interest)
- Accuracy (decisions should be based on accurate information)
- Correctability (existence of methods for modifying decisions)
- Representativeness rule (take into account the concerns and viewpoints of persons and groups affected by the decision)
- Ethicality rule (use ethical principles)
- High quality of interaction (treat all persons well)
- Information (supply adequate and correct information to all persons involved)

ents or "trigger conditions" and consequences, while social psychologists emphasize psychological processes. In this chapter, we will continue discussing aspects of both procedural and interactional justice. The main criteria of procedural and interactional justice are summarized in Table 12.1.

Procedural/interactional fairness judgments are based on the perception of the extent to which enacted procedures and interactions comply with the more or less "objective" principles (criteria) of procedural justice and interactional justice. The perceived fairness of separate procedural and interactional aspects may be combined into a more general judgment of perceived fairness.

Researchers have developed scales to assess individuals' justice judgments of enacted procedures. In experimental research as well as in field studies, several scales are used to measure individuals' justice judgments of the applied procedure. Colquitt and Shaw (2005, pp. 142–147) give representative examples of measuring procedural justice. In their Appendix, items to assess not only procedural justice, but also to assess the justice of distributive, interactional, and informational rules/criteria are shown.

12.3 Antecedents of Procedural Justice

12.3.1 When Procedural Justice Judgments Are Made

A major contribution to procedural justice theory and research is made by Van den Bos and Lind (2002). They connect uncertainty management with fairness. They state that fairness judgments are made in order to manage uncertainty. According to Van den Bos and Lind, people live in a world which is fundamentally unpredictable: people cannot predict the future. Whether they do their best to get more information to predict the future, this information simply is not available. This constitutes basic or structural (trait) uncertainty. The other situation occurs when people have insufficient information about "relationships, agendas, or norms" (Van den Bos & Lind, 2002, p. 4). The uncertainty stemming from this lack of information is not basic: people can find information to fill the knowledge gap. When people would have (take) time to study the characteristics of the situation, complete information, in principle, can be achieved. This information gathering process costs time people often do not have. According to Van den Bos and Lind, this lack of information constitutes state uncertainty. The authors further specify the type of information persons lack and that provokes uncertainty: incompatibility between different cognitions, between cognitions and experiences, or between cognitions and behavior. Further, the authors assume that uncertainty management is a crucial factor to instigate fairness judgments. For instance, Van den Bos and Lind (2002) hypothesized that especially in situations of social interdependence with the risk of being exploited, information about fair treatment may reduce uncertainty about this relationship. If recipients have no information about the trustworthiness of the actor, fairness information is used as substitute to evaluate outcome characteristics like satisfaction with the outcome.

Another approach to answer the question when procedural fairness is important in peoples' lives is offered by Terror Management Theory (TMT; Rosenblatt, Greenberg, Solomon, Pyszczynski, & Lyon, 1989). People have a basic anxiety related to the experience of being mortal. Cultural values developed in the past and present protect persons from being reminded of these scaring thoughts and the accompanying negative emotions. Positive experiences like being treated fairly push away the negative thoughts and feelings and reduce anxiety, while being treated unfairly brings those negative thoughts and feelings to the foreground and thus increases anxiety. Persons have a strong appetite to be released from negative thoughts and feelings as well as a strong appetite to experience positive thoughts and feelings. The culture-anxiety buffer has two components: Culture provides values emanating from the view that the world is a just place where good things occur to good people and bad things to bad people. The other component is related to the belief that people should live up to these standards. The first component is closely related to Lerner's belief-in-a-just-world concept (Lerner, 1980). In their study Van den Bos, Poortvliet, Maas, Miedema, and Van den Ham (2005) showed that both uncertainty as well as mortality salience affected emotional reactions to unfair treatment: both manipulations led to more anger and hostility when confronted with an inaccurate procedure. However, uncertainty management manipulation turned out to have a stronger effect on subsequent reactions than mortality salience manipulation.

The relational model of authority and the group-value model claim that judgments of procedural justice are instigated by relational concerns: trying to know one's relationship to others and to the group authority (Lind & Tyler, 1988; Tyler & Lind, 1992). These models show ways how to reduce uncertainty and anxiety in social relationships. According to these models, procedures are evaluated by persons to get an indication of how one is viewed by the group and by the authority using these procedures. Procedures have implications for feelings of self- worth and for beliefs about the fair and proper functioning of the group and/or the authority. Procedures that are judged as fair often indicate a positive relationship between the person and his/her group or authority. However, procedures that are perceived

as unfair often are an indication that the person has a negative relationship with an authority, group, or organization. In the relational model of procedural justice, three factors are seen as the most important predictors of procedural fairness: Trust, standing, and neutrality. Trust involves beliefs about the good intentions of the authority (the group leaders; managers who have power to make decisions about allocations). Authorities that act ethically and demonstrate concern for the needs and views of group members can be trusted to try to behave fairly. "Standing" has to do with one's status position in a group. Information about the status position is communicated by the treatment group members receive. Dignified, respectful, and polite treatment conveys the implicit message that one is seen as a valuable member of the group. Such treatment is perceived as fair. The neutrality factor refers to neutral decision making, based on objective facts and on honesty, and it involves the absence of bias and prejudice. Tyler and Lind categorize the way an authority treats persons to whom outcomes are allocated as a form of procedural justice. Apparently, their model combines more or less formal procedures with ways of behaving in social interactions. The most important characteristic of the group-value model is that treatment by the authority is an indication of a persons' status position in the group.

12.3.2   How Procedural Justice Judgments Are Made

In working out the operation of the justice motive (Lerner, 1980), one may assume that procedural in justice will be experienced when the procedure received is felt as undeserved: The experienced procedure deviates from what people think they deserve. From Skitka and coworkers' theoretical ideas (Skitka & Houston, 2001), one could infer that procedural injustices that touch people's moral standing on an issue (moral convictions) have strong effects on subsequent attitudes and behaviors. According to Folger (2001; Folger & Cropanzano, 2010), experiencing an injustice instigates a "deontic state" motivating people to restore justice. Törnblom and Vermunt (2012) argue that procedural justice theories "posit an ideal ('ought') goal state toward which people are assumed to strive. An ideal goal state is achieved when a person's actual situation matches the ideal. If the two do not match, the person will perceive the situation as discrepant, resulting in psychological/ emotional and behavioral responses." (Törnblom & Vermunt, 2012, p. 186). The sparking event, according to Bies and Tripp (2004), that instigates feelings of unfairness is when rules are violated or when a person is treated disrespectfully. In procedural justice theories, discrepancy is defined as the mismatch between the actually applied procedural rule and the rule considered just (e.g., Folger, 1987; Lerner, 1980; Vermunt, Wit, den Bos, & Lind, 1996), and the larger the discrepancy the more unfair the procedure is evaluated. When the ideal goal state is formed by strongly held convictions or strong obligations, the discrepancy between the ideal goal state and the perceived one will result in strong emotions and motivates people strongly to restore the just state.

Physiological components of discrepancy. When recipients experience a discrepancy between, for instance, voice promised by an actor and actual received voice, two pieces of information are compared with each other. The promised (expected) voice and the actual received voice are pieces of information retrieved from memory as well as from the visual cortex. These pieces of information may show a discrepancy which means that the expected voice from memory and the actual voice from the visual cortex do not fit. So-called predictive coding models propose that this process of cognitive inference "proceeds as an iterative matching process of top-down predictions against bottom-up evidence along the visual cortical hierarchy" (Egner, Monti, & Summerfield, 2010, p. 16601). It is further assumed that one group of units in the cortical hierarchy encodes conditional probability of a stimulus (expectation) and the other group of units encodes the mismatch between predictions and bottom-up evidence. In case of word presentation as top-down process, it will be the striatum,

amygdala, and orbitofrontal cortex (see O' Doherty, 2009). Especially when learning and consolidation of information in memory is accompanied by strong emotions, neural activity during detection of discrepancy is increased.

12.4   Procedural Justice Processes

12.4.1   Procedural and Outcome Information

The justice experience of procedures colors the justice of outcomes and vice versa. Van den Bos, Lind, Vermunt, and Wilke (1997) showed that when information about outcomes is missing, procedural justice information functions as proxy for assessing the fairness of the outcome. Also the timing of the information is important for the influence of distributive justice information on procedural justice judgments (Van den Bos, Vermunt, & Wilke, 1997). Based on fairness heuristic theory (Lind, Kulik, Ambrose, & deVera Park, 1993), Van den Bos, Lind et al. (1997), Van den Bos, Vermunt and Wilke (1997) predicted that procedural information that is received before distributive information influences fairness judgments more than when procedural information is received after distributive information.

Mayer, Greenbaum, Kuenzi, and Shteynberg (2009) showed that when an outcome violates a central aspect of a person's identity, receiving voice does not affect their judgments of the fairness of the procedure. The authors reason that people receiving an outcome that violates their identity will search for flaws in the procedure to downgrade the unfavorable outcome. Participants indicating high identity violation showed lower correlation between voice and procedural/distributive fairness judgments than participants reporting low identity violation.

Another important aspect of people's life is their job. Jobs constitute one part of person's identity and life fulfillment. Companies often use downsizing to increase the company's competitive position. The consequence of this organizational change is that employees are laid off on a permanent basis. Following other authors (e.g.,

Brockner, Grover, Reed, & DeWitt, 1992), Hemingway and Conte assume that fair procedures have positive effects on victims' as well as survivors' fairness judgments of the layoff. Information about procedures in layoff cases is received earlier than information about being laid off. Hemingway and Conte (2003) asked 23 full-time employees to evaluate the fairness of 100 hypothetical layoff practices. The results show that specifically severance package (financial compensation) and managerial consistency had by far the largest impact on fairness judgments. Treating all personnel equally during the layoff process was the main component of the managerial consistency measure: the consistency over persons component rather than the consistency over time component. People compare themselves with others, and if a managerial decision outcome is negative, being treated in the same way as others comforts a bit. It compensates for the experienced status loss. Severance package is the most important factor influencing procedural fairness judgments.

Sobieralski and Nordstrom's (2012) vignette study supported only partly Hemingway and Conte's (2003) results: The severance package showed to be the most important determinant of distributive fairness judgments and not of procedural fairness judgments of the layoff process. Moreover, Sobieralski and Nordstrom found that layoff of senior employees affected most procedural and interactional fairness judgments. They explain this result by emphasizing that "Participants may view it as disrespectful or an insult to an employee's company loyalty to be laid off relative to a less senior employee." (p. 16). So, it seems that information about procedures that is received first does not in all conditions affect subsequent fairness judgments to the same degree.

12.4.2   Emotions and Cognitions

Emotions. Emotions have always played a crucial role in justice theorizing and research. In justice theories, emotion is a feeling state (Mullen, 2007) linked to a specific allocation event with a relative high intensity and relative short duration.

Emotions can be elicited by components of the allocation event: outcome, procedure, and resource type and resource valence. Emotions can function as information to evaluate the fairness of a procedure (Van den Bos & Lind, 2002). Emotions can also be the consequence of justice experiences and affect judgments and behaviors.

Emotionsas consequence. For long in the procedural justice research tradition, emotion was regarded as the consequence of fair and unfair allocations: people become angry after being treated unfairly and they feel delighted being treated fairly. Mikula, Scherer, and Athenstaedt (1998) concluded from own and other's research that unjust events elicit emotions like anger and guilt. In the procedural justice realm, Folger (1987) found that participants experienced less resentment when an unfavorable outcome was combined with a fair procedure. In this type of studies—see also Greenberg (1993a, 1993b)—participants react to the unfavorable outcome combined with a fair or unfair procedure. The question is relevant whether participants will also react emotionally to an unfair procedure without information about the favorability of the outcome. In their study, Modde and Vermunt (2007) found that treating participants unfairly—not applying the evaluation procedure that was promised—elicited feelings of anger, irritation, and insult. The study was conducted in such a way that participants received information about the applied procedure before they received information about the favorability of the outcome.

Barclay, Skarlicki, and Pugh (2005) found for inward-focused emotions (shame and guilt) that respondents reported them most when an unfavorable outcome was combined with a fair procedure. The unfavorable outcome was attributed to own functioning and not to the behavior of others. Moreover, the authors found that an unfair procedure elicited anger regardless of the favorability of the outcome.

The cognitive appraisal theory of procedural justice predicts that a procedure that is unfair but harmless will elicit less emotion than an unfair and harmful procedure (Cropanzano & Folger, 1989). Resentment was highest in the harmful unfair condition. A harmful and unfair procedure elicits not only moral emotions, but also self-preservation emotions and results in feelings of injustice as well as frustration, ending in high resentment. Weiss, Suckow, and Cropanzano (1999) reasoned that unfair procedures may have positive aspects and thus extended the cognitive appraisal approach by introducing an unfair procedure that may be favorable or unfavorable for the person. They showed that most anger was elicited when a negative outcome was achieved by an unfair but favorable procedure.

Emotionsas cause. Cropanzano, Stein, and Nadisic (2011) underscore Mullen's approach that emotions are antecedents as well as consequences of justice experiences. Moreover, from their description of the relationship between self-theories of justice and emotions, we conclude that emotions are at the center stage of justice experiences. Mullen (2007) developed the affective model of justice reasoning (AMJR) to account for the reactions of recipients and observers to an allocation procedure (and outcome). Appraisal of an allocation event may be negative, eliciting certain emotions and subsequent actions. In case of a negative interpersonal treatment, recipients' and observers' appraisal elicits negative emotions like anger, disgust, sadness or disappointment (Mullen, 2007, p. 19), affecting their fairness judgments. Thus, people becoming angry about a negative interpersonal treatment will seek out information that is consistent with the "conclusion that events were unfair.." (p. 18). They engage in biased information processing to seek evidence that the event was unfair. People becoming sad about the negative interpersonal treatment engage in substantive processing to try to make clear what is happening.

Haidt and Graham (2007) as well as Skitka (2002) conclude that in evaluating the fairness of allocation events, moral intuitions and moral mandates may overrule other simulation tactics. Mullen and Skitka (2006; see also Skitka, Bauman, & Mullen, 2016, Chap. 22 of this handbook) found that outcomes violating their moral mandate led to feelings of anger which in turn affected their justice judgments. In this line of

reasoning, Skitka and Houston (2001) found that the fair process effect was effective only when the outcome was uncertain. In the conditions in which the guilty defendant was convicted and the innocent defendant was acquitted—in line with the participants' convictions—the fair process effect was reversed: the voice offered to defendants was obstructing their moral convictions.

Another way of relating emotions to fairness is offered by Miller (2001). In interpreting the impact of distributive justice and more that of procedural and interactional justice on emotions, theorists more and more are inclined, according to Miller, to emphasize the role of status enhancement. A salary increase not only conveys information about a person's material standing, but also about his/her immaterial standing: the fact that the company values the person's contribution, affecting his/her status. Miller finds it therefore difficult to draw a sharp distinction between distributive and procedural (in)justice (see also Ambrose & Arnaud, 2005). In the case of procedural justice, the balance is different: More emphasis is on the immaterial basis than on the material one. The distinction between the basis of procedural justice judgments and distributive justice judgments is thus one of degree and not of substance. Vermunt (2014) agrees with Miller and adds that distributive and procedural justice both are justice evaluations of different types of resources. Distributive justice is often concerned with the justice evaluation of material resources, while procedural justice is often concerned with the justice evaluation of immaterial resources (see also Törnblom & Vermunt, 2012). But this distinction is more due to the research tradition than to a theoretical stance. In some situations, a procedure can be material as well, as in the example of a bribe: the bribe is the way a person will try to get a favorable outcome. Anyway, status or prestige, according to Miller, is the crucial determinant of distributive and procedural and interactional justice evaluations. Miller (2001) concluded from an overview of relevant literature that anger is related to disrespect and thus to a person's status position. Being treated with disrespect elicits feelings of anger. Miller cites Lazarus (1991) who asserts that insult is the primary com-

ponent in the arousal of anger. Findings indicate that anger elicits the experience of injustice.

Cognitions. The cognitive approach of social justice research was dominant from the very beginning. According to many researchers (Folger, Rosenfield, & Robinson, 1983; Vermunt et al., 1996), social comparison gives a strong standard for evaluating the fairness of procedures. Folger views the comparison process as a heuristic process with which persons try to understand their world: the simulation heuristic derived from work of Kahneman and Tversky (1982). Persons use counterfactual thoughts to evaluate the fairness of a procedure: the so-called referent cognitions. The ease with which these counterfactual thoughts can be retrieved from memory forms a strong condition for the appearance, for instance, of the fair process effect: the effect that a fair procedure ameliorates the negative effect of an unfair outcome (den Bos & Van Prooijen, 2001). Ease of retrieving alternative information has stronger effects in no-voice than in voice conditions.

Heuristics are shortcut thoughts to define quickly a situation, for instance, the relationship with an authority. Lind (2001) argued that valued resources can be achieved by identifying and accepting the directives of the authority. However, following the authority makes one vulnerable for exploitation. Fairness heuristics judgments help a recipient to gauge the trustworthiness and neutrality of the authority. Lind et al. (1993) reasoned that authorities' trustworthiness is often difficult to settle and that recipients use fairness heuristics to make quick judgments. A fairness heuristic is defined as " a psychological shortcut to decide whether to accept or reject the directives of people in positions of authority"(p. 225). Van den Bos, Vermunt, and Wilke (1997) tested the main proposition of the fairness heuristic theory that people form heuristically fairness judgments by using whatever information is available. Moreover, Van den Bos, Wilke, and Lind (1998) found that fairness heuristics are used to find out how trustworthy the authority is.

It is interesting to note that, later, Folger (see e.g., Folger & Skarlicki, 2008) assumed that justice has a deontic basis: applying a procedure

(or outcome) is based on the belief that an actor has the moral obligation to do justice to recipients and thus is obliged to apply a fair procedure. The obligation is derived from a "general law" of doing one's duty (Kant, 1785). A recipient experiences the moral obligation of the actor as well, because the perception is often derived from the in-group's social and cultural climate that applying procedures fairly is a common good. If a recipient experiences that the applied procedure is not in accordance with what he/she expects based on what actor is morally obliged to do, the recipient will evaluate the procedure as unfair. Interpreting Folger (see Folger, 2001; Haidt & Graham, 2007; Skitka, 2002), one may claim that people compare the actual received procedure with the procedure the recipient believes the actor should apply. Following this reasoning, the strong impact of moral mandates or moral intuitions as compared to social comparison on the evaluation of allocation events can be understood (see also Bies & Tripp, 2004). It is interesting to note that in the Skitka and Houston (2001) study, the improper procedure was operationalized as the detective who gave false information about his informant, while in the proper procedure condition the detective told the magistrate true information about the informant. Lying, according to Haidt (2003), breaches one of the core moral intuitions people hold. This information is put against the moral convictions people hold about convicting a guilty defendant and acquiting an innocent one. In this case, two moral convictions compete with each other. Why is it then that the one conviction (guilty persons should be convicted) has a stronger effect on subsequent fairness judgments about procedure and outcome than the other one (lying vs. not-lying)? Further research of cultural influences as well as emotions on moral convictions is necessary.

12.4.3 The Moderating Process

Moderators may enhance the strength of some relations between antecedents to fairness, perceived fairness, and effects of perceived fairness (satisfaction etc.), but sometimes moderators weaken the strength of relations. Several modera-

tors have been studied by justice researchers. For lack of space, we can only mention the main moderators here (i.e., personality factors; cross-cultural and context factors; demographic variables) and specify only a few of their effects. Readers who want more details can contact us for a more complete report.

Personality factors. Personality variables may affect the strength of the link between objective characteristics and perceived (in)justice, and the link between perceived (in)justice and the attitudes and behaviors of the persons. Important moderators are: Justice sensitivity (Schmitt and Dörfel (1999), Protestant Work Ethic (Ryan, 2002); Self-esteem (Vermunt, Peeters, & Berggren, 2007); Just World Belief (Bègue & Muller, 2006); Regulatory Focus (promotion vs. prevention focus). Focus of participants on instrumentality or on relations with group members and authorities is an important moderator. Ståhl, Vermunt, and Ellemers (2008a) showed that inducing participants with an instrumental focus directed their attention to favorability aspects of the procedure, while a relational focus directed attention to procedural fairness.

The list of moderating personality variables is still growing. For example, recently Pierro, Giacomantonio, Kruglanski, and Van Knippenberg (2014) found that perceived leader procedural fairness has a stronger positive relationship with the effectiveness of leaders for followers with higher needs for cognitive closure. Such followers have strong desires to reduce uncertainty (Kruglanski, 2004), and leader procedural fairness is reducing their uncertainty (Janson, Levy, Sitkin, & Lind, 2008).

Cross-cultural influences and context effects. Culture influences the perceptions of what is (un)fair and the reactions to (un)fairness. In particular cultural value dimensions such as individualism-collectivism-->,uncertainty avoidance, power distance, masculinity-femininity, and "time perspective" are important. For instance, "voice" is important in individualistic, low power-distance cultures. Power differences can moderate effects of procedural fairness.

Reputation of an out-group authority (neutral or biased) influences the effects of fairness of procedures on reactions to the authority (Ståhl, Vermunt, & Ellemers, 2008b). In line with the group-value model, Van Prooijen, Van den Bos, and Wilke (2004, 2005) showed that information about participant's intragroup status influenced more strongly their reactions to procedural fairness than participants who were ignorant about their status position (Van Prooijen, Van den Bos, & Wilke, 2005). Van Prooijen et al. (2004) demonstrated that participants who are included in a group react more strongly to variations in procedural fairness than participants who are excluded from the group.

Other moderators. Demographic variables (in particular, gender differences; Hack & Lammers, 2009), deservingness (Heuer, Blumenthal, Douglas, & Weinblatt, 1999), resources, and procedures (Vermunt, Kazemi, & Törnblom, 2012) may also act as moderators.

12.5 Consequences of Procedural (in)Justice

In this section, we discuss effects of procedural fairness, followed by a discussion of consequences of procedural unfairness on people's lives in the political and legal arena, and in organizations.

Cooperation. As predicted by the relational model of authority (Tyler & Lind, 1992), fair procedures have positive effects on acceptance of decisions by authorities, whether they are legal authorities, political authorities, or organizational authorities (Tyler, 2012); fair procedures promote cooperation (Tyler & Blader, 2003); these procedures breed positive attitudes towards the legal system (Tyler, 2006). Cooperation with and positive attitudes toward authorities as a consequence of fair procedures have been observed in victims of crime and in perpetrator's reactions. Mediation between victims and perpetrators results in more positive attitudes towards mediators if parties perceive the applied procedures as fair (Wemmers & Cyr, 2006).

Payment. The effects of procedural justice on payment evaluations are studied as well (Brockner, 2002; Greenberg, 1987; Schaubroeck, May, & Brown, 1994). Greenberg (1993a, 1993b) showed that fair procedures (adequate explanation for inequitable payment were given) reduced effects of unfair outcomes (reduction of pay) on employee theft. Greenberg (1993a, 1993b) explains employee theft by referring to the frustration-aggression hypothesis: frustration about the payment cut results in aggressive acts of theft. The other explanation is given by the compensation hypothesis: payment loss is compensated by taking goods (money) from the company. Adequate explanation of the payment cut (apology and signs of remorse) reduced employee theft considerably. In another study, Greenberg (1987) found that low monetary outcomes (far lower than participants expected: $1 instead of $8) were evaluated as fair only when the procedure that was used to arrive at the assessment of the monetary outcome was perceived as fair. No effects of procedural fairness on high ($7) or medium ($4) monetary payments (instead of $8) were found.

Psychological reactions to unfair rewards are studied often in the procedural justice literature (Greenberg, 1987; Modde & Vermunt, 2007; Skarlicki & Folger, 1997). In these studies, participants receive less money than they think they deserve. They react by norm-violating or destructive behavior like stealing and demolishing equipment. In general, fair treatment reduces the effects of unfair outcomes on norm-violating behavior, even when information about the outcome is absent (Modde & Vermunt, 2007).

Commitment. In the justice literature, organizational commitment (Brockner et al., 2003) is studied as well. Brockner et al. (2003) found that procedural fairness reduced the effects of outcome favorability on participants' appraisal of the system. The authors reason that the more fair procedures the more people are inclined to attribute favorable outcomes to themselves and not to the system, thereby reducing the relationship between outcome favorability and support for the system measured by organizational commitment.

Fair procedures are a signal that the person is val- ued by the group, authority, or organization and may therefore strengthen commitment. Colquitt (2001) found that procedural justice is a good predictor of commitment to the group.

Self-evaluations. Moreover, Brockner et al. (2003) argue that the effects of procedural justice evaluations on subsequent reactions are depen- dent on the dependent variable. With regard to self-evaluations, Brockner et al. found that high procedural justice heightens the effect of out- come favorability on self-esteem. Brockner, De Cremer, Fishman, and Spiegel (2008) assume that low procedural fairness strengthens external- ization of the reasons for their outcomes, whereas high procedural fairness leads people to believe that they received the outcomes they deserved.

Concluding, there is substantial support for the positive effects of procedural fairness on unfair monetary outcomes. When the outcome of the allocation is related to status (self-evaluation, self- esteem, identity, system evaluation), applying fair procedures has mixed results: When the outcome is favorable fair procedures enhance self-evalua- tion, but not when the outcome is unfavorable, and fair procedures have no effects on self-evaluation when outcomes are central to the person. Procedural justice has positive effects on organiza- tional commitment when outcome justice is low, and procedural justice reduces the effects of out- come favorability on appraisal of the system.

Personnel selection. It is important that applica- tion of procedural fairness will start in an early stage, i.e., in the stage of organizational entry (or group entry). This guarantees consistency of fair- ness policy. As discussed before, the consistency rule of Leventhal (1980) is an important principle of procedural justice. Therefore, we will give a short discussion of the fairness of selection sys- tems. Gilliland (Gilliland & Hale, 2005) outlines dimensions along which procedural, interactional, and informational justice rules can be managed in the selection process, and according to Gilliland, managing selection processes fairly will have a variety of positive consequences. These justice rules of Gilliland can be grouped into three cate-

gories: Formal characteristics, aspects of explana- tion, and interpersonal treatment (interactional justice). Research shows that some cultural dimensions are likely to influence the salience of justice rules in personnel selection (Steiner & Gilliland, 2001). Moreover, a comprehensive measure of Gilliland's procedural justice rules has been developed. This measure, the "Selection Procedural Justice Scale" (SPJS), may be used to test Gilliland's model and to assess particular dimensions of fairness in field settings (Bauer et al., 2001; Steensma & Doreleijers, 2003).

Aggression. Procedural injustice may cause stress and frustration. Stress, and in particular frustra- tion, may be a cause of aggression (Berkowitz, 1989). We will focus on aggression in organiza- tions, since most studies on injustice and aggres- sion chose that domain, and in particular on procedural and interactional injustice. Aggression is one of the most troubling issues facing organi- zations. Researchers make a distinction between at least two different forms: "external" aggression and "internal" aggression. External aggression is the violent or threatening behavior of organiza- tional "outsiders", such as robbers, thieves, cus- tomers, and the general public. Internal aggression, on the other hand, is committed by colleagues, supervisors, and (sometimes) subordinates. This form of workplace aggression includes behaviors such as socially isolating a person, verbal threats, spreading rumors, physical attacks, harassment, and attacking a victim by taking unpleasant orga- nizational measures (Einarsen, 1996). Bullying or "mobbing" is the continual and deliberate repeated malicious treatment of a target person, or a small group of individuals. Unfair treatment is an important cause of aggression as we will show in the next section.

In a large-scale study (Divosa, 2000) on exter- nal aggression in municipal welfare services, it was shown that transgressions of procedural and interactional justice principles easily may provoke acts of aggression, committed by those on welfare. This finding supported our hypothesis that the lower the quality of procedural justice aspects is, the higher the aggression level will be. Particularly important aspects seem to be information; clarity

of rules; consistency of treatment over time; length of time before decisions are taken; correctability; and decision control. A second study found evidence that both unfair procedures and unfair treatment of recipients of welfare lead to aggression and anger, with evaluations of procedures and treatment as mediators (Steensma, Van der Bent, Barreto, & Pat-El, 2007).

Internal aggression: Bullying. High job control (Karasek, 1979) meets the procedural justice criterion of giving a certain amount of "voice" to workers; it is a form of process control (and, for high levels, even decision control). But low levels of job control may be frustrating to workers, in particular in situations with a high workload. Since frustration often leads to aggression, low levels of job control may result in higher levels of internal aggression. The relationships between job demands, job control, and internal aggression have been studied by many organizational psychologists. For two early studies, see Hubert, Furda, and Steensma (2001). Some more recent studies were done in a large research program in Belgium and Spain (see, for example, Baillien, De Cuyper, & De Witte, 2011). The results of these (and almost all other) studies indicate that, indeed, risks for internal aggression—bullying in the workplace—are high in situations with high job demands and low job control. High job control—a form of procedural justice—was associated with low levels of bullying. This result was found both in the cross-sectional studies, and in longitudinal studies (Baillien et al., 2011; Hubert et al., 2001). Finally, the way a leader behaves is highly relevant for procedural and interactional justice. Many studies have found that poor leadership often contributes to bullying in groups and organizations (see Hubert et al., 2001).

Other effects. So far, we have discussed the effects of procedural injustice on aggressive behavior. However, injustice may also have other negative effects, while perceived justice may lead to positive outcomes. Therefore, we also present some more general information on the outcomes of procedural (in)justice. For a more complete picture of the other effects, see Conlon, Meyer, and Nowakowski (2005). Conlon et al. review the lit-

erature on the "good", the "bad", and the "ugly" outcomes arising from (un)fairness in organizations. In their model, organizational justice has four forms: distributive, procedural, interpersonal (i.e., interactional), and informational justice. "Good" outcomes may be expected from multiple forms of justice, so also from procedural and interactional fairness. Conlon et al. (2005) pay particular attention to positive effects of fairness on task performance and employee compliance. We want to add here that organizational citizenship behavior (OCB) also will be enhanced by high levels of procedural and interactional justice. OCB is the positive behavior of employees who voluntarily are doing more for the organization and for their colleagues than is expected from them in their role requirements. The recent longitudinal study by Lehmann-Willenbrock, Grohmann, and Kauffeld (2013) found evidence for a clear link between procedural justice and two forms of OCB: civic virtue (including such acts as volunteering for extra-role tasks, making suggestions for improvement) and co-worker citizenship behavior or OCBI (altruistic behaviors to help colleagues). "Bad" outcomes are the several forms of withdrawal behaviors, i.e., absenteeism, turnover intentions and turnover behavior, and "employee silence" (Conlon et al., 2005). Several studies demonstrate that organizational unfairness may cause turnover and absenteeism. Procedural, distributive, and interactional injustice could all have such negative effects. Procedural injustice has in some studies stronger negative effects than distributive injustice, but there are exceptions. Finally, the "ugly" outcomes are *deviant* counterproductive work behaviors, including theft, crime, drug and alcohol abuse, accidents, sabotage, sexual harassment, and the several forms of workplace aggression. We have already discussed the problem of aggression, and some "theft" studies. As for the other forms of "ugly" outcomes, both field and lab studies supported hypotheses that distributive, procedural, and interactional injustice predict such types of deviant behavior (see, e.g., Fox, Spector, & Miles, 2001; Weiss et al., 1999).

Stress. Procedural justice has positive effects on stress reduction. Tepper (2001) showed the positive

effects of procedural fairness on health. Tomaka and Blascovich (1994) found that stressed individuals reacted positively to fair treatment, and Vermunt, Peeters and Berggren (2007) showed saliva cortisol (the stress hormone) reduction after fair treatment.

Cyberloafing, i.e., unauthorized personal surfing on the Internet and sending non-work related e-mails is a special form of organizational counterproductive behavior. Lim (2002) found that such cyberloafing may be a response to perceived procedural (and distributive and interactional) injustice.

Outcomes of procedural (*in*)*justice*: *Conclusion*. Organizational justice is highly valued by employees and seems to lead to positive outcomes for the organization and for the employees. But all forms of organizational *injustice* may have negative outcomes ("bad" and "ugly" outcomes) and counterproductive and dysfunctional behaviors in which organizational members intentionally commit acts to harm the organization and/or the people within the organization.

12.6 Procedural Justice: A Social Regulation Tool

Justice and specifically procedural justice is a strong social regulation tool, shaping and coordinating social interactions and stimulating cooperation between individual persons, between individuals and groups, and between individuals and society. Moreover, justice regulates motives, goals, beliefs, social identity, and behavior of persons and groups (De Cremer & Van Dijke, 2009). Two models containing several of the above-mentioned characteristics of PJ as social regulation tool will be sketched here. The one model is the *group engagement model* of Tyler and Blader (2003) and the other is the *self-based model of cooperation* (SMC) by De Cremer and Tyler (2005). In both models, trust in interaction partners and particularly in authorities plays an important role. The group engagement model states that positive evaluation of resources and procedural justice combined strengthen identifi-

cation of members with their group. The identification leads to more positive attitudes, values, and voluntary cooperative behavior (Tyler & Blader, 2003). The self-based model of cooperation suggests that fair procedures contribute to a strong positive social self. The stronger social self may lead to transformation of goals, positive evaluations of group members and authorities, more trust, and finally, more cooperation and less competition. This implies better outcomes for members of groups, organizations, and society. The combination model of SMC and group engagement model illustrates that, in times of change, justice reduces uncertainty about future outcomes and about belongingness to valued groups. This has a positive effect on cooperative behavior. Again, this demonstrates the potential of justice as a tool of social regulation.

12.7 Conclusion and Discussion

In this chapter, three elements of procedural justice research were used to structure the large amount of findings: the antecedents, the processes, and the consequences of procedural (in)justice. The antecedents of procedural justice remind us of three main functions of procedural justice: People focus on procedural justice to reduce anxiety and uncertainty and to serve their self-interest. The question whether reduction of anxiety or of uncertainty is the most important drive for using procedural justice information is still open, although a direct test showed evidence of the relevance of the uncertainty explanation. Because anxiety and uncertainty touch vital emotions, more research is needed. In this way, procedural justice judgments and experiences have a psychological function.

A second function of procedural justice reminds us of the relationship individuals have with others. The group value model and the relational model of authority focus on the relationship individuals have with others. Procedural justice is important in our interaction with powerful authorities who can exploit us and gives us information what our status position in the group is. So, procedural justice judgments and

experiences have a function for people's status position toward others.

The third function of procedural justice reminds us not only that we are part of a social community, but also of a moral community: The way people are treated gives an indication of the appropriateness of attitudes and behaviors in relation to others. When people strongly identify with a group or collectivity and adopt its basic beliefs, these beliefs may become guidelines for behavior and evaluations. And these beliefs may overrule other guidelines that bind people to their group. Procedural justice judgments and experiences have a moral function.

The research reviewed in this chapter shows the negative consequences of unjust treatment. These consequences may be detrimental for the maltreated person, becoming stressed, they may be detrimental for the social and physical environment like in bullying, or in destructive behaviors, or they may be detrimental for the moral community as in norm-violation. However, fair procedures have mostly positive consequences for the person, feeling good by being treated well, it leads to group harmony and acceptance of rules, and it strengthens the norms the group applies.

Theory and research findings of procedural justice experiences offer solutions to many issues arising in the relationships between individuals and between individuals and groups. However, some issues need more attention: The complex structure of groups, the precise assessment of fairness judgments, and the relationship between procedural and distributive fairness.

The literature shows strong adherence to the group-value model and the relational model of authority. Research findings, however, leave open some interesting questions. For instance, how can the negative effects of out-group derogation be combined with the group-value model to contribute to a more just organization or society? It is worth studying the multi-level character of a group with antagonistic subgroups in relation to the values of the different subgroups.

In addition, only a few studies tackle the issue of the strength and type of reactions against unfair treatment, and the relationship between procedural unfairness and frustration. The first issue is important for introducing measures to reduce unfairness, while the second issue improves the proper assessment of procedural fairness experiences. Also the relationship between procedural fairness and morality should be worked out further, although good approximations are still made, like the deontic approach, moral mandates, and moral intuitions ideas.

Cognitive-emotional processes of blame attribution have received less attention in the procedural justice literature than in the distributive justice one. The interesting observation can be made that coworkers who blame an actor for bad behavior will retaliate, while when the actor is not seen as blameworthy revenge is not imminent. Is bad behavior an instance of an unfair procedure or is it an instance of unfair outcome? The way the research is carried out, it is a reaction to an unfair outcome. The issue how blame attribution operates in a full-fledged allocation event is worth studying.

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Retributive Justice

13

Michael Wenzel and Tyler G. Okimoto

In Alexandre Dumas's novel *The Count of Monte Cristo* (1844), the protagonist falls victim to an intrigue that sees him deprived of his love and life and innocently incarcerated until, after many years in prison, he manages to escape and uses a windfall wealth to assume a new identity and take revenge on those who betrayed him. As a reader, we sympathize with the protagonist for the suffering and injustice he endures, and we take satisfaction from the cunning plots he invents to punish his tormentors. Dumas's novel is only one example; our culture abounds with stories, fictional and historical, that feature themes of punishment and revenge for perceived injustice. A random sample of daily newspapers reflects almost a societal obsession with adequate or inadequate punishment for transgressions; where inadequate, many readers seem to experience this as a secondary and possibly vicarious victimization. Our societies have built elaborate institutions to channel the desire to see wrongdoers punished, to make sure the process is orderly, civil, impartial and fair. But what punishment is

fair? Why would we even feel motivated to punish wrongdoers or see them punished, or how do we justify punishment? Why would we gain satisfaction from seeing wrongdoers suffer? What motives, needs or concerns does punishment alleviate? And where exactly does seeing a wrongdoer punished leave us and our ability to come to terms with or move on from the wrongdoing? These are merely some of many interesting questions in a field we refer to as retributive justice (see Hogan & Emler, 1981; Jost & Kay, 2010; Tyler & Smith, 1998; Vidmar, 2000; Vidmar & Miller, 1980).

Wherever there are rules and norms of human coordination and organization, there are those who violate these rules and norms, and others inclined to respond to such violations. This occurs at a microlevel of interpersonal relations, between friends and strangers, in family and intimate relationships, and between colleagues or subordinates and supervisors at work; but this also occurs at meso and macro levels of intergroup relations, between teams in organizations, supporters of sports teams, ethnic and national groups, and so on. It is therefore not surprising that issues of punishment in response to wrongdoing have occupied thinkers for centuries and in a multitude of academic disciplines, including philosophy, sociology, criminology and legal studies, political sciences, economics, organization and management studies, history, anthropology, animal studies, and psychology.

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In the current chapter, we focus on the psychological perspective on punishment. While influenced by other disciplines, philosophy and sociology in particular (Vidmar, 2000), there are unique aspects to the perspective that psychology takes. First, different from philosophy in particular, psychology is not concerned with normative prescriptions as to when, why, and how a rule-breaker should be punished, but rather with understanding how and why individuals seek punitive responses to wrongdoing. We cannot derive normative ethical prescriptions as to how a transgression *should* be responded to from empirical observations—this would be a form of naturalistic fallacy. Nonetheless, it would be perilous for moral philosophers to ignore principles of human psychology when developing normative arguments, and likewise so for law-makers, who would risk that their laws lack justice and legitimacy in the eyes of the people and lose prescriptive force (Darley & Gromet, 2010). Second, psychology is concerned with the subjective experiences and viewpoints of individuals (in social context) rather than an objective assessment of the wrongdoing and commensurate response. For example, whereas a philosophical position of consequentialism requires that punishment indeed has certain consequences such as deterring from committing a wrong (Brooks, 2012), for psychology the question is whether individuals *believe* this to be the case; indeed, research often focuses on the recognition of such contradictions in individuals' beliefs and behaviour, affect and cognition, prediction and experience.

Indeed, individuals may be described as "intuitive prosecutors" (Tetlock, 2002) whose responses to wrongdoing follow the main prescriptive retributive and consequentialist notions of moral philosophy, but based on situation appraisals shaped by psychological principles of human cognition, emotion, and motivation of a socially constituted self. Thus, from the perspective of psychology we are interested in what punishment philosophies individuals adopt, and further how they appraise the situation, how they react emotionally, and what concerns and needs they seek to address through punishment. More

recent advances in the psychology of retributive justice specifically stress that we not only consider the functions and justifications of punishment, but also the meaning of the wrongdoing. Beyond an appraisal of a wrongdoing in abstract terms of seriousness or costliness (and the matching of the right level of punishment to that appraisal), the symbolic meaning of the wrongdoing for the victim and moral community needs to be considered in order to understand how punishment might meet their needs or satisfy their concerns.

Following a discussion of key definitions, the present chapter will review relevant research regarding punishment as a response to wrongdoing. It will illustrate, and hopefully illuminate, the complex and multifaceted nature of the field of retributive justice. We will begin with possible evolutionary origins of retributive justice, move on to more reflective philosophies of punishment prevalent in societal discourse, and discuss psychological underpinnings of individuals' adoption of particular philosophies or goals of punishment. We then focus on how exactly punishment as a response to wrongdoing (i.e., retribution) may satisfy a psychological justice motive. We highlight the communicative function of retribution and its ability to address symbolic threats or concerns that derive from a wrongdoing. Finally, we will argue that while retribution may be sought to alleviate various concerns and to repair justice, its capacity to do so as well as individuals' choices of punishment for these purposes can only be adequately understood if alternatives to punishment are considered.

13.1 Defining Retributive Justice

Retributive justice refers to the subjectively appropriate punishment of individuals or groups who have violated rules, laws, or norms and, thus, are perceived to have committed a wrongdoing, offence, or transgression (we use these terms interchangeably). Punishment can be understood in a wide sense as any negative outcomes (cost, loss or suffering, which can be

material or symbolic) imposed on an offender in response to a wrongdoing (Brooks, 2012). They are not, however, imposed costs or losses that merely serve a redistribution of outcomes, for example, where a burglar is required to return the stolen goods; these responses might be more appropriately called compensatory justice (Darley & Pittman, 2003). Rather, it is crucial for retributive justice that the wrongdoing itself is responded to (irrespective of the distributive injustice it has caused). The wrongdoing is a fact that cannot simply be undone and requires an additional response (Tyler & Smith, 1998). Of course, as emphasized before, in psychology we are concerned with subjective experiences; thus, while the distinction between compensatory and retributive justice is conceptually valid, offenders may in fact experience an enforced compensation as punitive (i.e., "compensatory retaliation"; see Mullen & Okimoto, 2014).

Another important element of our definition of retributive justice is that the punishment is imposed on the offender by another party, either a third-party with authority to impose a punishment (e.g., judges in our legal system) or the victim in an act of revenge (McKee & Feather, 2008; although note that we do not discuss the distinction between victim revenge and third-party retribution in the present chapter; see also Gollwitzer, 2009; Vidmar, 2000). We are not considering self-inflicted punishment as a form of retributive justice, even if it may well be a response through which offenders wish to seek penance and repair justice (e.g., Nelissen & Zeelenberg, 2009). Self-punitiveness with its admission of wrongdoing and acceptance of guilt would rather seem like a (unilateral) step to consensus-based restorative justice, even though not necessarily an effective one (Woodyatt & Wenzel, 2013). For our conceptualization of retributive justice, the punishment needs to be imposed.

However, not all negative outcomes imposed on a person or group constitute punishment as understood here. Rather, it is important that the outcome is imposed in response to a perceived wrongdoing. That means we are not dealing with punishment as a means of reinforcement or conditioning of certain behaviours (Brooks, 2012).

Of course, once the behaviour that a conditioner wishes to change is not merely undesirable but considered morally inappropriate or wrong, the boundaries between the two understandings of punishment become fuzzy. Indeed, one of the punishment perspectives we will discuss below—consequentialism—aims at the shaping of behaviour not unlike processes of conditioning in learning paradigms. Crucially, however, it is a response to, and may aim at the prevention of, wrongdoing.

13.2   Evolutionary Origins

While human society may have become more sophisticated in its responses and systems of retributive justice, it is nevertheless possible that punishment in response to wrongdoing is not a human invention but rather can be found among other species as well, and that it may have deeper evolutionary roots. Despite a growing interest in the study of justice in animals, most of the research so far has focused on distributive justice or equity, and less on retributive justice (Brosnan, 2012; Talbot, Price, & Brosnan, 2016, Chap. 21 of this handbook). Certainly, punitive or aggressive responses, for example against those who challenge an existing rank order or defy territorial claims, are common in the animal world (Clutton-Brock & Parker, 1995). More problematic is the issue of whether these behaviours qualify as retributive justice as defined, and, more generally, whether it is appropriate to use the same vocabulary of justice and fairness for animal behaviour as we do for human behaviour (see Pierce & Bekoff, 2012). Rather than a mere means of forcing cooperation and maximizing outcomes, retributive justice involves the imposition of a negative outcome against the responsible party in response to their unjust or unequitable actions.

Research suggests that non-human species do detect and respond to inequities. For example, capuchin monkeys trained to exchange tokens for cucumber with a human experimenter refused to complete the exchange (hand over the token, or accept and consume the food) when another monkey received a more favourable exchange for

grapes (Brosnan & de Waal, 2003; see also Pierce & Bekoff, 2012; Price & Brosnan, 2012). It remains a continual methodological and empirical challenge, though, to demonstrate that the inequity response is indeed due to the sense that the obtained outcome or treatment is less than what is owed rather than merely less than what is desired. For example, Brosnan and de Waal (2003) found that when presented with a more desirable grape alternative, capuchins showed elevated exchange refusal, but the effect tended to decline over several trials; in contrast, exchange refusals tended to increase in the inequity condition suggesting that, distinctively, a relative deprivation maintained its aversive character more than absolute deprivation did.

The observed response in such research is commonly the refusal to cooperate or to engage in the exchange. While this is costly to the "unfairly" treated individual (even if in the long-term it may pay off in maintaining more rewarding future cooperation), it does not impose a punishment on the responsible party. Even when punishment does seem to occur, it is difficult to attribute the response to inequity. Raihani and McAuliffe (2012) and their colleagues studied cleaner fish who, often in pairs, maintain a symbiotic relationship with a client fish and remove and eat ectoparasites off their client. Male cleaner fish punished female co-cleaners who drove client fish away by biting the client fish rather than feeding on its parasites. Thus, it would seem the male cleaner fish engages in retribution for the female breaking the rules; however, other studies indicate that cleaner fish are not sensitive to inequity and the authors conclude that the punishment behaviour is therefore more likely enforcement of cooperation rather than of equitable behaviour. Yet, one could argue that inequity is not the only rule violation that may be the basis for a retributive justice response: while perhaps ignorant of the social-comparison-based inequity the female cleaner fish causes, the male does seem to respond to the female's selfish disregard of the feeding rules with punishment. This may be learnt self-interested behaviour, but it may also be an evolutionary precursor to retributive justice.

Research in behavioural economics uses experimentation with humans (often abstract experimental games capturing participant choice behaviours) to uncover fundamental psychological processes in retributive behaviour that might also point to evolutionary roots (see Konow & Schwettmann, 2016, Chap. 5 of this handbook). For example, in the "ultimatum game" (Güth, Schmittberger, & Schwarze, 1982) one player can propose an offer to divide a fixed amount of money, while the other player can either accept the offer and both receive the proposed shares or reject it and neither player gets any money. Evidence shows that the second players tend to reject offers the more that these deviate from an equal split, even though any rejection goes against economic principles of self-interest maximization (see Camerer, 2003). Such costly punishment occurs within single-round ultimatum games and other dilemmas that have no long-term incentive to encourage cooperation (e.g., Walker & Halloran, 2004). Even "third parties" who merely witness the exploitative behaviour (Fehr & Fischbacher, 2004) are often willing to punish unfair offers at a cost to their self-interested outcomes.

One theoretical account for such "altruistic punishment" argues for an evolutionary advantage of social fairness norms in facilitating cooperation within a group (Fehr & Fischbacher, 2003) and the function of "strong reciprocity" in maintaining the norms (Gintis, Boyd, Bowles, & Fehr, 2005). Strong reciprocity means that individuals cooperate with or reward those who abide by fairness norms and punish those who violate them even at a personal cost. The norms become ends and values in themselves. Altruistic punishers may indeed gain reputation benefits as a consequence, which could be a more proximal process that maintains such behaviour (e.g., Kurzban, DeScioli, & O'Brien, 2007). Alternatively, it may be inequity aversion (Fehr & Schmidt, 1999) and the experience of negative emotions in response to a violation of fairness and cooperation norms (Fehr & Gächter, 2002) that lead individuals to punish the norm violator (see also Turillo, Folger, Lavelle, Umphress, & Gee, 2002). Interestingly, Xiao and Houser (2005) found that when participants were allowed

to express their anger reaction to their partner in an ultimatum game, their rejection rate (i.e., punishment) to unfair offers was significantly reduced, indicating that emotion expression is indeed of substantial concern to individuals.

However, Xiao and Houser's (2005) results might also point to a somewhat different explanation for costly punishment; namely, the anger could also derive from the insult, inferiority, and reputation threat that the proposer's unfair offer implies (Pillutla & Murnighan, 1996). Punishment and, alternatively, anger expression may allow individuals to re-assert their pride and power. In other words, individuals may not be concerned about fairness norms per se, but rather about the devaluation they experience when others dare to disregard the norms towards them. Yamagishi et al. (2009) studied a variant of the ultimatum game, the impunity game, where the individual's rejection of an offer had no implication for the partner; it only meant the individual would not accept and receive the share offered and, thereby, it would only increase the inequity (similar to the capuchin monkeys' response option above). The authors yet found substantial rates of rejection (even privately, in a condition where their partner would not know about their rejection), suggesting that individuals reject the implied insult or characterization of them as easy targets.

To summarize at this point, research arguing evolutionary underpinnings of retributive justice, whether in animals or humans, faces the continual friction between explanations in terms of enforcement of cooperation and responding to an injustice. There is so far little empirical indication for the latter in the animal world, but quite compelling evidence that norms of fairness can underlie punishment among humans. Yet, it remains contentious whether this is an altruistic concern for the values of one's group or a more egoistic concern for the value of the self. As we will see, these issues will remain relevant also for our further discussion. However, we need to caution that the artificial and restrictive nature of these studies may have limitations for our understanding of societal processes (Guala, 2012), in particular as the response options provided are limited to one form of punitive sanction and do commonly not allow any action other than the punitive response (cf. Lotz, Okimoto, Schlösser, & Fetchenhauer, 2011) nor any coordination between individuals towards bilateral justice repair. Ignored is the human capacity to reflect about goals of punishment and to engage in normative debate over institutionalized sanction systems.

13.3 Preferences for Different Punishment Philosophies

Human reflection on whether, how, and why we should punish offenders has a long history, although the debate has been largely dominated by two broad opposing doctrines: deontology and consequentialism (see Brooks, 2012, for a review). Deontology, represented in particular by the philosophy of Immanuel Kant (1785/1993), refers to an ethic of duty or obligation, requiring us to take a certain course of action because it is the moral, right, or just thing to do (irrespective of its consequences). The most commonly discussed deontological punishment philosophy is retributivism, which means that the transgression requires punishment of the offender in order to restore justice (see Cottingham, 1979). Justice requires that people get what they deserve; therefore, proportionately punishing the offender restores the moral order disturbed by the wrongdoing.

In contrast, consequentialism measures the ethicality of a course of action by its benefits versus costs, a view represented by the philosopher Jeremy Bentham (1843/1962). Punishment would be the ethical course of action to the extent that it yields benefits for society, specifically in preventing the reoccurrence of the wrongdoing in the future, relative to the burdens the punishment implies for its recipient and the society imposing it. Punishment can be consequentially justified by both specific and general deterrence. Both are grounded in the idea that punishment makes the wrongdoing a less attractive behavioural option for would-be offenders, but specific deterrence denotes deterring the offender, whereas general

deterrence refers to deterring the wider public from engaging in similar wrongdoing. Incapacitation is another consequentialist punishment philosophy that simply prevents offenders from re-engaging in the wrongful behaviour by depriving them of the opportunity to offend (e.g., incarcerating offenders, or revoking their trading licence).

Yet, deontological and consequentialist principles may alternatively also be served by non-punitive (or less punitive) means. Indeed, a simple taxonomy of punishment philosophies may be obtained by combining deontological versus consequentialist goals and punitive versus "constructive" means (Table 13.1; Wenzel, Okimoto, Feather, & Platow, 2008). We call these means constructive as, compared to punitive means, their emphasis is on healing more than hurting, on enabling rather than incapacitating, and on the repair of human relations, including the offender. We have already discussed the philosophies that involve punitive means towards consequentialist goals (deterrence and incapacitation) and deontological goals (retributivism). Alternatively, the consequentialist goal of prevention of future wrongdoing could be pursued by constructive means in the form of offender rehabilitation, which commonly aims at enabling the offender to lead a normal, crime-free life by building capacity and opportunities while also providing structures of support and risk management (Fortune, Ward, & Willis, 2012). Second, deontological goals of advancing moral principles and restoring justice may also be pursued constructively through restorative justice (Wenzel et al., 2008). While certainly also having consequentialist goals (Braithwaite, 2002), the dialogue between affected parties as it is involved in restorative justice processes (Marshall, 1998; see Cohen, 2016, Chap. 14 of this handbook) provides "opportunities for norm clarification" (Christie, 1977, p. 8), repairing the moral damage by socially re-validating the values and norms that constitute our moral fabric (Wenzel et al., 2008). In its focus on retributive justice, the present review naturally emphasises research relevant to punitive responses to rule-breaking. However, as we will discuss later, an understanding of punitive

responses arguably also requires consideration of the non-punitive alternatives that humans perceive to have available to reach their goals.

Based on the idea that individuals have an understanding of punishment philosophies or goals, research shows that lay people and professional judges indeed differentiate in a measureable way between a number of philosophies representing the various punitive-consequentialist, punitive-deontological, and constructive notions distinguished above (De Keijser, van der Leeden, & Jackson, 2002). A considerable literature has tried to gauge public opinion about these philosophies (e.g., Cullen, Fisher, & Applegate, 2000) and used measurements of their differential endorsement in order to better understand the psychology underpinning punishment behaviour or punitive attitudes (e.g., Carroll, Perkowitz, Lurigio, & Weaver, 1987; Feather & Souter, 2002; McFatter, 1978, 1982; Orth, 2003; Oswald, Hupfeld, Klug, & Gabriel, 2002). For example, research has indicated that such philosophies may have some enduring trait-like component and are related to certain value preferences and ideologies as well as corresponding attributional tendencies to explain crime (Carroll et al., 1987; McKee & Feather, 2008; Sidanius, Mitchell, Haley, & Navarrete, 2006). However, they are partly also a function of an appraisal of the transgression in the given situation, including attributions of responsibility, controllability, and stability of the offending behaviour (Weiner, Graham, & Reyna, 1997) as well as the threat it poses to self or society (Hammer, Widmer, & Christian-Nils, 2009; Tetlock et al., 2007).

However, the fact that punishment philosophies or goals can be measured does not necessarily mean that individuals have correct insight in their punitive responses and the extent to which these are motivated by certain philosophies. For example, McFatter (1982), on one hand, imputed the weights participants implicitly attached to different punishment philosophies, based on their ratings of the appropriateness of a range of penalties for four different crimes and ratings of the penalties' utility for different punishment goals; on the other hand, he asked

Table 13.1 A taxonomy of punishment philosophies

		Means	
		Punitive	Constructive
Goals	Consequentialist	Deterrence	Rehabilitation
		Incapacitation	
	Deontological	Retributive justice	Restorative justice

participants to explicitly rate those same punishment goals. Among both lay participants and judges, retributivism (just deserts) was the most heavily weighted philosophy when deciding on the appropriateness of a penalty. However, lay participants explicitly rated special deterrence as most important and, for them (but not the judges), there was no significant correspondence between imputed weights and rated importance of punishment philosophies. Hence, individuals may not be fully aware of the importance they give to retributivist principles when determining a punishment response.

Alternatively, their explicit endorsement of certain philosophies may be affected by self-presentation concerns (Carlsmith, 2008). Accordingly, Carlsmith and colleagues (Carlsmith, 2006; Carlsmith, Darley, & Robinson, 2002; Darley, Carlsmith, & Robinson, 2000) argue that it might be a superior research strategy to infer individuals' preferences for different punishment philosophies from the factors and processes that determine their punishment decisions or recommendations. For example, Carlsmith et al. (2002) found that participants' punishment recommendations depended on situational factors that, conceptually, should affect just desert perceptions (seriousness of the offense, lack of mitigating circumstances), but not by factors that would be in line with a deterrence motive (low likelihood of detection, publicity of the crime/punishment). The just desert factors led to more severe punishment recommendations mediated by moral outrage. These and other findings suggest that participants' judgments and behaviour are predominantly driven by retributivism rather than deterrence or other consequentialist philosophies, like incapacitation (Darley et al., 2000). Indeed, Carlsmith (2006) tracked the information that participants successively sought

in order to make a sentencing decision for a hypothetical crime. Participants primarily sought pieces of information relevant to retributivism (e.g., magnitude of harm, intent) compared to information relevant to deterrence (e.g., prevalence of the crime) and incapacitation philosophies (e.g., offender's self-control). Further, information relevant to retributivism increased participants' confidence in their punishment recommendation significantly more than deterrence or incapacitation-relevant information did. Keller, Oswald, Stucki, and Gollwitzer (2010) modified the paradigm to avoid the non-interdependence of successively sought and obtained pieces of information; they also included a greater number of punishment philosophies. The result however was the same: retributivist information was prioritized.

Hence, while it has been found that individuals endorse—in the abstract—a variety of punishment philosophies, their behavioural responses in a concrete situation tend to be largely driven by retributivism (Carlsmith, 2008). As a consequence, what we say may show little correspondence to what we do; our societal discourse may be divorced from our true motivations. For example, Carlsmith and Sood (2009) report evidence that, in contrast to the prevailing consequentialist rhetoric around the use of harsh interrogation techniques for terrorist suspects, namely that they are necessary for security reasons, participants appeared to endorse these also as a means of retribution and revenge. It is possible that our responses to concrete transgressions are strongly affect-based, influenced in particular by the moral outrage that the experience or witnessing of an injustice causes in us, which in turn fuels our motivation to see justice restored (Darley & Pittman, 2003). Punishment responses may thus be much more emotional than rational, more

intuitive than reasoned; in fact, as Haidt (2001) argues, our moral reasoning may only be a post-hoc justification of our intuitive responding.

However, again, it may be misguided to completely discard our ability to reflect and reason on moral issues, including on the appropriate punishment of a transgressor. Instead, one could see both the intuitive (quick and automatic) responding as well as the rational and reasoned responding as psychologically valid and relevant to people's moral judgments and punishment behaviour. Oswald and Stucki (2009) suggest a two-process model of punishment where the two forms of responding work in succession: An initial intuitive response is heuristic and affect-driven and tends to be susceptible to biases (e.g., influenced by the severity of outcomes even if unforeseeable or only incidental to the transgression; Mazzocco, Alicke, & Davis, 2004). Depending on the perceiver's available cognitive resources and motivation (e.g., accountability), a second, reasoned, and analytical response, however, may override the intuitive response or correct for its biases (see also Lerner, Goldberg, & Tetlock, 1998). Further, however, one could argue that intuitions are not completely divorced from reasoned reflection, but are rather situated within a social context of norms, values, ideologies, and identities that individuals construe, at least partly, through conscious reflection and in social interaction (see also Tetlock, 2002). There may thus be more complex interactions between intuitive and reasoned processes in punishment responses that may warrant further investigation.

13.4 Retribution and Just Deserts

The reviewed research suggests that punitive responses to transgressions are largely driven by retributivism; that is, individuals seek punishment for offenders in order to repair or satisfy a sense of justice. Yet, how does punishment do that? What exactly does punishment achieve for it to be able to restore justice or give us satisfaction?

First, it could be argued that this is the wrong question; that retribution may not achieve any-thing for the individual seeking it and is not based on a cost-benefit analysis of its instrumentality. Rather, retribution may be a "deontic response" (Folger, Cropanzano, & Goldman, 2005): an end in itself, or moral necessity, felt as an urge and emotion (in particular, anger) that drives the action. As discussed earlier, this response may have developed through evolution as a mechanism to consequentially maximize survival, but has become a hardwired emotional response and moral dictate. This is consistent with the view that moral outrage is the key predictor of retribution responses (Darley & Pittman, 2003) and the perspective that our responses to wrongdoing are in the first place based on intuition and emotion (Carlsmith & Darley, 2008; Haidt, 2001). Indeed, the emotional response itself may have emerged due to evolutionary advantages as it may function as a way to communicate to the offender the immorality of their behaviour or elicit in them fear that deters them from repeating the behaviour (Folger et al., 2005).

However, distal evolutionary processes aside, what are the more proximal mechanisms that determine and maintain punishment responses? One possibility is that individuals tend to punish wrongdoers because it gives them an emotional reward: release of negative emotions, feelings of satisfaction, or increased mood. Indeed, De Quervain et al. (2004) found that during the decision to punish a wrongdoer brain regions are activated (the dorsal striatum) that are presumed to be involved in the processing of rewards towards goal-directed behaviour. Specifically, they suggest that the observed brain activity reflects an anticipated satisfaction that leads individuals to punish wrongdoers even when this is costly to them. However, research by Carlsmith, Wilson, and Gilbert (2008) questions whether individuals do correctly anticipate the implications of retribution for their affect. They found that participants expected to feel more positive and less negative after they, or a third-party, would have punished a transgressor who had victimized them. In fact, however, witnessing a third-party punish the transgressor did not improve participants' affect compared to a no-punishment control condition; and instigating the punishment

themselves made participants actually feel *worse*. The finding that such an affective reward does not eventuate casts doubt on this being the proximal mechanism that reinforces and maintains retributive responses. Indeed, research by Gollwitzer and Bushman (2012) suggests that mood improvement is not a motivation for retributive punishment. While participants were less likely to vent their anger when they were made to believe that their mood was "frozen" due to a pill they have taken, or when they believed their mood would improve by visiting a "good mood room," their choice of retributive punishment for a blameworthy transgressor was not affected by this (unless explicitly instructed to focus on their feelings; Study 3). Mood improvement does not seem to be the reinforcer or goal of retribution.

Nonetheless, it is still highly plausible (if not tautological) to assume that individuals engage in retribution because the behaviour is rewarding. An alternative perspective may focus on the perception of deservingness and the cognitions underlying it. Feather (1999), for example, proposes a balance theoretical model of deservingness, where the consistency of positive and/or negative relations between entities, and how they are linked or not linked with another, determines whether a punishment (or a positive or negative outcome generally) is deserved or not. While there is no direct evidence that cognitive consistency is indeed the motivating force, this conceptualization has shown considerable heuristic value. First, deservingness has been shown to be a central predictor of punitiveness, satisfaction with punishment or, conversely, sympathy with an offender. Second, offence-related cognitions (notably seriousness and offender responsibility), ideologies, and value priorities, all of which affect relations in the balance model, have been shown to affect deservingness perceptions (e.g., Feather, 1996, 1998; Feather & Souter, 2002). Interestingly, the role of deservingness extends to negative outcomes that may have befallen another person by circumstance and the pleasure that individuals may experience in such situations (*Schadenfreude*; e.g., Feather, Wenzel, & McKee, 2013).

However, this raises the interesting question of whether, following a wrongdoing, an inciden-

tal negative outcome happening to the offender would satisfy us as much as a punishment imposed in clear response to the wrongdoing. Putting it another way, are punishments satisfying because of the mere (deserved) suffering of the offender? Several theoretical perspectives seem to argue so: An offender's suffering, even if accidental or incidental, should increase cognitive balance underlying judgments of deservingness (Feather, 1999), as discussed; it should add a negative outcome to an input/outcome ratio that helps to restore equity between victim and offender (Austin, Walster, & Utne, 1976); and it should help maintain the view that bad people get bad outcomes and good people good outcomes, restoring a belief in a just world (Lerner, 1980). From either theoretical perspective, the offender's suffering per se should increase satisfaction. Indeed, there is evidence that an offender's fateful harm decreases the punishment observers want to impose (e.g., Austin, 1979). Further, observers engage in immanent justice reasoning and tend to construe a causal link (even where objectively there is none) between an offender's misdeeds and an unrelated negative outcomes he/she experiences, which portrays the outcome as deserved punishment and should serve to maintain their belief in a just world (e.g., Callan, Ellard, & Nicol, 2006).

However, research by Gollwitzer and colleagues indicates that from a victim's perspective the offender's suffering per se is not satisfactory. For example, in Gollwitzer, Meder, and Schmitt's (2011) Study 3 participants had the opportunity to take revenge on a transgressor, who had suggested a very lop-sided split of raffle tickets at the participants' cost: participants could in turn deduct raffle tickets from their partner. Further, they received a message from their partner that either expressed understanding that they might decide to deduct raffle tickets because of the unfair division that the partner had suggested, or it expressed no such understanding, with the partner not seeing that the participant had the right to deduct tickets. The participants who decided to take revenge indicated a greater level of satisfaction compared to those who chose not to take revenge, but *only* when the partner under-

stood this as a response to their transgression. Gollwitzer and Denzler (2009) used an implicit measure of goal-fulfilment to draw similar conclusions. Furthermore, Funk, McGeer, and Gollwitzer (2014) showed that, in order for victims to feel satisfied, the transgressor needed to understand their suffering not only as punishment for their behaviour, but rather as a *deserved* punishment that made them realize the wrong and commit to change their behaviour.

These findings indicate that retribution (at least from the victim's point of view) is not about the balancing of scales per se, but rather about communicating to transgressors the wrongfulness of their actions and re-educating them (Duff, 2001; Hampton, 1984; Heider, 1958). Victims feel more satisfied when the offender gets the message. More generally, then, the proximal mechanisms that maintain retribution as response tendency lie in its effectiveness as a communication. Interestingly, from this perspective the distinction between deontological and consequentialist justifications of punishment tends to dissolve. The moral dictate of punishment depends on the punishment making the offender understand the immorality of their behaviour; in other words, justice is restored by the offender re-committing to the values that underpin it (Wenzel et al., 2008). However, this still leaves the question why punishment would need to be the vocabulary in which to put the message. Are there not also other, more constructive means of communicating censure of an offender's actions and need to change? Perhaps this is a matter of what exactly punishers wish to communicate, and to whom. What this all implies, however, is that retribution has symbolicmeaning and is chosen to address concerns that the transgression elicited in the punisher.

13.5 The Symbolic Meaning of Punishment

If retribution has symbolic meaning, which meanings exactly does it convey? Much of the recent work in the retributive justice literature suggests that punishment serves to protect against symbolic (and sometimes actual) threats to (a) an individual's feelings of status, power, and control, and (b) shared social values. In the next sections, we review the research relevant to these psychological concerns, describe their empirical association with self- and identity-enhancement, and discuss the role of punishment in alleviating the threats that a wrongdoing can pose to each of these fundamental motivations.

13.5.1 Status, Power, and Control

Offenders make a symbolic statement about the status and power relations between themselves and their victims when they violate agreed-upon rules, norms, and laws. Specifically, when an offender intentionally acts without regard for a victim's individual rights or freedoms, offenders symbolically place themselves above their victims (i.e., status), while at the same time disturbing the power relations between the two parties (Heider, 1958; Miller, 2001; Murphy & Hampton, 1988; Vidmar, 2000; Vidmar & Miller, 1980). For example, by breaking into your house and stealing your valuables, the actions of a burglar not only rob you of your deserved material outcomes, but also take on symbolic meaning, raising questions about the victim's self-determination and feelings of control (hence why robberies are so psychologically damaging, even when insurance absorbs the cost of material losses). Such symbolic diminishing or disempowerment of the victim is a consistent theme in the literature; and although issues of status, power, control, and autonomy are distinct, particularly in the extent to which they concern social relations and influence, they represent one family of concerns in the context of victimization (Thye, Willer, & Markovsky, 2006).

As a consequence of this symbolic threat to status/power, people often seek justice responses that empower victims and attempt to repair the relative balance of status/power between victim and offender, an idea that is explicated in a number of theoretical models. Justice Restoration Theory (Okimoto & Wenzel, 2008; Wenzel et al., 2008) argues an injustice victim may experience

status/power threats as a result of victimization, and these threats motivate desires for retributive responses that degrade the offender and thus repair the relative status hierarchy between the two parties. For example, when a terrorist attack was framed as diminishing national status/power, respondents were more likely to endorse extreme punishment of the offenders and denial of due process (Okimoto & Wenzel, 2010). Similarly, self-reported concern for national status/power predicted support for retributive responses to terrorism (Okimoto, Wenzel, & Feather, 2012, Study 2; see also Wenzel, Okimoto, & Cameron, 2012). The Needs-Based Model of Reconciliation (Nadler & Shnabel, 2008; Shnabel & Nadler, 2008) also emphasises the importance of status/power repair for victims of injustice. According to this model, victims' willingness to reconcile is dependent on restored feelings of empowerment. At their core, these frameworks emphasize the importance of restoring the equitable balance of status and power to the victim-offender relationship (Bies & Tripp, 1996), a symbolic goal that can be achieved through retribution.

More recent empirical work extends the relevance of status and power concerns beyond the victim-offender dyad. Victims of an injustice may also be concerned with their status in the broader social community (i.e., status in the group; Lind & Tyler, 1988). Retribution can serve to address this group status threat by communicating the broader community's concern for the victim. In a series of studies, Okimoto and Wenzel (2011) found that third-party punishment increased victims' feelings of status in the group, but only when that punishment came from a valued ingroup authority. Status/power concerns also extend beyond the victim perspective. Van Prooijen and Kerpershoek (2013) found that retributive reactions were stronger when respondents' autonomy motivations were higher (both chronic and situational). In this case, punishment helps to address the autonomy needs of third-parties by reinforcing societal systems that protect individual autonomy.

Further evidence for the role of status/power motives in punishment can be found in research linking retributive tendencies to individual profiles that emphasize concern over personal status, power, and self enhancement more broadly. First, personal value priorities (Schwartz, 1996) of self-enhancement and power have been associated with retributive reactions to injustice (Feather, 1996; Wenzel et al., 2008). In particular, individuals with high power values (i.e., self-enhancement) are more likely to conceptualize justice as requiring punishment (McKee & Feather, 2008; Okimoto et al., 2012). Second, people high in right-wing authoritarianism (RWA; Altemeyer, 1996) are more punitive than those low in RWA (e.g., Feather, 1996, 1999; Feather, Boeckmann, & McKee, 2001), particularly the aggression dimension of RWA that captures a dispositional preference for aggressive responses to status/authority violations (McKee & Feather, 2008; Okimoto et al., 2012). Similarly, people high in social dominance orientation (SDO; Sidanius & Pratto, 1993) are more punitive than those low in SDO (e.g., Mitchell & Sidanius, 1993; Sidanius, Liu, Pratto, & Shaw, 1994), particularly among individuals valuing group-based dominance (Gerber & Jackson, 2013; McKee & Feather, 2008; Okimoto et al., 2012). Third, retributive tendencies are also associated with sub-clinical narcissism (Raskin & Terry, 1988), a personality profile indicative of self-enhancement and ego-protection. Narcissistic individuals are more likely to react to victimization with aggression (Bushman & Baumeister, 1998), demand compensation (Bishop & Lane, 2002), seek retributive forms of justice (Okimoto et al., 2012), and withhold forgiveness (Exline, Baumeister, Bushman, Campbell, & Finkel, 2004). All of these individual-level constructs involve heightened concern over power and/or an affinity for respecting status and hierarchy, and all of them are linked to heightened retributive responses to injustice.

13.5.2 Social-Moral Values

By violating agreed-upon rules, norms, and laws, offenders also make a symbolic statement about the values underlying those behavioural dictates.

By intentionally ignoring supposedly agreed-upon expectations of conduct, offenders symbolically undermine the community consensus about what is fair and just (Durkheim, 1964; Tyler & Boeckmann, 1997; Vidmar, 2000), questioning the validity of supposedly shared values underlying the violated entitlements (Wenzel, 2002). For example, by breaking into your house and stealing your valuables, the actions of a burglar may also take on symbolic meaning for the community in which you live, raising questions about the extent to which beliefs about respect for individuals are indeed shared in the community and define its identity.

The violation of behavioural norms, particularly distributive or reciprocity norms, not only introduces uncertainty about the cooperative social exchange within a group (Shinada, Yamagishi, & Ohmura, 2004), but also uncertainty about the value consensus underpinning their social identity (Haslam, McGarty, & Turner, 1996). Consensual values within a social group help to define its distinctive identity and bind people together in a cohesive unit (Hogg, 1993; Turner, 1987). Thus, for individuals whose identity is defined by their membership in the group in which the transgression occurred, the transgression may produce uncertainty about the extent to which identity-defining values are shared (Huo, 2003; Wenzel, 2002), constituting a threat to their social identity (Wenzel et al., 2008). Importantly, although often discussed as an internal motivation to protect the integrity of the ingroup, it is likely that such reactions are also driven by external motivations to *present* the ingroup in a positive light (esp. as moral; Leach, Ellemers, & Barreto, 2007). In other words, the identity threat may arise both from internal concerns about the identity of the group, and/or from more external concerns over how people outside the group will see and evaluate the group in light of the transgression (Okimoto & Wenzel, 2014).

However, individuals may still find self-relevance in a violation even in cases where the affected values seem to transcend the community shared with the offender. That is, their response may be driven by broader moral imperatives that can drive retributive action when moral integrity represents an essential aspect of one's self-definition (i.e., moral identity; Aquino & Reed, 2002). Stated differently, individuals may see their self-concept as integrally linked with specific moral values, creating a sense of moral conviction toward protecting those values and producing a mandate for action when they are perceived to be under threat (Skitka, Bauman, & Mullen, 2008). For example, moral mandates to see justice meted out can lead people to judge an offender's punishment as fair irrespective of whether or not that punishment was achieved through fair judicial procedures (Skitka & Houston, 2001). Again, the moral identity threat may stem from internal concerns about actually being a moral person, or from external concerns about representing oneself as a moral person (see Aquino & Reed, 2002). In sum, moral self-relevance of a violation may also elicit value reinforcement goals, but value reinforcement in the service of one's personal identity as a moral individual rather than value reinforcement in the service of an affected ingroup.

Importantly, the relative importance of value reinforcement goals is partly determined by the salience of an individual's social and/or moral identities (Skitka, 2003). For example, individuals high in self-reported moral identity are more likely to act morally when primed with situational salience of that identity (Aquino, Freeman, Reed, Lim, & Felps, 2009), including intervening in response to an injustice (O'Reilly & Aquino, 2011). Likewise, Justice Restoration Theory (Wenzel et al., 2008) argues that the centrality of a social identity for one's self-concept determines the importance of group-directed value reinforcement goals in the pursuit of justice.

Numerous studies in support of this model have shown that individuals perceive transgressions as a greater threat to shared values when the offender is an ingroup versus outgroup member (De Castella, Platow, Wenzel, Okimoto, & Feather, 2011; Okimoto & Wenzel, 2010), when that ingroup has a more cohesive identity (Wenzel, Okimoto, Feather, & Platow, 2010), when the respondent strongly identifies with that ingroup (Okimoto & Wenzel, 2010; Okimoto, Wenzel, & Feather, 2009), or when the respon-

dent is high in interdependent self-construal (Gollwitzer & Bücklein, 2007; Okimoto et al., 2012). Research on the Black Sheep Effect (Marques & Paez, 1994) also shows that people are more punitive toward ingroup violators than outgroup violators if the violation threatens identity defining values (e.g., Kerr, Hymes, Anderson, & Weathers, 1995), but only when the immoral status of that offender is made clear by their unambiguous guilt (Van Prooijen, 2006) or recidivism (Gollwitzer & Keller, 2010). However, it is worth noting that this is a complex process. Sharing a relevant identity with an offender can affect an individual's punitiveness in at least three different ways (Okimoto, Wenzel, & Platow, 2010): (1) reducing offender blame attributions (Van Prooijen, 2006); (2) increasing the perceived value threat associated with the violation, making the value reinforcement motive more salient (Kerr et al., 1995; Wenzel et al., 2010); and (3) leading the perceiver to seek more constructive and less punitive means for reinforcing those values (Okimoto et al., 2010; Okimoto & Wenzel, 2009). In sum, although succinctly described as being determined by the salience of personal, social, or moral identities, this process is by no means simple; identities are dynamic, changing in reaction to transgressions and potentially influencing an individual's retributive motives at multiple points in the cognitive/affective process.

Regardless of the psychological mechanism (e.g., social or moral identity) underlying individual concern over shared norms/values, this discussion implies that their intentional violation will demand some response that attempts to regain consensus and reassert the validity of the values threatened by the offense. Retribution serves this justice goal by psychologically (and actually) distancing the deviant offender from the social group in which the offense occurred. Distancing the offender from the group through sanctions (which often involve some form of social exclusion or stigmatization) signals that the offender is an anomaly whose values are not indicative of the group as a whole, making it easier to maintain a positive social identity (Marques & Paez, 1994). Through exclusion of the offender from the group,

punishment reaffirms the violated values towards the *wider* group or community (Okimoto & Wenzel, 2009; Vidmar, 2002). Indeed, Tyler and Boeckmann (1997) found that, rather than motivated by concerns about safety, public support for strict punitive sentencing is driven by their belief that societal values have become eroded, and that punishment helps to solve this problem. It can be argued that punishment can only assume such a function if it is sufficiently public and visible to the group; thus, a preference for visible (rather than invisible and private) retribution should indicate an underlying motivation to reaffirm values to the wider group. Consistent with this argument, Okimoto and Wenzel (2009) found that participants' concern with restoring values toward the group (both self-reported and primed) predicted their assignment of more visible punishment interventions and, conversely, experimental manipulations of visibility resulted in greater perceived value communication toward the group.

Notably, however, utilizing retribution to communicate a broader message about the values of the group often ignores the source of the value threat itself: the offender. It is perhaps possible to execute punishment in a way, so retribution can also serve to enforce or educate the offender about the importance of the violated values. Rather than excluding the offender, constructive punishment would need to allow the offender a way back into the group, by showing their penance and endorsement of shared values. Okimoto and Wenzel (2009) indeed found that participants' concern with restoring values towards the offender (both self-reported and primed) predicted their assignment of punishment interventions that allowed offenders to prove themselves through good behaviour and service to the group. Also, experimental manipulations of such reintegrative forms of punishment resulted in greater perceived value communication toward offenders. By reframing retribution in this way, punishment assumes some qualities of restorative justice (see discussion below) that moves towards shared value consensus with the offender, rather than simply consensus in the broader group irrespective of the offenders' views (see also Gromet & Darley, 2009; Orth, 2003).

Importantly, this entire body of work raises an important point that critically qualifies the research reviewed earlier in this chapter. In many cases, retribution is *not* an end in itself, but rather a means to achieve a specific goal. Retribution serves and is partly motivated by more fundamental psychological needs, needs that may be satisfied by one form of punishment better than another—but that can also be satisfied by other, non-retributive interventions. Thus, a more complete understanding of the retributive impulse requires recognition that punishment is not the only option for justice repair.

13.5.3 Moving Beyond Punishment

One of the complexities of understanding retribution, but one that is not yet well understood, is the interplay between punishment and other forms of justice repair. Most of the research we have reviewed focuses on a single punitive outcome without considering the real response options available, although there are notable exceptions. For example, compensatory justice, which focuses on repairing the harm done by the transgression (Mullen & Okimoto, 2014), is a realistic response that may be considered as a supplement and/or alternative to retributive justice. In an extension to the altruistic punishment paradigm described earlier, allowing participants the option to also engage in altruistic compensation resulted in greater personal expense being invested in victim compensation rather than offender punishment (Lotz et al., 2011), patterns of behaviour that appear to serve both internal feelings of empathy toward the victim (Lelieveld, van Dijk, & van Beest, 2012) and external desires to exhibit oneself as empathetic (Lotz et al., 2011). Such compensatory actions can also have outcomes similar to punishment. Third-party provision of compensation has been shown to effectively improve the victim's feelings of status in the group (Okimoto, 2008; Okimoto & Tyler, 2007) and to help promote a more benevolent reputation than punishing alone (Adams & Mullen, 2013). However, the lines between punishment and compensation can become blurred when con-

sidering involuntary forms of compensatory retaliation against the offender, such as theft (Greenberg, 1997), or other compulsory monetary transactions (Van Prooijen, 2010).

Forgiveness is another alternative response to seeking punishment, typically defined as the transforming of the victim's attitudes and motivations toward the offender from negative to positive, which involves the sacrificing of retributive justice (Exline & Baumeister, 2000); forgiveness is even measured in part by the absence of retributive impulses (McCullough et al., 1998). However, rather than seeing these two responses as mutually exclusive alternatives, punishment can also be considered a means to reach forgiveness, effectively reducing the "injustice gap" between actual and just treatment to a level where forgiveness becomes palatable (Exline, Worthington, Hill, & McCullough, 2003). Notably, although punishment can achieve justice and thus advance the likelihood of forgiveness (Strelan & Van Prooijen, 2013), justice reached through retribution is less likely to engender forgiveness compared to other, more constructive forms of justice repair (Wenzel & Okimoto, 2014). Conversely, forgiveness can itself be a means to restoring justice and can thus reduce the desire for retribution; like punishment, the act of forgiveness can serve underlying justice goals by empowering the victim and expressing renewed commitment to important values (Wenzel & Okimoto, 2010, 2012). Thus, rather than being response alternatives, punishment and forgiveness influence each other in the dynamic process of justice repair.

A third and final response alternative that has important implications for our understanding of retribution is the emerging domain of restorative justice. In philosophy, while retributive justice involves the unilateral administration of subjectively appropriate punishment, restorative justice involves constructive dialogue between the involved parties with the goal of collective agreement about justice resolution (Braithwaite, 2002; Wenzel et al., 2008). In practice, restorative justice techniques are quite diverse, but typically involve interaction between the parties and may include the opportunity for apology, amends, for-

giveness, and reintegration (Christie, 1977; see also Cohen, 2016, Chap. 14 of this handbook). Although punishment is able to address the psychological concerns over value consensus (as discussed earlier), the salient value reaffirmation motive increases a preference for and satisfaction with more restorative approaches to justice (e.g., Wenzel et al., 2010). Also, the value placed on maintaining the constructive interpersonal bonds with the offender makes restoratively oriented approaches to justice a more attractive option than retribution is for reconsensualizing shared values, as restorative justice reaffirms values *with* the offender rather than *in spite of* him or her (Okimoto et al., 2010; Wenzel & Okimoto, 2012). Thus, restorative justice may offer an acceptable (and sometimes even preferred) alternative option to retributive justice. Notably however, as with the other alternative responses discussed above, the realistic and likely most effective route to justice may involve a nuanced blend of restorative and retributive approaches (Gromet & Darley, 2006).

Our discussion of these burgeoning domains of research is by no means comprehensive; we only offer a small sample of the research findings to illustrate the point that punishment does not hold a monopoly on justice, nor is it necessarily the most effective or even the most "just" way to respond to a transgression.

13.6   Conclusion

As we have reviewed in this chapter, the tendency to seek retribution as a response to interpersonal and intergroup transgressions is deeply ingrained, having evolutionary origins that are also tied to fundamental psychological needs. But despite recognizing the prevalence and widespread importance of punishment for maintaining a positive sense of self and identity, and a broader sense of social order (both symbolic and actual), the retributive justice literature still largely fails to integrate punishment with other forms of justice, focusing instead on retribution in isolation. Although the foundational work reviewed in this chapter offers critical insight into retribution as a

justice motive, we as justice scholars must move beyond punishment to a broader conceptualization of what is required in response to injustice. What is thus called for is not separate chapters outlining our understanding of retribution and restoration, or even the related constructs of forgiveness, apology, compensation, revenge, etc.; rather, we call for an *integrated* understanding of justice responses, one that transcends traditional distinctions between "different" justice remedies, instead recognizing the fluid and multifaceted nature of justice repair. We also call for foundational research that can form the catalyst for institutional change. Despite acknowledgement by many in the social sciences that punishment is, in isolation, typically not the most effective response to injustice, retribution continues to be pervasively institutionalized in many cultures and legal systems. Why does society continue to rely on punishment as the authority for social and moral order? What are the psychological, sociological, and institutional barriers that prevent the evolution of the systems meant to protect our communities and the values they hold dear? If social justice researchers wish to further advance the *just* dispensation of punishment, we must understand the role of retribution as one piece of a broader suite of corrective action, while also appreciating the institutional systems that sustain its dominance as a means to achieve justice.

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Restorative Justice

14

Ronald L. Cohen

14.1 Introduction

"Restorative justice practices" can be situated in several different landscapes of concern. It is, perhaps, most often contrasted with "retributive justice" as one way of distinguishing among different ways of thinking about and responding to social and legal wrongdoing (see Wenzel & Okimoto, 2016, Chap. 13 of this handbook). Though the distinctions between the two may be less clear than it is sometimes assumed, it is clear that "retributive justice" focuses primarily on the offender and the just punishment he/she deserves, while "restorative justice" focuses primarily on "restoring" just relations among victim, offender, and community.

Both "restorative" and "retributive" justice standards are invoked and applied at interpersonal (both dyadic and triadic), intergroup, and international levels of analysis. When applied systematically at the international level, one primary distinction often drawn is that between "trials or tribunals" on the one hand, and "truth commissions" on the other, (e.g., Minow, 1998) though both at times address compensation to

victims (what is sometimes called "compensatory justice"). Restorative practices are also often discussed in work on "transitional justice," attempts by newly reconstituted polities to address injustices during the periods in which they are emerging, or have recently emerged, after defeating a previous, discredited regime. Perhaps the most widely cited example is the Truth and Reconciliation Commission that emerged in South Africa after the fall of the Apartheid government.

They are also the focus of a growing body of theory and research in a wide range of scholarly fields, including a recently launched international journal, *Restorative Justice* (Aertsen, Walgrave, Vanfraechem, Parmentier, & Zinsstag, 2013) that inform a range of formally institutionalized and informal social practices. All such practices involve face-to-face interaction among parties in which each provides a memory-based narrative of the harm in a ritualized procedure in an attempt to create a shared understanding of what happened and why, and to craft a resolution of that conflict and how to address it, presently and in the future.

A great deal of work relevant to these practices addresses fundamental psychological and social–psychological factors that affect participants and members of the wider public. Some of that work will be discussed here, but I will focus on the role such factors have in the context of

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restorative practices at the meso (small group and community) and macro (state) levels of analysis. Work on those fundamental processes will be employed primarily to interpret the role of three essential characteristics of the practice: *narrative*, *memory*, and *ritual*.

Formally constituted restorative practices assume (1) that all parties have been informed of the practice and the goals it is intended to achieve (2) that there is a shared understanding of them and (3) that they have agreed to abide by them. Participation by all parties is assumed to be voluntary, though in some settings those perceived to have produced the harm might face legal sanctions for not participating, or for failing to satisfy these conditions (for example, admitting their "responsibility" for the harm). These practices are similar to those evident among participants in mundane social interaction in which a norm or value has been violated.

However, if an offender's acknowledgment of responsibility is required to participate in restorative practices (as is the case in many instances), and if doing so eliminates or reduces his criminal liability, others might suspect (and the offender might even acknowledge) the acknowledgment was simply a strategic one. Offenders who participate in restorative practices under these conditions have forfeited the right to a presumption of innocence. Thus, their participation may be similar to that of criminal defendants who accept "plea bargains" to reduce their penalty. Publicly accepting responsibility in exchange for reduced punishment (akin to a plea bargain) may leave victims and community members uncertain about its "authenticity." Little in the restorative justice literature acknowledges distinctions among causal, legal, and moral responsibility, and the possibility that offenders, victims, and community member participants understand an offender's acceptance of responsibility differently can cause problems.

In the course of everyday interaction, one party may judge that another has violated what are assumed to have been shared normative standards. Such an assumption can be described as a tacit agreement about "whose claims concerning

what issues will be temporarily honored," and where the violation threatens to undermine a "real agreement concerning the desirability of avoiding an open conflict of definitions of the situation." (Goffman, 1959, p. 10) If the offender acknowledges the violation and apologizes, the victim will often accept the apology or make light of the offense. Failure to recognize or to satisfy another's claim to have been harmed will often sound a "false note" to which participants' attention will be called.

Actions that are or appear to be inconsistent with the tacit agreement create a potential for conflict. To the extent justice practices are established to prevent, moderate, or minimize conflict, restorative justice practices are intended to resolve it to the satisfaction of the participants. When such conflicts cannot be resolved in dyads, third parties might be called on to assist in crafting a resolution or might decide for any one of a number of reasons (including that they are legally required) to provide such assistance.

Social life proceeds as though there were a shared agreement about its normative foundation, including the conditions under which and how disagreements that emerge should be addressed. Addressing them requires accessing the norm and the violation through memory and "subjective" description and evaluation of the past expressed in narrative form. Whether the two narratives are consistent or not, the process of addressing them is likely to take a ritual form. Narrative, memory, and ritual are compressed in everyday social interaction, but more clearly identifiable in restorative justice practice at the meso and macro levels.

In what follows, I intend to demonstrate the importance of narrative, memory, and ritual at each of the three levels of analysis. Though in different ways, restorative practices describe the way *narratives* of interpersonal or collective harm, based on *memories* of the harmful events and produced by victims, offenders, and community members, and according to an agreed-upon *ritual* that can establish or reestablish a shared sense of justice.

14.2 Micro-Level Processes

The role of memory, narrative, and ritual may be obscured in micro-contexts in which versions of this sequence occur frequently and even nonconsciously in abbreviated fashion. Everyday norm violations may go unnoticed, noticed but ignored, or noticed and resolved "routinely."[1] In a dyadic interaction among strangers in public, for example: (1) one actor violates a tacit agreement about "whose claims concerning what issues will be temporarily honored;" (2) the violator or the other actor acknowledges (calls attention to) the violation; and (3) one or both actors attempt to resolve the conflict. Restoration occurs regularly in a ritually sequenced form: offense, acknowledgement, conciliation (e.g., apology), and acceptance.

Evidence for the occurrence of such sequences can be found in work on "civil inattention," an apparently widely shared norm. Each actor in public settings implicitly agrees not to display inappropriate interest in copresent others' activities and appearances (Smith, 2011). Violating such a norm may require implicit or explicit forbearance by both actors, so that each conveys to the other a temporary suspension of the norm. Goffman (1971/2010) suggests that actors present in a space and already engaged in interaction possess a "conversational preserve," a right to exert some control over who can summon him into talk and when he can be summoned, and the right of a set of individuals once engaged in talk to have their circle protected from entrance and overhearing by others (p. 40). Such a norm of civil inattention might be relaxed when strangers or newcomers appear interested in joining (Pillet-Shore, 2010; see also Wesselmann, Cardoso, Slater, & Williams, 2012).[2]

Though such routines may occur in the absence of a third party, they always involve mutually interdependent understandings and actions. We are able to enact these routines and may often do so nonconsciously, to reestablish, recover, and reinforce—to the extent possible—a previously shared normatively based social order. Much of what is likely to transpire in dyadic interaction will involve nonverbal behavior, in part because the moments are "fleeting" (though this might be less likely when they involve actors already known to each other). That very fact is consistent with the claim that these reactions do not necessarily depend on cognitively mediated processes, and that they might have evolutionary roots. For example, evolutionary accounts can contribute to understanding how "appeasement displays" may decrease the likelihood of future conflict among human and nonhuman primates (e.g., Baumard, André, & Sperber, 2013; McCullough, Kurzban, & Tabak, 2013; Petersen, Sell, Tooby, & Cosmides, 2012; Pierce & Bekoff, 2012).

A good deal of experimental research demonstrates that offenders and victims in these instances both experience, and are believed by others to experience, moral emotions such as embarrassment, guilt, shame, anger, outrage, and disgust; recent research suggests that regret may have similar effects (Imhoff, Bilewicz, & Erb, 2012). Despite differences among these emotions (e.g., Keltner, 1996), and the specific role that shame is thought to play in restorative justice (Braithwaite, 1989), research on these negative moral emotions is important for understanding the processes involved in restorative practices.

For example, Stearns and Parrott (2012) had participants read a prepared narrative ("an autobiographical vignette") in which the author described doing something wrong and experiencing either guilt or shame, or no emotion. Authors who expressed feelings of guilt or shame elicited more positive evaluations of moral motivation and social attunement than did those who did not report an emotion. In a second study, a narrator who reported experiencing a desire to apologize (guilt) or feelings of worthlessness (private

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[1] That is, frequently, informally, and without much conscious effort. I will argue later that restorative practice is better understood as a ritual.

[2] Lovett, Jordan, and Wiltermuth (2012) have recently validated a "Moralization of Everyday Life" scale designed to assess moral judgments of everyday behaviors.

shame) elicited more positive impressions than one who reported reputational concerns (public shame) or a lack of any of these feelings.

Research on embarrassment suggests that physiological reactions such as blushing can improve the image victims have of offenders. In addition, it may enable offenders to avoid subsequent social exclusion (Dijk, de Jong, & Peters, 2009). Other recent research (Dong, Huang, & Wyer, 2013) asked people to recall and then provide a lengthy (8 min) narrative of a situation in which they had experienced embarrassment, or to provide an equally long narrative of a typical day. The former were more likely than the latter to engage in efforts to "save face," expressing greater attraction to objects (sunglasses) that symbolically hide and symbolically restore (a facial cream described as having a "restorative effect") the face. This result further suggests the importance of metaphorical links between physical and psychological referents, an issue addressed by work on moral metaphors of reconciliation (e.g., Seu & Cameron, 2013)

In a series of studies, Feinberg, Willer, and Keltner (2012) found that participants who displayed more intense embarrassment ("gaze aversion, smile controls and inhibition, downward and sideways head movements, and sometimes nervous face touching and laughter" p. 85) when describing an embarrassing episode were more likely to describe themselves as prosocial, and to act prosocially. In addition, observers inferred prosociality from a person's displays of embarrassment and said they were more willing to affiliate with and trust those who expressed it. Finally, Nelissen (2012) demonstrated that people administered strong shocks to themselves when in the presence of someone they had failed to help earn a reward, but not when in the presence of someone they had not encountered previously, or when they were alone. This suggests that guilt-induced self-punishment can serve as a social signal of remorse.

Little of this research focuses explicitly on the role of memory, narrative, or ritual in restorative practice. When it does, some researchers have argued that recalling a past experience that elicited embarrassment or (shame, guilt, outrage,

etc.) would "re-elicit the feelings that had accompanied the experience originally." (Dong, Huang, & Wyer, 2013). Such a possibility is implied in restorative practices, as the narratives victims and offenders exchange are unlikely to be simple recitations of an event. Instead, they are likely to include a re-elicitation of the emotions that accompanied it, and it is the public "re-display" of those emotions that is central to the ritual character of the practices.[3]

One line of continuing research on dyadic interaction that focuses explicitly on memory, narrative, and ritual examines conversations between Jo Berry, whose father was killed in an IRA bombing, and Patrick Magee, who planted the bomb. As is the case for much of the work on meso-level and macro-level restorative practices (addressed in Sects. 14.3 and 14.4 below), work on these conversations was guided by quite different traditions (work on metaphor, dialogue, and discourse). It also differs from that work in that the conversations themselves were initiated by the victim, accepted by the offender, and did not include a third party.

Cameron (2007) analyzes the metaphors of reconciliation and empathy employed by the two in their conversations over a 2-year period. Metaphors were considered likely to play an important role because face-to-face conversations about these issues are likely to rely on indirectness and analogy (p. 198). Four major metaphor groupings were identified: *journeys* involving their past individual trajectories and joint trajectory over the course of their discussions; *connection*, as in building bridges and breaking down barriers; *seeing more clearly* by correcting a deficient and partial image of the other to a more complete one; and *listening to a [the other's] story*.[4] The process is later described as empathic mutual positioning in which "both speakers offer and facilitate for each other the

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[3] Restorative processes at this level resemble "plea bargains." An offender admits a violation in exchange for escaping any more than the minimal penalty of acknowledging error.

[4] Bruneau and Saxe (2012) have recently documented the importance of the experience of "being heard."

taking up of positions that are difficult and painful for themselves and move together to a different understanding and joint meaning making." (Cameron & Seu, 2012, p. 276) Very similar themes and metaphors are recognizable in meso-level and macro-level restorative practices.

14.3   Meso-Level (Triads)

Research on the experience, display, and signal functions of moral emotions at the micro-level thus supports claims advanced by restorative justice theorists about the moral emotions likely to be evoked in both an offender and a victim. Important as this evidence is, restorative justice practices involve relations among an offender, a victim, and a community, and this triadic relation is often not addressed directly. For example, in reacting to a victim, people may be interested in both restorative and retributive justice and considering both may be difficult. Because restorative justice practice focuses on harm, observers may be more attentive to the victim than the offender.

Recent research on observers' punishment decisions demonstrates that observers are concerned to address both the victim's harm *and* the offender's apparent challenge to group values and the likelihood of re-offense (Gromet, Okimoto, Wenzel, & Darley, 2012). Observers recommended less severe punishments for offenders whose victims expressed greater satisfaction with restorative procedures. This might suggest that observers interpreted victims' expressed satisfaction as an indicator of their offenders' reaffirmation of shared group values, and thus lessened the perceived need for further punishment. However, the observers here play a very different role than members of the community who participate directly in restorative justice. Though the latter are likely to be influenced by the victim's reaction, they also will have had *direct* access to the offender's behavior, and to the victim's reaction to the offender's behavior. Interviews with crime victims who participated in various forms of restorative justice practice Van Camp and Wemmers, (2013) revealed the

judgment that they were procedurally just. However, beyond that, victims mentioned the importance of restorative practices being flexible, providing care, focusing on direct dialogue, and allowing prosocial motives to be addressed.

These possibilities might be considered in light of Kraus and Keltner's research (2013) on the roles that class and essentialist beliefs may play in support for restorative as opposed to retributive justice practices (p. 258). Previous evidence suggesting a negative relationship between social class and contextual explanations is consistent with the idea that retributive punishment holds individuals personally responsible for their violations, whereas restorative punishment seems to acknowledge the important effect of contextual forces.

Research and theory incorporating the triadic nature of restorative justice practice (Cohen, 2013) reveals additional complexities. Not only do restorative practices require face-to-face contact between victim and perpetrator; such contact is meant to occur under the protective cover of safety provided by the community … [and] is thought to provide the context in which the legitimate needs of the offender, victim, and community are most likely to be met (Cohen, 2001, p. 212).

This requires the face-to-face presence and participation of other members of the community from which both victim and perpetrator come. The social identity shared by occupants of all three roles implies a shared set of normative standards that is threatened by the offense. Restorative justice focuses on interactions in which one actor has "harmed" a specific other, and threatens to undermine the normative standards of the community, and thus its collective identity.

This level of restorative practice adds two types of complexity to the issues discussed in the previous section: (1) triadic social relations contain three dyadic relations—here, those between victim and offender, victim and community, and offender and community; and (2) each of these roles might be filled by more than one person. Braithwaite (1989) suggests the importance of having both "offender" and "victim" accompanied by those with whom each has close ties, and

many restorative practices involve several (or more) representatives of the community.[5] In addition, the relevance of narrative, memory, and ritual is more clearly evident at the meso-level (triad), and at the macro-level (to be discussed in Sect. 14.4 below).

14.3.1 Narrative

Testimony about what has occurred, whether formal or informal, is likely to be produced in narrative form. Conflict is more likely to be resolved to the extent to which the narratives overlap. In everyday enactments of this ritual at the micro-level, the narrative quality of the memories recalled is likely to be abbreviated. Little if any time will have elapsed between the violation and its acknowledgement and likely resolution. Meso- and macro-level sequences are more likely both to enable and to require that memories are presented and discussed in narrative form, as "accounts." Each actor may present h/h own memory in narrative form, and with sufficient overlap so that a shared memory can be produced, a resolution agreeable to all is unlikely to occur.[6]

Restorative justice requires the construction of a shared memory of the past, in the present, in order to reconstruct spoiled identities and communities in the future. Such narratives—both micro-narratives (those constructed in a single restorative justice session) and macro-narratives (such as those constructed for transitional justice settings and practices) are important for "situating" the "back story" and for writing the future.

The types of narrative most directly relevant to restorative justice are linked to the identities and roles of the direct participants. "Victim narratives" are elicited from the central actor(s) who have been harmed and describe the sequence of events that produced that harm. "Offender narratives" are elicited from the central actor(s) who produced the harm, and describe the sequence of events that produced it. These narratives are presented to representatives of "the community" whose role is to structure a discussion that identifies both similarities and differences between the two in hopes of producing an overlapping narrative acceptable to all three.

Restorative justice theory conceives of the victim's narrative as one of suffering and contamination, and the offender's as one of harm and responsibility. The shared narrative that emerges could be called a *narrative of redemption*, in which "a demonstrably 'bad' or emotionally negative event or circumstance leads to a demonstrably 'good' or emotionally positive outcome. The initial negative state is 'redeemed' or salvaged by the good that follows it." (McAdams & McLean, 2013, p. 234; see also McAdams, Reynolds, Lewis, Patten, & Bowman, 2001)

The desired outcome is one constructed by all three actors, and one designed to benefit all three. All emerge with a more complete understanding of what happened and why the previous "victim" and "offender" offering each other redemption and reintegration into a community through a shared (re)affirmation of its values (see Wenzel & Okimoto, 2016, Chap. 13 of this handbook).

One of the difficulties is that both parties to a conflict often cast themselves in the role of victim, and the other as the offender. Such initial castings and altercastings often create "victim contests," each party focusing on the harms they have suffered and attributing that harm to the other. Such "victim contests" can occur at dyadic, the meso-, and the macro-levels. Detailed examinations of such memory-dependent narratives have demonstrated both the impediments to and the opportunities of narrative exchange.

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[5] Weisberg (2003) provides a critique of the way "community" has been conceptualized in restorative justice, and Dignan et al. (2007) offer one of the role of "restorative facilitator." Haldemann (2008) employs a similar conceptual scheme, though he does so in constructing a philosophical argument for the centrality of recognition in transitional justice, "the process by which societies confront legacies of widespread or systematic human rights abuses as they move from repression or civil war to a more just, democratic, or peaceful order." (p. 675) "Transitional justice" will be discussed directly in Sect. 14.4 below.

[6] The role of narrative has also been examined in work on "retributive justice," frequently with respect to the strategies employed by lawyers for the state and defendant, and the effects different narratives might have on jurors' decisions (see, for example, Griffin, 2013; Haney, 2009; Rose, Diamond, & Baker, 2010).

14.3.2 Memory

At the dyadic (micro-level), restorative justice involves "fleeting" dyadic interactions: offense, recognition, and repair occur in "short order." If the harm is small, people might simply ignore it: "no [significant] harm, no foul." Failure to repair the harm of the offense can, however, have longer-term consequences, reputational and otherwise. Offenders who harm and fail to repair may come to be known as untrustworthy or irresponsible as they seem to "take advantage" of others, and victims who fail to bring the harm to the offender's attention, explicitly or implicitly asking for repair, may come to be known as "easy marks" or "suckers." In these cases, none of the participants (victim, offender, and community) is "redeemed."

At the triadic (meso-level), third parties either are directly aware of the harm or informed of it by the offender or victim. A great deal of research demonstrates that third-party observers of harm often do not intervene, and might even deny knowing of it, to themselves and to others.[7] Without direct knowledge of the harm, third parties must rely on the reports of the victim, the offender, or other direct observers. These narratives depend on memorial recollections by witnesses whose testimony may be unreliable because of a limited or faulty memory, or because of a link to those directly involved.

Stone, Barnier, Sutton, and Hirst (2013) provide evidence on the selective retrieval of autobiographical memories, suggesting some of the ways people forget and thus fail to report them to others in conversation. Even when such events *are* remembered, they can be forgotten if they are not expressed, what is called "mnemonic silence." They argue that silence is public, occurs in a communicative setting, and can have different effects on speaker and listener. Such silence can affect not only individual memory, including autobiographical memory, but collective memory, "propagate[ing] through a network of indi-

viduals, thereby underscoring their role in the formation of a collective memory not just for conversing pairs but for whole communities." (Stone, Coman, Brown, Koppel, & Hirst, 2012, p. 48)

Discussions of the past are selective, as individuals do not mention all that they can in conversation. Both mnemonic and other types of silence can be conceptualized as "the refusal or failure to speak out," or, more specifically, "the refusal or failure to remember" (Stone et al., 2012 p. 40). As much as what *is* included in the narratives told and heard in restorative practices, refusals or failures to speak can affect the identities of the participants, the roles they inhabit, and the outcome of the process. Such silences can affect not only the "victim" and the "offender," but also their allies and the community members serving as facilitators. Whether such memories are expressed in the individual narratives, and in the collective narrative to which they might contribute, depends on the participants' abilities to remember and their willingness to express what they remember. One of the most important functions of the third party is to provide the kind of setting in which memories might easily be elicited and expressed, and this is another reason to distinguish the micro-level from both meso- and macro-levels (see discussion at Sect. 14.4.1 below).

14.3.3 Ritual

Rossano's (2012) recent integrative interpretation of rituals suggests they have developmental and evolutionary roots, and that they are both familial and communal universals. One universal feature of rituals is the centrality of synchronized and coordinated action that can create powerful emotional bonds among participants, which can increase empathy, affection, and cooperation among them. In addition, emotionally compelling ritual may contribute to a strong sense of group identity. Adult rituals also have representational and memorial functions. They represent "an idealized form of the human social world and its behavioral norms," and "serve as memory

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[7] Literature on bystander intervention addresses factors that facilitate or inhibit such intervention.

cues helping to bring to mind the values and behavioral standards of the group …" (p. 540).

The performance of rituals may increase conformity to social norms, and to the extent that rituals remind participants of moral standards, they may encourage reflection on failures to live up to those standards (e.g., confession, atonement, etc.) (p. 544). Ritual participants are likely to be reminded of normative standards, and this may inhibit thoughts inconsistent with relevant norms and focus attention on goals related to those norms. Furthermore, ritual can engender prosocial positive emotions toward other group members, facilitating adherence to prosocial group-based norms [p. 544].

A recent experimental field study conducted in nine different community groups in New Zealand (Fischer, Callander, Reddish, & Bulbulia, 2013) found evidence consistent with these suggestions. Distinguishing among three types of behavior matching (*exact synchrony* of movements and/or vocalizations; *complementary synchrony*, and *no synchrony*), they found that synchronous rituals and sacred rituals were linked to higher levels of cooperation. They also found evidence for a trajectory whereby synchronous actions enhance entitativity, which intensifies the importance of sacred values, and which then increase prosocial behaviors.

Rossner's (2011) examination of a videotaped restorative justice conference and the processes thought to be central to restorative practice (Braithwaite & Mungford, 1994) reveals many of these features. She employs Collins (2004) theory of interaction ritual to analyze a conference involving an offender who stole a purse and later agreed to meet with the victim in a conference facilitated by a police officer.

Though the offender's opening narrative of the event was quite disjointed, the victim's narrative that followed led to a discussion with a shared common focus, regular turn-taking, and direct communication that included the narratives of their spouses as well. Each of these involved not only reconstructed memories of the burglary, but additional elements that "situated it" in a life narrative: switching among their lives

prior to the offense, the offense itself, and their lives after it.

The narrative of the offender's wife served as a "turning point," (see p. 23 below), eliciting strong emotions from all, providing a common focus, and drawing all into "the rhythm and flow of the interaction." (p. 116) This was followed by "public displays of solidarity" (including mutual touching and eye contact) and provided the opportunity to develop a resolution endorsed by a judge. His viewing of the tape seemed to be decisive, in large measure because of what the videotape revealed to him:

I now know more about your attitude than perhaps any other defendant … There is no reason why I shouldn't tell you that I found it a very moving experience. It was not only helpful to hear what the victim said but it was also useful to see the expression on your face and I do not believe that you were acting. Every possible indication is that you were genuinely contrite (p. 116).

Restorative justice rituals can thus be seen to be aimed at a public acknowledgment of the victim's suffering and its effect on the victim's identity, as well as a public restoration of an identity either indistinguishable from non-victimized citizens, or to elevate the victim to the status of "survivor." Such settings are also intended to acknowledge publicly the offender's status as someone who has caused harm—material harm, degradation of the victim, and disrespect for central community values—and either to restore the offender to a previous status indistinguishable from non-offenders or to elevate the offender to an even higher identity than before the offense, as someone who has been redeemed.

Additional research supports the description of restorative justice practice as ritual, as well as providing a clear view of the conversational processes involved. Gray (2005) interviewed offenders in a study of a British governmental restorative justice program, most of whom expressed confidence about staying out of trouble, and in the belief that their apologies were an important part of practice. Those who had to perform community service in addition were more likely than others to see it as

punishment to deter them from re-offending rather than a demonstration of their desire to be reintegrated into the community. Though both offenders and victims expressed satisfaction with the process, it was not clear to them whether the outcomes were "restorative." This suggests the importance of distinguishing a reintegration that is *local and immediate* from one that is *broader and longer-lasting*.

14.4 Macro-Level

Restorative practices at this level usually extend over much longer periods of time, may also occur simultaneously or sequentially in different locations, and envelop large sectors of a single state (or society) or more than a single state. The practices emerge in the aftermath of macro-level conflicts to address the individual and collective harms they have produced, and in the context of a state level transition. They are referred to as attempts to address "historical injustice(s)" or "transitional justice practices."[8] Perhaps the most widely discussed example is the South African Truth and Reconciliation Commission (http://www.justice.gov.za/trc/).

As suggested earlier (Sect. 14.3), these practices involve three dyadic relations (between victim and offender, victim and community, and offender and community), as well as a triadic social relation among offender, victim, and community. In addition, each role is likely to be filled by more than one person. Restorative practices at the micro- and meso-level often occur in a limited space and for a limited time. Whether "successful" or not at addressing dyadic or triadic conflict, such practices tend to be circumscribed spatially and temporally.

The identity of each of the collective actors in transitional justice practice will be linked to an historical narrative, but it is also likely to reflect

internal divisions among individuals or between subgroups, each with a different identity and narrative. Different narratives will likely be reflected in differences in the way memory and ritual affect the practice of transitional justice, and the importance of these differences is likely to depend on the degree to which the relevant social relations among actors are exchange- or communally based.

14.4.1 Narrative

The triadic structure of restorative justice is easily recognizable in transitional justice practices: victims provide narratives of the harm they have suffered; offenders provide narratives of their role in producing that harm; and both are presented to representatives of "the community" whose role it is to structure a discussion in hopes of producing an overlapping narrative acceptable to all three, and an agreement about how the harm should be addressed. The settings in which such narratives are told may vary. In some cases, only two parties may be present—as when victims *or* offenders tell their stories to community representatives; in other cases, all three might be present. In addition, a "victim" might appear alone, along with non-victim supporters, or with other victims; the same is true of offenders.

As was the case in meso-level restorative practices, victims' narratives in transitional justice describe suffering and contamination, and offenders' narratives focus on harm, responsibility, remorse, and apology. Attentive listeners tend to evoke more detailed and elaborated narratives, and in initial stages of discussion they may be more likely to come from a victim's (or offender's) family and friends (McAdams & McLean, 2013). As the discussion continues, however, listening attentively to the "other" narrative may become more likely, which may then elicit even more detailed and elaborated responses. The result is the emergence of a shared narrative of redemption constructed by and to the benefit of all three. All emerge with a more complete understanding of

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[8] Differences among such truth and reconciliation commissions (TRCs) and between these and other macro-level forms to address many related practices will not be addressed here. I will employ the term "transitional justice."

what happened and why the previous "victim" and "offender" offering each other redemption and reintegration into a community by a shared (re) affirmation of its values. This shared narrative helps to construct a shared memory of both the conflict and its resolution. Work discussed earlier (Cameron, 2007; Cameron & Seu, 2012; Rossner, 2011) is similar in many ways to the focus on (primarily) victim narratives elicited in transitional justice practice.

Work on narrative has emerged in conjunction with increased attention to restorative practice. Hammack and Pilecki (2012) have suggested narrative be considered the "root metaphor" for political psychology, and theoretical and empirical work on narrative seems to have grown significantly alongside increased attention to processes central to conflict and justice.

Hammack (2013) explored links between Israel's master narrative and the individual narratives of Israel youth by interviewing 17 Jewish Israeli youth motivated to engage with Palestinians in a coexistence program. He found significant overlap between their individual narratives and Israel's master narrative of collective redemption involving four related themes (historical persecution and victimization, existential insecurity, exceptionalism, and delegitimization of Palestinian identity). Most problematic for the possibility of reconciliation, the idea of Israeli exceptionalism is closely linked to the delegitimization of Palestinian identity. What might initially appear to be an acceptance of Palestinian identity often became conditional because of a failure to acknowledge the conflict's clear asymmetry of power.

Additional research on Israeli and Palestinian narratives (Ben Hagai, Hammack, Pilecki, & Aresta, 2013) examined a contact encounter among Israeli, Palestinian, and American adolescents, not only to identify root narratives articulated by Israelis and Palestinians in discussing the conflict, but also to discover whether certain conversational conditions might lead to acknowledgement of the legitimacy of the out-group's narrative. Previous work on structured encounters suggested that the asymmetric power relationship between the two parties and a focus

on the history of the conflict (rather than on the present situation) present major obstacles. Here, as in meso-level restorative practices, the active participation of a third party seemed to be crucial in producing a successful resolution by helping to identify the central features of each party's narrative and the nonverbal messages they might contain.

This study also found the two groups employing different narratives. Israelis employed a narrative in which they have positive, peaceful intentions, but live among Arabs from whom they must consistently defend themselves against attack. Palestinians employed a narrative in which they have been dispossessed from their native homeland by a Jewish occupation under which they experience suffering and humiliation (p. 305). When an American third party was actively involved in conversations that focused on the present, the number of personal narratives and also acknowledgment of the out-group increased. The authors suggest that the introduction of new information based on personal experiences into the conversation "had a special claim to truthfulness and that refuting it would suggest that those who [provided it] were liars" (p. 306).

A recent field experiment in Rwanda (Bilali & Vollhardt, 2013) examined the effect of the embedding of messages about justice and dialogue in a radio drama that featured a reconciliation process between the two villages. Six months after the beginning of the program, participants received an "audio-delivered questionnaire," in which the questions were asked either by an actor from the program or an unknown actor. Those who heard the actor from the show demonstrated less competitive victimhood and intergroup mistrust, but greater perceived similarity between the in- and out-group's suffering (p. 148).[9]

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[9] As suggested above, both parties to a conflict are likely to cast themselves as victim, and the other as offender. These castings can often reframe the conflict so that each party emphasizes the harms it has suffered, and attributes that harm to the other (e.g., Shnabel and Ullrich, (2013); Shnabel, Halabi, & Noor, 2013).

14.4.2 Memory

Molly Andrews (2003) suggests that both individual and collective memory[10] are contested terrains. Truth commissions, and other macro-level restorative practices, allow sites where large publics can witness "the making of collective memory, with all of the tensions and ambiguities that this entails." (p. 62) Such sites may not only be open to public access, nor accessible only for real-time listening and viewing. In preparation for such practices, or in their wake, archives of testimony by victims, offenders, and observers have been created to establish a memorial record. Among them are those established in relation to the South African Truth and Reconciliation Commission, The Register of Reconciliation "gave members of the public a chance to express their regret at failing to prevent human rights violations and to demonstrate their commitment to reconciliation."   (http://www.justice.gov.za/Trc/ror/index.htm). The Apartheid Archives Project aims to examine the nature of the experiences of racism of particularly "ordinary" South Africans under the old apartheid order and their continuing effects on individual and group functioning in contemporary South Africa … [It] documents, analyzes and provides access to personal or narrative accounts of the impact of apartheid on the lived realities of their authors (www.historicalpapers.wits.ac.za/?inventory/U/collections&c=AG3275/R/9023)

Bradbury (2012) examined narratives of the past drawn from the Archives as well as from the accounts of artists and analysis of social scientists at the third Apartheid Archive Conference in Johannesburg in July 2011. She notes the frequent mention of the phrase "being moved:" What moves in our encounters with great art or with the stories of others' lives is we ourselves. It is this "movement" or "being moved" that prevents us from simply settling back into our chairs and returning to our former selves … The ques-

tion that artists, especially writers, must ask is, "How can we create texts that will move the audience, taking them to new places of understanding and new ways of living?" (p. 348)

This is reminiscent of the metaphor of the "journey" Cameron and Seu identified in the conversations between Jo Berry and Pat Magee that helped lead to their reconciliation (Cameron, 2007; Cameron & Seu, 2012), as well as Green and Brock's (2000) examination of the role of "transportation" in public narratives, including the experience of "being transported."

Bradbury also suggests that the Apartheid Archive not only enables people to tell their own stories, but provides others—both those who lived through the experience or a similar one and those in future generations—the opportunity to read them (2012, p. 349) They became part of the historical record that may affect both individual memories and a society's collective memory. Such information is available to those who participated directly in the harm—as victims, offenders, or community members—and those who did not. These "official" archives are often supplemented through intergenerational contact—between those who experienced the harm, primarily (though not only) as victims, and a "born-free" or "hinge generation," those born after the harm was initially committed. Some of these may be direct descendants of victims (or offenders), while others may not. The information available can thus consist of both archival material and direct contact with participants.

Frankish and Bradbury (2012) explored one kind of such contact, the stories that South African mothers and grandmothers told their (grand) children about their experiences during Apartheid. The older women often told traumatic stories involving violence toward and the death of family members and friends. The narratives they tell distinguish between their lives before and after the "turning point" at which the violence occurred (see p. 15 above). The major themes that emerge involve sexuality and mothering, and these are linked to both trauma and nostalgia, and the narratives include not only talk but significant silences, here as earlier communicated through refusals and failures to speak.

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10 Work on collective memory is large and multifaceted. Only a small sample of that work is referred here (Brants & Klep, 2013; Hewer & Roberts, 2012; Hirst & Echterhoff, 2012).

However, Frankish and Bradbury (2012) also note that though the traumatic events were experienced as "pivotal and disruptive" when told to the interviewers, when told to their children and grandchildren they become nostalgic versions of their own pre-trauma lives. In this way, they fashion nostalgic versions of a longer past as a way to overcome the violation of the trauma event for the next generation. Recapturing a time before the trauma event, even a difficult and hard time, offers these women a sense of mastering the trauma even, and provides resources for the next generation to navigate their own stories (pp. 304–305).

Mohamed and Ratele (2012) also analyzed a sample of narratives from the Archive and concluded that, without intending to do so, the project has become less about the past, and more about "subjects trying to live with the memory of apartheid in the present while trying to imagine a future where the wounds of racism are sutured." (p. 291) They also suggest the importance of a distinction between conciliation—fostered by a new constitution allowing conciliation at both the familial and national levels—and the *re*conciliation that might follow, again at both the familial and national levels, but only when memory overcomes "the pervasive silences in the narratives and nostalgia's temporal conflations and demonstrates the pains of returning home with its multiple and contradictory meanings." (p. 291)

Similar themes emerge in recent work examining links between shared memories produced in family conversation and collective memories of national history. For example, Sonn (2012) draws on narratives submitted to the Apartheid Archive Project by South African immigrants in Australia about their memories, and Bietti (2010; Bietti & Audelo, 2012) also explore autobiographical and collectives memories of the Argentinian dictatorship that emerge in family discussion and storytelling.

14.4.3 Ritual

Transitional justice practice, as well as similar practices at other levels, suggests the importance of distinguishing between ritualistic action and ritual. Among many others, restorative justice theorists claim that the ritual character of a practice has significant consequences. Rossano argues (2012; see earlier discussion) that synchronized and coordinated action is central to ritual, and that the shared movements involved can create powerful emotional bonds among participants.

Transitional justice practices are often extended in time (occurring over many years) and space (simultaneously in several places or sequentially in different places). While restorative practices at the micro- and meso-levels often involve a single offender and victim (and their supporters), transitional justice practice involves many individual victims and individual perpetrators, and in some cases, collective victims and offenders. Though the ritual underlying the practice is similar—victims' testimony about the harm suffered, offenders' testimony about their role in producing it, and community representatives' organization and facilitation of the process, variations in the number and constitution of the categories of victims and offenders will vary. Because of the complexity of such processes, relevant theory and research vary a great deal in scope, focus, and methodology (Clamp & Doak, 2012; Lambourne, 2009).

Maruna (2011) examines restorative rituals by focusing on the reintegration of offenders into the community. He suggests understanding this as the last of three stages—preceded by separation from everyday life and liminality akin to van Gennep's classical work on "rites of passage." (1909/1960) In the liminal stage, the person lies between a previous stage of certainty and clear identity, and a later stage in which certainty and identity have been transformed.

In reintegration, the person is welcomed into a new status through "symbolic acts of incorporation" which contribute to the definition and ratification of a new self, a central feature of Braithwaite's initial conception of reintegration. Achieving such a reintegration was seen to require the experience of reintegrative shame, rather than a stigmatizing shame that was likely to lead to re-offending.

Central to Maruna's argument is that rituals affect not only direct participants, but a wider audience, which might be the primary intended focus and beneficiary. Beyond their effects on participants and the audiences exposed to them, rituals are intended to reaffirm and thus reinforce the shared moral foundation of the relevant community. It is for this reason that he stresses the importance of community members' involvement in the rituals themselves, a central aspect of Rossano's (2012) conception of ritual. It is much easier to identify these theoretically based hypotheses on the effects of transitional justice ritual than it is to employ them in practice and to systematically investigate their consequences.[11]

Systematic research on the effects of these ritual practices at the macro-level has increased significantly and has produced important, if conflicting, results. For example, Rimé (Rimé, Kayangara, Yzerbyt, & Paez, 2011) reports that the rituals involved in the Gacaca tribunals following the 1994 Rwandan genocide effectively increased shame among offenders and reduced it among victims. In addition, participation reduced perceived out-group homogeneity, decreased in-group self-categorization, and increased positive stereotypes among both victim and prisoner participants. Similar effects were observed by Rimé in research on Chileans' response to the Truth and Reconciliation Commission, and Political Imprisonment and Torture Commission (see also Allpress, Barlow, Brown, & Louis, 2010).

However, Schimmel (2012) argues that the retributive features of these tribunals may well come at the expense of restorative justice for victims. With respect to the descendants of offenders, after reviewing research on self-criticism among citizens of European countries involved in colonization and twentieth-century genocides, Leach and his colleagues (2013) conclude there is little evidence of strong and explicit self-criticism for injustices committed in the recent past, and only slightly more for those committed in the distant past.

Two other pieces of work might be mentioned in addressing the issue of memory in "transitional justice." First, Morgan (2012) discusses the issues surrounding Germany's apology to the Hereros in Namibia 100 years after the beginning of a colonial war (1904–1907) in which German citizens gradually occupied traditional lands, and then engaged in systematic violence that shattered Herero society. Later growth and unification of that society linked to war with Germany, and in Namibia more generally, led to independence in 1990 and the declaration of a national policy of reconciliation.

Partly because of fear that independence would distract public attention from the injustices they suffered, Hereros began public and coordinated efforts to involve Germany in reconciliation. They called on Germany to recognize the events of 1904–1907 as genocide, to admit its responsibility for it, and to address the historical injustices. Programs of public commemoration were conducted in 2004 to recognize the centenary of the start of the fighting at which Germany's Minister for Economic Development and Cooperation offered an official apology:

We Germans accept our historical and moral responsibility and the guilt incurred by Germans at that time. And so, in the words of the Lord's Prayer that we share, I ask you to forgive us our trespasses and our guilt. Without a conscious process of remembering, without sorrow, without apology, there can be no reconciliation—remembrance is the key to reconciliation … Those who fail to remember the past become blind to the present. By remembering the past, we should gain strength for the present and the future (Morgan, p. 31).

Kurtis, Adams, and Yellow Bird (2012) examined the relationships among collective identity, individual identity, and collective memory of past wrongdoing. They conducted content analyses of Thanksgiving proclamations ("national glorifications") by US presidents for the period 1993–2000 (Bill Clinton) and 2001–2009 (George W. Bush) to examine the major themes included, and those that went unmentioned. They compared

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[11] Celermajer (2013) offers a thoughtful critique of attempts to distinguish "mere rituals of apology" from "sincere" ones, particularly for apologies in transitional justice. See also Fischer et al. (2013) for an evolutionary account of collective rituals, and Summers-Effler (2010) for an application of ritual theory to social movements.

these themes with remarks prepared by Frank Wamsutta James, Wampanoag leader, for a 1970 event commemorating the 350th anniversary of the Pilgrims' landing in Plymouth. James's remarks included the following:

Today is a time of celebrating for you, but it is not a time of celebrating for me. It is with heavy heart that I look back upon what happened to my People. The Pilgrims had hardly explored the shores of Cape Cod four days before they had robbed the graves of my ancestors, and stolen their corn, wheat, and beans. Massasoit, the great leader of the Wampanoag, knew these facts: yet he and his People welcomed and befriended the settlers little knowing that before 50 years were to pass, the Wampanoags and other Indians living near the settlers would be killed by their guns or dead from diseases that we caught from them.

Though the major theme in the presidential proclamations was "national glorification," genocidal themes were addressed in three different ways. Indigenous Peoples were either simply not mentioned, they were mentioned but genocidal violence went unmentioned, or both the Indigenous Peoples and the genocidal conquest were mentioned, but the conquest was interpreted as a function of national glorification.

14.5   Conclusion

I've tried to demonstrate here the underlying structural similarities of restorative justice practices at three levels of analysis: micro (dyadic), meso (triads), and macro (enveloping large sectors of a single state, or society, or more than a single state). Distinctions among the levels are meant to be useful for comparing different types of complexity in social organization, but they are likely no more useful (hopefully not less) than other such distinctions, and useful only to the extent they illuminate substantive issues and stimulate future theoretical and empirical work. The same is true for the distinctions drawn among narrative, memory, and ritual. It's difficult to imagine a restorative justice process without stories that rely on memory, and a structure within which they can be told.

I've also stressed the fundamental importance of the triadic nature of these practices. I've relied here on a great deal of experimental research that focuses on the reactions of individuals asked to imagine themselves in dyadic or triadic interaction, and at times face-to-face varieties of each. Arguing that restorative justice practices are fundamentally triadic interactions is meant to suggest the importance of a broad range of research strategies. A good deal of the work discussed here relies on detailed observation of restorative practices that occur over long periods of time, and *as* they occur. Work that addresses the mutual interdependencies of narrative, ritual, and memory in restorative practices is very much needed.

Finally, though restorative justice might have received less explicit attention than work on distributive justice and procedural justice, I've suggested that a restorative practice might provide a deeper and more systematic examination of the settings in which claims about injustice are contested. It might also encourage more work that integrates theory and research both *within* disciplines and between them.

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The Psychology of Social Justice in Political Thought and Action

15

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[T]he prevailing belief in 'social justice' is at present probably the gravest threat to most other values of a free civilization.

— Friedrich August von Hayek

If you tremble with indignation at every injustice then you are a comrade of mine.

— Ernesto Guevara

Social justice is at the heart of political action. This becomes evident when one considers contemporary political movements, such as the Arab Spring or Occupy Wall Street movements, both of which contested existing forms of social, economic, and political inequality. The central concerns of the Occupy movement referenced notions of injustice, including the principle that a society's wealth should not be highly concentrated at the very top of the population (e.g., the wealthiest 1 %). Similarly, the unofficial slogan of the Arab uprisings was "Freedom, Dignity, and Social Justice!"

Political philosophy has addressed the relevance of social justice in political theory since the times of classical antiquity. Plato and Aristotle introduced the idea of the person as a "zoon politicon," a social animal that strives to organize communal life (politie, greek: πολιτεία). For centuries,

scholars have offered ideas about why social justice is such an important cornerstone of human societies and how it can best be accomplished through political conduct. Historical milestones include social contract theory (e.g., Hobbes, Locke, Rousseau, Rawls), utilitarianism (e.g., Bentham, Mill, Hume), Marxian socialism (e.g., Marx, Engels, Gramsci, Lukacs), feminism (e.g., de Beauvoir, Friedan, MacKinnon), and various other forms of critical theory (e.g., Adorno, Benjamin, Foucault, Habermas).

In the present chapter, our goal is not to review the normative (i.e., philosophical) conceptions of social justice (for a review, see Meyer & Sanklecha, 2016, Chap. 2 of this handbook; see also Jost & Kay, 2010). Instead, we address the psychology of social justice in the context of politics, focusing in particular on ordinary citizens' thoughts, feelings, and actions. Acknowledging that it is difficult to find a commonly accepted definition of social justice, Jost and Kay (2010) pointed out that social justice is a property of social and political systems and reflects at least two different states of affairs. First, benefits and burdens in society are distributed in accordance with principles of justice. Second, social justice depends upon procedures, norms, and rules that govern political decisions to preserve the basic rights, liberties, and entitlements of individuals and groups.

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The first criterion pertains to *distributive justice* (see Jasso, Törnblom, & Sabbagh, 2016, Chap. 11 of this handbook). A central research question in this domain is how people perceive and evaluate the distribution of wealth (and other outcomes) in a given society. From a psychological perspective it is important to note that people differ in (a) how important distributive justice is to them, and (b) what types of distributive outcomes they consider to be just. In the present chapter, we will discuss ways in which conceptions of justice—especially conceptions of distributive justice—vary as a function of political attitudes and ideological beliefs. In particular, we will review empirical evidence indicating that people who consider themselves to be leftists (or liberals) differ systematically in their justice conceptions when compared with people who consider themselves to be rightists (or conservatives). The second criterion refers to the domain of *procedural justice* (see Vermunt & Steensma, 2016, Chap. 12 of this handbook) and is strongly related to the notion of political legitimacy. A central research question in this area is whether and, if so, how people evaluate rules, procedures, and systems as fair and just. Accordingly, we outline research on how laypersons derive political legitimacy from procedural fairness within the political system and how procedural fairness promotes cooperation within a societal system. Whereas perceptions of distributive and procedural justice contribute to the appraisal of social justice in a given society, perceptions of *social injustice* motivate political protest behavior. Thus, we will also address the question of how perceived injustice can mobilize political protests and why people sometimes fail to oppose social injustice. Finally, we will address research gaps and potential avenues for future research.

15.1 Political Attitudes and Conceptions of Justice

There is a fairly broad consensus in political science and psychology that beliefs about social justice reflect key elements of political attitudes and ideology (see also Jost, Federico, & Napier, 2009). This becomes obvious when one examines the most commonly used indicator of political ideology: the left-right dimension. The classification of political attitudes in terms of a single left-right (or liberal–conservative) dimension can be traced back to the French Revolution, when conservative supporters of the monarchy sat on the right side of the French Assembly hall, while revolutionary opponents sat on the left. Since that time, scholars have frequently argued that equality is an extremely important organizing principle in left-wing political attitudes, whereas resistance to egalitarian forms of social change reflects an important element of right-wing attitudes (Jost et al., 2009; Jost, Glaser, Kruglanski, & Sulloway, 2003; McCloskey & Zaller, 1984). Research on the psychological underpinnings of justice conceptions in leftists and rightists adds complexity and nuance to this picture. In what follows, we review empirical research on the relationship between political ideology and various conceptions of justice. We use the terms left or liberal and right or conservative interchangeably and focus on two questions. First, do liberals generally care more about justice as a moral (or ethical) matter than conservatives? Second, do liberals emphasize different principles of distributive justice than conservatives?

15.1.1 Social Justice as a Moral Concern

Social justice concerns are typically regarded to be moral concerns (e.g., Giner-Sorolla, 2012). For example, if someone is treated unfairly in a given society, people generally regard this to be morally wrong. Although there is no common definition of morality, scholars assume that moral concerns "must bear on the interest or welfare either of society as a whole or at least of persons other than the judge or agent" (Gewirth, 1984, p. 978). From an evolutionary perspective, Haidt and Kesebir (2010) have discussed five sources of intuition about morality, namely, concerns for

(a) fairness and justice, (b) care and the avoidance of harm, (c) loyalty within social groups, (d) respect for and obedience to authorities, and (e) spiritual and bodily purity.

Studies have revealed correlations between left-right (or liberal-conservative)orientation and the endorsement of these different moral intuitions (Graham, Haidt, & Nosek, 2009; Haidt & Graham, 2007; McAdams et al., 2008; Van Leeuwen & Park, 2009). Whereas liberals value justice and care more than conservatives do, conservatives value loyalty, respect, and purity more than liberals do. Haidt and Graham (2007, p. 99) interpreted these results as follows: "justice and related virtues (based on the fairness foundation) make up half of the moral world for liberals, while justice-related concerns make up only one fifth of the moral world for conservatives."[1]

Differences in moral concerns between liberals and conservatives are presumably related to the "cultural divide" in the U.S. concerning controversial political issues such as abortion, gun control, gay marriage, economic inequality, and climate change. Many conflicting stances can be linked to the fact that liberals and conservatives emphasize different moral concerns (Koleva, Graham, Iyer, Ditto, & Haidt, 2012). For example, a heightened sensitivity to issues of social justice could explain liberals' support for same-sex marriage, whereas disgust reactions in response to violations of purity could help to account for conservatives' opposition to same-sex marriage.

There is some cross-national evidence suggesting that the correlational patterns between political orientation and moral concerns observed in the U.S. are also present in other cultural contexts (Graham et al., 2011). At the same time,

some critics feel that the identification of these five (or, sometimes, six) moral "foundations" is at least somewhat arbitrary and assumes that very different types of intuitions (e.g., justice-based vs. disgust-based responses) should be placed on an equal moral plane. Indeed, as Jost (2012) pointed out, some of the world's greatest atrocities have been motivated by ideological commitments to in-group favoritism, obedience to authority, and the enforcement of purity standards.

15.1.2 Different Principles of Distributive Justice

Liberals and conservatives differ not only in how strongly they emphasize justice concerns in their moral judgments. There is also a difference in how issues of distributive justice are conceptualized and appraised. As we have already noted, the domain of distributive justice pertains to decisions about how to distribute benefits and burdens to individuals and groups through means such as taxation, entitlement programs, and the provision of public goods (Mitchell, Tetlock, Newman, & Lerner, 2003; see also Sachweh, 2016, Chap. 16 of this handbook). The fairness of distributions can be judged according to three different principles: equality, equity (or proportionality, including merit), and need (Deutsch, 1975; see also Jasso, Törnblom, & Sabbagh, 2016, Chap. 11 of this handbook). According to the principle of equality, resources should be shared equally among the members of a group or society; according to the principle of equity/ merit, resources should be distributed in accordance with individual contributions; according to the principle of need, resources should be directed toward those who need them the most. This formulation leads us to the question of whether liberals and conservatives emphasize different principles of justice (see also Jost & Kay, 2010).

Empirical evidence indicates that liberals judge public policies as more fair when they are based on the principle of equality than if they are based on merit, whereas conservatives tend to

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[1] Haidt and Graham (2007) argue, with apparent approval, that conservative morality is more "balanced" than liberal morality. However, Jost (2012) pointed out that that the scales used to measure moral intuitions suffer from the problem of acquiescence response bias and that conservative patterns of responding suggest general agreement with all items and a lack of differentiation among potentially competing moral principles rather than "balance" per se.

prefer merit-based policies over egalitarian policies (Rasinski, 1987). Thus, liberals are generally more concerned about economic inequality than conservatives (e.g., Mitchell, Tetlock, Mellers, & Ordonez, 1993; Napier & Jost, 2008). Differences in fairness judgments between liberals and are conservatives seem to be greatest in hypothetical societies that contain moderate (rather than especially high or low) degrees of meritocracy (Mitchell et al., 2003). When it is ambiguous or unclear whether economic outcomes in society are earned or unearned, liberals appear to focus on the insufficiency of meritocratic considerations and, thus, interpret economic inequality as unfair. By contrast, conservatives seem to emphasize its sufficiency and, thus, interpret economic inequality as fair.

Political ideology is also related to the evaluation of the need principle when it comes to the distribution of public goods. There is consistent evidence that conservatives are more likely to attribute the personal neediness of claimants to internal and controllable factors, such as a lack of effort or an unwillingness to be self-reliant, whereas liberals are more likely attribute neediness to factors external to the person, such as discrimination or a lack of equal opportunity (e.g., Christiansen & Lavine, 1997; Napier, Mandisodza, Andersen, & Jost, 2006; Skitka & Tetlock, 1992). Likewise, liberals are more inclined than conservatives to make external attributions for poverty (Furnham, 1982a; Sniderman, Hagen, Tetlock, & Brady, 1986; Weiner, Osborne, & Rudolph, 2011), unemployment (Feather, 1985; Furnham, 1982b), and criminal behavior (Carroll, Perkowitz, Lurigio, & Weaver, 1987; Miller, 1973). Thus, conservatives are more likely than liberals to (a) evaluate claims for public support as undeserved, (b) suspect free riding, and (c) oppose bids for public support (e.g., Skitka & Tetlock, 1993). Furthermore, conservatives are more likely than liberals to believe that claimants from social out-groups (such as immigrants) are less deserving than claimants from in-groups (Bierbrauer & Klinger, 2002; Van Oorschot, 2006).

15.1.3 Political Ideology as Motivated Social Cognition

As we have already suggested, conceptions of justice are related to political thought and action in at least three different ways. First, social justice plays a more central role in the moral judgments of liberals and leftists than it does in the judgments of conservatives and rightists (as the epigrams we have chosen for this chapter would suggest). Second, when it comes to considerations of distributive and redistributive justice, liberals are more inclined to evaluate fairness in terms of the principle of equality, whereas conservatives are more likely to emphasize the principle of merit. Third, conservatives are more likely to attribute the causes of personal need to internal factors and are less inclined than liberals to support policies of redress (including welfare and affirmative action). In this section, we introduce theories of system justification (e.g., Jost & Banaji, 1994; Jost & van der Toorn, 2012) and social dominance (e.g., Sidanius & Pratto, 1999) to address motivational explanations for why political attitudes would be related to justice conceptions.

System justification theory (SJT) posits that people are motivated to evaluate the societal system in which they live and work in relatively positive terms (Jost & Banaji, 1994). Jost and Hunyady (2005) proposed that system-justifying tendencies result from epistemic motives to reduce uncertainty and existential motives to manage threat and that both types of motives lead people to favor conservative attitudes that maintain the status quo. There is indeed consistent evidence that (in comparison with liberals) conservatives (a) exhibit higher needs for order, structure, and closure; (b) are more concerned about threats to the stability of the social system; and (c) score higher on various measures of system justification (Jost et al., 2003; Jost, Nosek, & Gosling, 2008).

McCoy and Major (2007) linked conservatives' preference for the merit principle over the equality principle to system justification motivation. The basic idea is that because conservatives are more inclined to believe that the existing

social order is just they are more motivated to legitimize existing inequalities in general (but see Son Hing et al., 2011). In any case, there is a good deal of evidence that the justice conceptions of conservatives are shaped by system justification, social dominance, and other motivational dynamics (e.g., see Knowles, Lowery, Hogan, & Chow, 2009). For instance, Napier and Jost (2008) demonstrated that economic inequality in society affects subjective well-being more negatively for liberals than conservatives. More specifically, they discovered that increased inequality in the U.S. (measured with macroeconomic indices) from 1974 to 2004 was associated with a stronger reduction in self-reported happiness for liberals than conservatives. The authors suggested that conservative perceptions that inequality is legitimate and deserved provide an ideological buffer against the negative hedonic effects of inequality.

Another psychological pathway by which political orientation may be linked to conceptions of justice can be derived from social dominance theory (Sidanius & Pratto, 1999). Social dominance theory focuses on the maintenance and stability of group-based social hierarchies (such as status differences based on sex or ethnicity) and proposes that individuals differ in social dominance orientation (the tendency to justify and legitimize group-based hierarchies). Duckitt and Sibley (2010) argue that social dominance orientation is important for understanding why people embrace conservative ideology. They state that a personality orientation characterized by tough-mindedness and a lack of empathy predisposes people to perceive the social world as a competitive jungle. This perception reinforces the motivational goals of power, dominance, and superiority and translates into attitudes and behaviors that prioritize group-based dominance and opposition to equality in intergroup relations. In other words, people with a stronger social dominance orientation are more likely to believe that everyone is the architect of his or her own fortune. Such individuals are also more inclined to prefer merit over equality as a principle of distributive justice (Haley & Sidanius, 2006; Pratto,

Sidanius, Stallworth, & Malle, 1994; Pratto, Tatar, & Conway-Lanz, 1999).

In conclusion, political attitudes and justice conceptions are strongly interrelated, insofar as conservatives (a) are less likely to prioritize issues of fairness and social justice when making moral judgments, (b) more likely to evaluate distributive justice in terms of principles of merit than equality, and (c) more readily interpret requests for public support on behalf of disadvantaged groups as undeserved, in comparison with liberals. For all of these reasons, conservatives are less inclined than liberals to support bids for redistribution or redress (including welfare and affirmative action). There is also quite a bit of evidence to suggest that ideological differences in resistance to social change and opposition to equality are derived at least in part from motivational dynamics that can be explained according to theories of system justification (Jost et al., 2003, 2008, 2009) and social dominance (Sidanius & Pratto, 1999).

15.2 Procedural Justice in the Political Arena

Procedural justice plays an especially important role in the evaluation of democratic societies. For example, governmental elections are typically experienced as fair to the extent that they satisfy clear criteria for procedural fairness: "The will of the people shall be the basis of the authority of government; this will shall be expressed in periodic and genuine elections which shall be by universal and equal suffrage and shall be held by secret vote or by equivalent free voting procedures" (§ 21.3 of the Universal Declaration of Human Rights, United Nations, 2014). From a social psychological perspective, we may ask how people evaluate the fairness of political decision-making, and how perceptions of procedural fairness in the political arena relate to citizens' support for political institutions, authorities, and outcomes. Next we outline the psychological links among procedural justice, institutional trust, and political legitimacy, and we will address the question of how evaluations

of procedural justice in political decision-making relate to forms of civic cooperation.

15.2.1 The Emergence of Political Legitimacy

Legitimacy has evolved as a key concept for understanding leadership, authority, and regime support in the social and behavioral sciences (Hegtvedt, Johnson, & Watson, 2016, Chap. 23 of this handbook; Jost & Major, 2001). At the most general level, legitimacy refers to the "property of an authority, institution, or social arrangement that leads those connected to it to believe that it is appropriate, proper, and just" (Tyler, 2006a, p. 375). Political legitimacy reflects the idea of *power through entitlement*. Political power can result from different sources, such as threat or social cohesion or promises of reward or punishment. For example, in a dictatorship, power is typically based on threat and the fear of punishment (Moghaddam, 2013). Legitimacy, however, provides political power based on the perception that authorities are entitled to lead. To the extent that an authority figure is chosen through legitimate means (such as a free and fair election), the decisions or rules that are enforced by that authority figure will be more voluntarily accepted (Tyler, 2006b; Tyler & Jackson, 2013).

There is an abundance of evidence that political authorities and institutions are viewed as more legitimate when they exercise their authority through procedures that people experience as fair (e.g., see Tyler, 1984, 2006a). Leventhal (1980) proposed that consistency (i.e., when the process is applied consistently across persons and time), bias suppression (i.e., decision makers are neutral), accuracy of information (i.e., decisions are not based on false information), correctability (i.e., procedures exist for correcting bad outcomes), representation or voice (i.e., all subgroups in the population affected by the decision are heard from), and ethics (i.e., the process upholds personal standards of ethics and morality) are hallmarks of procedural justice. In numerous studies, a positive correlation between perceptions of procedural fairness and ascrip-

tions of political legitimacy has been observed with regard to legislative institutions such as the U.S. Congress (e.g., Farnsworth, 2003), legal institutions such as the Supreme Court (e.g., Gibson, Caldiera, & Spence, 2003), and authorities such as the police (e.g., Tyler, 2011). In other words, the more political authorities are seen as satisfying the criteria for procedural justice, the more they are perceived as trustworthy, legitimate, and entitled to lead. There are good theoretical and empirical reasons to assume that perceptions of procedural justice and political legitimacy are mutually reinforcing. Whereas fairness heuristic theory suggests that there is a causal effect of procedural justice on perceptions of political legitimacy (Lind, 2001), SJT would also suggest that perceptions of political legitimacy (as well as other antecedents of system justification) could foster perceptions of procedural justice (van der Toorn, Tyler, & Jost, 2011). Here we outline both theoretical approaches and provide an overview of the empirical evidence bearing on each.

A central assumption of fairness heuristic theory is that people in organizations and societies are confronted with a fundamental social dilemma when it comes to trusting and supporting political authorities (Lind, 2001). Whereas people generally benefit from organizational structures by means of collective goods (e.g., using taxes to build roads), there is also a risk of exploitation from powerful leaders. According to the theory, people use procedural justice criteria as heuristic cues by which to evaluate the trustworthiness of authorities. When authorities act in line with these criteria, it communicates their willingness to sacrifice some of their own prerogatives (e.g., things they could obtain by exploiting their power) for the benefit of their followers (e.g., Colquitt & Rodell, 2011; Van Dijke, De Cremer, & Mayer, 2010). Authorities who disregard these criteria, on the other hand, tend to be perceived as untrustworthy (e.g., Tyler & Wakslak, 2004). Although most research addressing the causal effects of procedural fairness on perceived legitimacy and trustworthiness has been conducted in organizational contexts, there are some studies documenting this link in politi-

cal settings (e.g., Clawson, Kegler, & Waltenburg, 2001; Gangl, 2003; Kershaw & Alexander, 2003; Murphy, 2004; Terwel, Harinck, Ellemers, & Daamen, 2010; Tyler & Caine, 1981; Tyler, Rasinski, & McGraw, 1985).

Reversing the direction of causality, SJT suggests that the processing of information about procedural justice could itself be influenced by the motivation to perceive the system as legitimate and just (e.g., see Jost & van der Toorn, 2012). System-defensive motivation is theorized to be especially strong for individuals who possess heightened epistemic, existential, or relational motives, such as those exposed to circumstances of threat. For instance, Feygina and Tyler (2009) observed that participants who were high (vs. low) in system justification were less likely to integrate information about procedural injustice by legal authorities into their appraisals of trustworthiness. Other evidence similarly suggests that political legitimacy promotes the motivational distortion of procedural justice perceptions (Colquitt & Rodell, 2011; Vainio, 2011; van der Toorn et al., 2011). That is, the more people perceive an authority to be legitimate, the more system justification "kicks in", diluting the effects of perceptions of procedural injustice.

15.2.2 Procedural Justice and Civic Cooperation

Cooperation is generally understood as a kind of behavior in which people act not only in terms of their own personal interest but also to help other individuals, their communities, or society at large (Deutsch, 1975; Penner, Dovidio, Piliavin, & Schroeder, 2005). On a societal level, cooperation among individuals can take many forms, such as working as a volunteer, donating money, paying one's taxes, and participating in social movements. We refer to these kinds of societal-level behaviors as civic cooperation. Tyler and Blader (2003) proposed a psychological link between procedural justice and civic cooperation. In this section, we briefly outline their theoretical assumptions and review evidence bearing on this perspective.

The group-value model of procedural justice connects procedural justice to underlying relational motives (e.g., Tyler & Lind, 1992). The model suggests that individuals' evaluations of procedural justice are linked to the desire to maintain a reasonably high status in the social groups to which they belong. More precisely, Tyler (1994) argued that people use information about how they are treated by others to determine their own status within a group, organization, or society. Being treated fairly and with dignity communicates social acceptance (and reasonably high social status), whereas being treated unfairly and without respect is assumed to convey social rejection (and low social status). The group engagement model develops this logic to explain how procedural justice translates into cooperation with others (Tyler & Blader, 2003). On the basis of social identity theory (Tajfel & Turner, 1979), the authors argue that being treated fairly in a group, organization, or society enhances the pride and sense of identification that one gains from group membership. As a consequence, group-based goals and motives are activated, and people are more willing to advocate for collective interests and to cooperate with fellow group members (see also De Cremer & Tyler, 2005).

Most studies investigating the effects of procedural justice on cooperation have focused on organizational citizenship behaviors, that is, prosocial activities that help an organization but are not, strictly speaking, part of one's professional duty (for a meta-analysis, see Whitman, Caleo, Carpenter, Horner, & Bernerth, 2012). In addition, there is evidence that perceptions of procedural fairness can promote acts of civic cooperation, such as providing assistance to the police (e.g., Mazerolle, Bennett, Davis, Sargeant, & Manning, 2013). This body of research suggests that citizens' compliance with the law in general and police work in particular is enhanced when officers communicate in a manner that follows principles of procedural justice (e.g., Doyle, Gallery, Coyle, & Commissioners, 2009; Tyler & Huo, 2002; Wenzel, 2002). In one field experiment, for example, Australian taxpayers were more willing to file a tax declaration after they received a reminder letter that adhered to proce-

dural fairness criteria, in comparison with a standard reminder letter (Wenzel, 2006).

In conclusion, there are theoretical and empirical reasons to assume that a reciprocal relationship exists between perceptions of procedural justice and ascriptions of legitimacy to political authorities and institutions. Fairness heuristic theory suggests that there is a causal effect of perceptions of procedural justice on ascriptions of political legitimacy. On the other hand, SJT suggests that perceptions of political legitimacy (as well as other antecedents of system justification motivation) can foster perceptions of procedural justice. Importantly, however, the empirical evidence to date has been limited largely to cross-sectional data obtained in organizational contexts. There is a need for more empirical research addressing the bidirectional relationships between procedural justice and legitimacy in the political sphere (see also van der Toorn, Napier, & Dovidio, 2014). Given persistent concerns about declining rates of civic engagement and social capital in modern societies (e.g., Putnam, 2000), it would be especially fruitful to expand the scope of empirical research to investigate the ways in which procedural fairness can promote cooperation and participation in the realm of politics.

15.3   Perceived Injustice and Political Protest

In this section of the chapter, we provide an overview of models and variables that have been used to explain the individual's motivation to participate in political protest. Why is political protest an important topic in social justice research? One reason is that when researchers ask political activists *why* they protest, the most common answer involves the perception of social injustice (e.g., Wright, 2001). Justice appraisals, in other words, are strongly related to protest intentions. On most accounts, political protest is considered to be an expression of collective action, which may be defined as any action that is aimed at maintaining or enhancing the status of one's own group (e.g., Wright, 2001). Protest may also take

place outside of "normal" political channels or institutions; often it is initiated by oppositional movements. Examples include demonstrations, street blockades, and riots, as well as activities performed by individuals, such as signing a petition or donating money to support collective causes and social organizations.

15.3.1   Models Predicting Political Protest

Different branches of research in sociology, political science, and psychology suggest that three variables are especially important in predicting protest intentions. These are perceptions of *social injustice*, perceptions of group *efficacy* (individuals' beliefs that the group is strong enough to redress its grievances), and social *identification* (how important the group is for the individual, e.g., see Klandermans, 1997; van Stekelenburg & Klandermans, 2010; Van Zomeren, Postmes, & Spears, 2008). Next, we describe each of these three elements before introducing a model that combines them.

The perception of social injustice constitutes one of the most powerful predictors of collective action. In the collective action literature, both procedural and distributive justice perceptions play an important role. Members of disadvantaged groups can be motivated to engage in collective action because they evaluate the distribution of outcomes to be unfair (e.g., gender discrimination) or because they evaluate procedures to be unfair (e.g., when they are denied a voice). However, these justice perceptions are not necessarily differentiated. For instance, in their meta-analytic review, Van Zomeren et al. (2008) chose not to distinguish between justice perceptions based on unfair outcomes vs. unfair treatment and suggested that the relationship between various justice conceptions and collective action should be similar.

Long ago social scientists discovered that the *subjective* experience of deprivation, that is, the perception of *relative deprivation*, is typically more important than objective levels of deprivation when it comes to motivating protest behavior

(e.g., Stouffer, Suchman, DeVinney, Star, & Williams, 1949). A great many studies suggest that people are more likely to engage in collective action designed to ameliorate inequality when they view their own group as relatively deprived in comparison with a salient reference group (e.g., Runciman, 1966). However, people do not always perceive their own group as relatively deprived, even when there are good reasons for surmising that it is (e.g., see Jost & Kay, 2010).

In any case, political protest is not merely an emotional reaction to perceived social injustice. From a more deliberative (and perhaps rational) perspective, people are more likely to engage in collective action when they believe the expected value of the benefits of action to exceed the expected value of costs. In this calculation, much hinges upon perceptions of group efficacy, insofar as individuals are only willing to accept the risks of participation (which often include the potential for injury or arrest) to the extent that they believe that their group is likely to succeed (e.g., Kelly & Breinlinger, 1996; Mummendey, Kessler, Klink, & Mielke, 1999; Tausch et al., 2011; Van Zomeren, Spears, Fischer, & Leach, 2004). At the same time, recent research suggests that this may be more true for nondisruptive (i.e., normative) collective action (such as peaceful demonstrations) than for disruptive (i.e., nonnormative) collective action—actions that are not in line with societal norms such as violent protests. In fact, there is some evidence to suggest that group members will be more likely to choose disruptive forms of protest to the extent that they feel that the group will not be able to solve its grievances through nondisruptive channels (Tausch et al., 2011). Roughly speaking, reactions to these two types of situations correspond to the distinction between emotion-focused coping—in which anger in response to perceived injustice predicts protest—and problem-focused coping—in which group efficacy is the key to predicting protest behavior (e.g., Van Zomeren et al., 2004).

Finally, social identification is an important predictor of participation in political protest. According to social identity theory (Tajfel & Turner, 1979), people strive to maintain positive

group distinctiveness, and the more strongly an individual is identified with a given social group, the more likely he or she is to engage in collective action to improve the conditions of that group (e.g., Jost, Chaikalis-Petritsis, et al., 2012; Kelly & Breinlinger, 1996; Simon & Klandermans, 2001; Van Zomeren et al., 2004, 2008). Although identification with the relevant social group (such as women or gays and lesbians) predicts support for protest, politicized identification or "social movement identification" (e.g., identification with the feminist or gay and lesbian movement) is a much stronger predictor in general (Stürmer & Simon, 2004). This last fact suggests a bigger role for political ideology (and system justification motivation) than some models of collective action would portend (but see Jost, Chaikalis-Petritsis, et al., 2012)

Van Zomeren et al. (2008) considered the three elements of perceived injustice, collective self-efficacy, and social identification and proposed that social identity is central to collective action because it not only directly motivates protest behavior but also affects appraisals of injustice and efficacy. These researchers observed that feelings of injustice (which they labeled "affective injustice") were better predictors of support for protest than injustice appraisals based on cognitions ("nonaffective injustice"). Furthermore, work by Rothmund, Baumert, and Zinkernagel (2014) suggests that *justice sensitivity* from an observer's perspective (i.e., the tendency to experience anger when observing injustice directed at others) was more likely than *justice sensitivity* from a victim's perspective (i.e., the tendency to experience anger when thinking about injustice directed at the self) to predict self-reported anger about procedural injustice and protest behavior.

Despite the fact that researchers have identified several variables that are associated with protest intentions, actual participation in collective action is relatively rare, especially in view of the high levels of social, economic, and political inequality around the world (e.g., Jost & Kay, 2010). In the next paragraph, we discuss a number of social psychological barriers that may prevent individuals from engaging in protest.

15.3.2 System-Stabilizing Factors That Impede Political Protest

Why do people frequently fail to protest against the sources of disadvantage and deprivation? In this paragraph, we introduce three system-stabilizing factors that help to explain why members of disadvantaged groups would refrain from developing or simply lose interest in collective action: system justification processes, social creativity strategies, and cross-group contact between low- and high-status group members.

SJT proposes that people are motivated to justify and legitimize the status quo and thus the overall societal system (Jost & Banaji, 1994). This motivation can affect the belief structures not only of those who stand to benefit from the system but also of those who are disadvantaged by it. A person's belief in a just world, which reflects the desire to perceive the world as a fair place in which everyone gets what he or she deserves (Lerner, 1980), can be understood as an expression of system justification motivation (Jost & Hunyady, 2005). System-justifying beliefs, including the belief in a just world, increase people's acceptance of unequal outcomes and directly undermine their intentions to engage in protest against social injustice (e.g., Becker & Wright, 2011; Jost, Chaikalis-Petritsis, et al., 2012; Jost, Stern, & Kalkstein, 2012; Olson & Hafer, 2001; Wakslak, Jost, Tyler, & Chen, 2007). Moreover, the endorsement of system-justifying beliefs moderates the relation between relative deprivation and support for protest. For example, the association between feeling relatively deprived and supporting political mobilization on behalf of one's own group was attenuated for individuals who were high (vs. low) on system justification in a nationally representative sample in New Zealand (Osborne & Sibley, 2013). In sum, individuals who endorse system-justifying beliefs are less likely to perceive group-based discrimination, even when they suffer from discrimination themselves. And even if they perceive disadvantage, they do not necessarily take action; they may believe that their group deserves its lower status or that it is all part of God's plan or that things will turn out to be fine in the long run (e.g., Jost et al., 2014; see also Stroebe, 2013).

The second factor pertains to the lure of alternative strategies that members of disadvantaged groups can use to cope with (rather than challenge) an unjust situation. Within the framework of Social Identity Theory, Tajfel and Turner (1979) outlined three different strategies that members of disadvantaged groups can use to repair their negative (or stigmatized) images. First, as long as group boundaries are permeable, members of disadvantaged groups can exit the group, seek upward mobility on their own, such as admission in a higher status group. When group boundaries are impermeable and status differences between groups are perceived to be stable and legitimate, members of disadvantaged groups are more likely to engage in social creativity strategies, such as: (a) engaging in downward (rather than upward) social comparison, (b) emphasizing a novel dimension of comparison, and (c) redefining an externally defined negative group attribute as positive. A third identity management strategy is to participate in collective action aimed at bringing about social change; such action is most likely when group boundaries are impermeable and status relations are perceived to be illegitimate and unstable.

Research has revealed that the pursuit of individual upward mobility and at least two of the three social creativity strategies tend to weaken the motivation for collective action. Even when people believe that a very small minority of in-group members (i.e., "tokens") are able to enter a higher status group, their interest in protest is dramatically reduced (Wright & Taylor, 1999). Furthermore, when people engage in downward social comparison (by comparing their own group with a group that is even worse off), their interest in protesting against structural inequality is undermined (Becker, 2012). Likewise, when members of a low-status group compare their group to another group on a new (complementary) status dimension on which their in-group excels (e.g., when women compare themselves with men in terms of social skills rather than power), they lose interest in protesting because feelings of relative deprivation are dampened (Becker, 2012). The only identity maintenance strategy that did not undermine intentions to protest seems to be redefining a negatively imposed

group attribute as positive (e.g., "Black is beautiful"). In summary, then, the pursuit of alternative strategies for dealing with a stigmatized social identity may discourage participation in protest aimed at bringing about social change.

A third system-stabilizing factor has to do with potential conflicts between affective loyalties and the maintenance of a social change orientation; such a conflict may occur when members of a disadvantaged group have positive social contact with members of an advantaged out-group. Because intergroup contact is one of the most effective ways to reduce prejudice and to increase intergroup liking (e.g., Pettigrew & Tropp, 2008), it is at odds with certain group-based emotions (such as anger directed at the privileged out-group) that are important predictors of protest. Indeed, researchers discovered that having at least one friend belonging to the advantaged group reduces a disadvantaged group member's interest in participating in collective action aimed at redressing inequality (e.g., Dixon, Levine, Reicher, & Durrheim, 2012; Wright & Lubensky, 2009; see also Jost, Stern, et al., 2012). One way of avoiding (or overcoming) this dilemma is for members of disadvantaged groups to share their perceptions of the illegitimacy of the status quo in cross-group contact situations (Becker, Wright, Lubensky, & Zhou, 2013).

In summary, then, system-justifying beliefs and ideologies, identity management strategies, and conflicting loyalties all have the capacity to dampen perceptions of relative deprivation and social injustice. A scientific understanding of these three factors helps to address the question of why protest is as rare as it is, given the extent of inequality and exploitation that continues to exist in societies around the world.

15.4 Summary and Conclusions

In this chapter, we have reviewed the theoretical and empirical literature that addresses how social justice issues relate to the political thinking and engagement of laypersons. We outlined three dominant theoretical perspectives and reviewed empirical findings bearing on each. In this concluding segment, we highlight the primary findings as well as gaps in each of the three areas of research. Finally, we identify avenues for future research at the intersection of political psychology and social justice research.

To begin with, we reviewed empirical research demonstrating that there are systematic differences in how leftists (or liberals) and rightists (or conservatives) perceive and evaluate issues of social justice, especially when it comes to distributive justice (i.e., the distribution of benefits and burdens in society). These differences have to do with the perceived significance of social justice in moral judgments as well as the relative weightings of different principles of distributive justice (e.g., equality vs. merit). Based on SJT (Jost & van der Toorn, 2012) and social dominance theory (Sidanius & Pratto, 1999), these differences can be explained in motivational terms, at least in part. Such findings contribute to a social psychological understanding of ideological conflict, including the so-called "cultural divide" in the U.S. over controversial social and political issues (such as abortion, gun control, use of torture, immigration, and global warming).

One hopes that these findings will also suggest methods of conflict resolution. As Montada (2007) has argued, understanding and acknowledging different justice conceptions may provide an important step in the direction of addressing and ameliorating social conflict. There are other important tasks for future research as well. For example, it would be extremely valuable to bring a developmental perspective to bear on the question of how political attitudes and justice conceptions come together in late adolescence. What are the specific causal mechanisms responsible for political socialization and ideological development? Does the relationship between ideology and social justice change over the course of a lifetime? The satisfactory provision of answers to questions such as these will necessitate the use of longitudinal as well as experimental research designs.

In the second part of this chapter, we reviewed empirical research bearing on the reciprocal

relationships that exist between perceptions of procedural justice and political legitimacy. In line with fairness heuristic theory (Lind, 2001; Van den Bos, 2001), people often use procedural justice criteria as heuristic cues by which to evaluate the legitimacy and trustworthiness of authorities (e.g., Colquitt & Rodell, 2011; Van Dijke et al., 2010). Based on group engagement theory (Tyler & Blader, 2003), there is also evidence that perceptions of procedural justice can increase civic cooperation. At the same time, the more individuals perceive an authority to be legitimate, the more system justification motivation is expected to operate, possibly undermining sensitivity to procedural injustice. Research is needed to better understand the reciprocal relationships between perceptions of procedural (in)justice and perceived political legitimacy. For example, an avenue for future research would be to investigate how elements of procedural justice are applied instrumentally by political authorities to simulate legitimacy and trustworthiness, thereby forestalling resistance and rebellion. Indeed, some studies suggest that it can be relatively easy to undermine protest by promoting illusory perceptions that opportunities, including opportunities for voice, exist. For example, research suggests that as long as members of disadvantaged groups believe that a few members of their group are able to gain access to advantaged positions—even when the vast majority remains in a disadvantaged state—an individual's interest in protesting against structural inequality is dramatically reduced (see Wright, 2001). From a different angle, however, providing people with the feeling that they do have a voice could foster a sense of empowerment, and the expression of grievances could motivate further demands for social justice. Future research is needed to determine when procedural justice leads to the tolerance of inequality and justification of the status quo and when it leads to empowerment and increased motivation for social change.

In the third part of this chapter, we discussed social psychological variables that predict an individual's willingness to engage in collective action for social change. We noted that justice conceptions play a key role in motivating people to act against the source of their deprivation. After reviewing mechanisms that motivate people to participate in protest, we shifted our focus to factors that help to explain why many individuals are disinclined to take action against group-based disadvantage. We identified cognitive belief structures (such as system-justifying ideologies) and identity management strategies (i.e., social creativity) as key factors that, along with conflicting loyalties, help to explain why protest is relatively rare. Future work should examine how system justification on the part of the disadvantaged may be overcome so that people will be more accurate in their perceptions of relative deprivation and social injustice and therefore more motivated to exhibit political solidarity and participate in collective action (e.g., see Subašić, Reynolds, & Turner, 2008).

It should be noted that justice concerns may also encourage the advantaged to support policies that result in the redistribution of economic resources and, in this sense, may be contrary to their own economic self-interest (Smith & Tyler, 1996). Protests are likely to be more successful to the extent that they are able to gain allies from privileged groups as well as third-party observers. Future research is needed to determine how members of highly diverse groups can work together with the shared motivation to ameliorate social injustice. Insofar as collective action researchers have not distinguished between the effects of distributive and procedural injustice, more work is needed to determine whether these two types of appraisals have different ramifications for participation in collective action.

Returning to a more general consideration, we wish to acknowledge that we have not provided an exhaustive overview of the ways in which social justice considerations are related to political thought and action (see Jost & Kay, 2010, for a more lengthy discussion). For one thing, there is a growing body of research on the roles of forgiveness and reconciliation in treating the psychological consequences of political violence and intergroup conflict (e.g., see Amstutz, 2006). This work, which links political reconciliation to theory and research on restorative justice (see Cohen, 2016, Chap. 14 of this handbook), has

been inspired and promoted by institutional interventions such as the South African Truth and Reconciliation Commission (Gibson, 2006). There are also lines of research that have recently garnered scientific interest because of political, economic, or technological developments. For instance, interest has surged in the question of how internet-based forms of political communication (e.g., the role of Twitter during the "Arab Spring"; Bruns, Highfield, & Burgess, 2013) and political engagement (e.g., direct forms of democracy in e-government; Kang & Gearhart, 2010) affect the social psychological processing of information about social injustice and protest behavior. Along these lines, Besley and McComas (2005) proposed a framework for integrating the theoretical insights of research on procedural justice and political communication.

We began this chapter by suggesting that social justice is at the very heart of political action. We conclude by noting that the realm of politics routinely reflects the application of fundamental social justice principles. Psychological studies at the intersection of social justice and political behavior are part and parcel of a vibrant, growing subfield of research. This subfield provides key insights for addressing theoretical and practical questions in politics and offers promising avenues for future exploration, especially in light of new technologies associated with social media.

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Social Justice and the Welfare State: Institutions, Outcomes, and Attitudes in Comparative Perspective

16

Patrick Sachweh

16.1 Introduction

"Justice is the first virtue of social institutions," John Rawls famously remarks in the opening pages of his theory of justice (Rawls, 1973, p. 3). Within the institutional architecture of Western capitalist societies, welfare state policies are among the most important mechanisms devised to ensure and uphold a certain degree of social justice, that is, a distribution of goods, positions, and burdens considered fair (White, 2010).[1] In reaction to the social disruptions caused by the emergence of the capitalist mode of production in Western Europe at the end of the nineteenth century—and its concomitants of urbanization, mass mobilization, and population growth—formal institutions of social protection gradually began to replace traditional safety nets, such as the community or the family, in order to protect workers and their families against the vagaries of the market (Marshall, 1949/1993; Wilensky, 1975). Originating in insurances against work accidents, sickness, and old age, welfare arrangements in Western Europe continuously expanded after the Second World War,

embracing ever larger segments of the population and addressing an increasing number of social problems (Myles & Quadagno, 2002). However, as mass unemployment began to strain national budgets after the oil crisis of the 1970s, this expansionary phase came to a halt, and the last two decades have seen a phase of profound welfare state restructuring and—in some policy fields and countries—retrenchment during which benefit levels have been cut and social rights have been curtailed (Korpi, 2003; Myles & Quadagno, 2002).

Yet, despite claims of convergence or a purported "race to the bottom," the institutional design of contemporary welfare states still differs considerably across the industrialized countries of the OECD world (Arts & Gelissen, 2002; Castles & Mitchell, 1993; Esping-Andersen, 1990; Huber & Stephens, 2005; Leibfried, 1992)—and so does the emphasis welfare states give to different principles of social justice, the extent to which they realize these principles through their programs and policies, and what their citizens regard as just. In this chapter, I will map out and discuss the relationship between social justice and the welfare state on the institutional, social-structural, and attitudinal level from a cross-national perspective. In doing so, I mostly follow Esping-Andersen's (1990) distinction between liberal, conservative, and social-democratic welfare regimes.[2]

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[1] Although one could argue that welfare state institutions also incorporate specific principles of procedural justice, I focus on distributive justice as their primary aim.

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[2] While widely referred to, Esping-Andersen's (1990) welfare regime typology was also subject to various forms of criticism, e.g., regarding the number of ideal-typical

Regarding the *institutional level*, I ask: To what extent do different welfare states, due to differences in their institutional design, embody different notions of social justice, and what does this imply for their evaluation by their citizens? For instance, some policies, such as the universal social programs found in many Scandinavian countries, may be seen to rest upon strong egalitarian impulses and receive broad popular support, while others, such as the means-tested programs typical of many Anglo-Saxon nations, only grant a minimum level of benefits to meet the most basic needs and are often met with suspicion by the public (Arts & Gelissen, 2002; Esping-Andersen, 1990; Korpi & Palme, 1998).

On the *social-structural level*, I ask in how far the outcomes of different welfare states correspond to certain conceptions of social justice. This is important because welfare states not only differ in their institutionalized justice principles but also in the extent to which their real-world outcomes—for example, the degree of inequality, poverty, or socioeconomic (in)security across individuals' life course—actually correspond to these notions, that is, the extent to which they actually *achieve* justice (Bradley, Huber, Moller, Nielsen, & Stephens, 2003; Goodin, Headey, Muffels, & Dirven, 1999).

Finally, on the *attitudinal level*, I ask how citizens themselves view the welfare state they live in and how these views are affected by their support for various principles of social justice. Importantly, the issue of social justice in the welfare state is not only a matter of academic debate but also contested among citizens, particularly in an era of ongoing welfare state reform and retrenchment. Thus, how popular conceptions and understandings of social justice relate to the institutional structure of welfare states, how they vary cross-nationally, and how they affect popular support for the welfare state also demands attention (Arts & Gelissen, 2001; Miller, 1992).

Before I explore these three questions, I briefly elaborate the notion of social justice underlying this chapter and its relation to welfare state politics in Sect. 16.2. Sections 16.3–16.5 then map out the relationship between social justice and the welfare state on the institutional, social-structural, and attitudinal level, respectively. Finally, Sect. 16.6 discusses whether—and how—conceptions of social justice have changed in conjunction with major institutional reforms that have occurred in many OECD welfare states within the last two decades, and what this implies for the future development of the welfare state.

16.2 Principles of Social Justice and the Welfare State

While the importance of the idea of "social justice" for welfare state politics may appear intuitively obvious, what precisely is meant by social justice within this context is not clear. In this chapter, I rely on Miller's (1999) tripartite conception of social justice and its principles of equality, need, and merit. Such a pluralist understanding is useful in the present context for two reasons: First, both normative philosophy and empirical justice research share the view that neither political actors nor ordinary citizens formulate justice judgments according to a single principle (Deutsch, 1975; Hochschild, 1981; Törnblom & Foa, 1983; Walzer, 1983). Therefore, in implementing and evaluating welfare state policies, different criteria may be applied. This also implies that, second, within different welfare states different notions of social justice are combined in specific ways, giving priority to one or another ideal. A differentiated understanding of social justice is thus necessary in order to capture the specific configurations of justice principles encapsulated in different welfare arrangements (Arts & Gelissen, 2001).

Equality is perhaps the most common conception of social justice implicitly or explicitly underlying much thinking about the welfare state. The British sociologist Marshall

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welfare regimes (Castles & Mitchell, 1993; Korpi & Palme, 1998; Leibfried, 1992), its empirical validity (Obinger & Wagschal, 1998), or its gender-blindness (Orloff, 1993). Yet, because much empirical research refers to the typology in its original form, I follow the original classification for the most part of this chapter. For an overview on the debate, see Arts and Gelissen (2002).

(1949/1993), for instance, conceptualized the modern welfare state as the culmination of a three-stage evolution of citizenship rights, ranging from civic over political to social rights. Social rights are universal entitlements vis-à-vis the state that guarantee each citizen a real income independent of her or his success in the market, thereby representing, in Marshall's terms, a "drive towards greater social and economic equality" (Marshall, 1949/1993, p. 28).[3] Similarly, Flora, Alber, and Kohl (1977, p. 721) have defined equality as a primary goal of the welfare state, next to providing security against the uncertainties in citizens' life courses (Moene & Wallerstein, 2001).

Yet, the meaning of equality is not unambiguous. Most basically, one can differentiate between equality of opportunity and equality of outcome (Flora et al., 1977, pp. 722–723). Equality of opportunity refers to the chances each member of society has in obtaining valued goods and resources, and one of the prime policy fields where this is addressed is education.[4] Equality of outcome, by contrast, refers to the idea that specific valued goods and resources within a society should be distributed (more) equally, and welfare states have more or less pronounced redistributive elements built into their institutional architecture (e.g., progressive taxation, etc.) in order to achieve a more egalitarian distribution of resources (Bradley et al., 2003; Korpi & Palme, 1998). Importantly, both conceptions of equality matter in the context of welfare state politics, albeit their relative importance varies historically as well as cross-nationally (cf. Sect. 16.3.1).

Another important principle of social justice in the welfare state context is *need*. Unlike equality, which ensures citizens equal social rights independent of their individual attributes or their socioeconomic standing, the principle of need provides resources to citizens in response to their demonstrable need. This implies that before resources are granted, means testing is applied in order to ensure that claimants cannot rely on any other resources, either provided by their families or by other social programs (Titmuss, 1968). Furthermore, the principle of need does not refer to the fulfillment of idiosyncratic "wants" or "desires" but to the satisfaction of socially defined and collectively validated needs (Miller, 1999, pp. 203–205). Thus, legitimate needs are identified with reference to shared social norms about what makes up a "normal human life" (Miller, 1999, p. 210), and the task of social policy then becomes to bring about the conditions which enable people to lead a "minimally decent life in their society" (Miller, 1999, p. 210). In this sense, providing citizens with a basic minimum of resources in order to prevent poverty and material deprivation and to ensure that each can enjoy a minimum standard of living is an essential component of welfare states (White, 2010). However, as will be seen later, defining what counts as legitimate need—as well as claiming them—is potentially contested and subject to debate (Fraser, 1990).

Finally, the concept of *merit* may at first sight not appear intuitively relevant to welfare state politics. The principle of merit, or desert,[5] posits that "a person deserves some benefit by virtue of some performance or attribute" (Miller, 1999, p. 133), and that returns to contributions or performances should follow the principle of equivalence (Miller, 1999, p. 141). In fact, conservative critics of the welfare state often argue that encompassing welfare provision represents a disincentive which crowds out individuals' work ethic and ambition, thus undermining a "meritocratic" social order (Mead, 1986; Murray, 1984). Along

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[3] Yet, Marshall recognized that this drive is limited and that welfare state policies may also represent an "instrument of stratification" (Marshall, 1949/1993, p. 39).

[4] However, apart from the Anglo-Saxon tradition (Marshall, 1949/1993), comparative welfare state research in Continental Europe has for a long time tended not to regard education as part of welfare state policy, a fact that is changing recently with the emerging focus on "social investment" (Morel et al., 2012).

[5] Miller (1999, p. 137) differentiates between desert (a person deserves a benefit due to his or her performance) and merit (a person's personal attributes—partly based on past performances serving as an indicator of future performance—make him or her deserving of a good). For the present purposes, to differentiate between current, past, or future performance is not overly important. Thus, I use both concepts interchangeably.

these lines, when the media and popular discourse portray welfare claimants as work-shy, unproductive scroungers who are cheating the system and therefore undeserving of the benefits they receive, merit seems to be relevant primarily as a negative contrast (Gans, 1995; Katz, 1989). However, a more thorough reflection of the role of merit in the welfare state also should take into account the "meritocratic" elements that are built into many social insurance schemes, as they are typical of conservative welfare regimes. Here, benefit receipt and replacement rates are strongly related to prior contributions in order to make benefits attractive to the middle class (Mau & Sachweh, 2013). The notion of merit thus forms not only a negative background against which the behavior of the alleged "undeserving poor" is measured but is also a construction principle deliberately built into social insurance schemes.

16.3 Welfare States and Institutionalized Conceptions of Social Justice

This section maps out the ways in which equality, need, and merit underlie the institutional architectures of different welfare arrangements, therein essentially following established distinctions between different varieties of welfare capitalism (Castles & Mitchell, 1993; Esping-Andersen, 1990). Drawing on a theoretical perspective which can be described as "normative institutionalism" (March & Olsen, 1989), welfare arrangements are regarded not only as formal rules regulating the management of social risks but also as embodiments of specific ideas about a just social order (Titmuss, 1970).[6] In this

sense, welfare state institutions are assumed to possess a moral quality that can resonate with citizens' normative orientations and social values in different ways, thereby either enhancing or undermining public support for the welfare state (Rothstein, 1998; Steensland, 2008). Importantly, while the following sections aim to uncover the dominant justice principle underlying different welfare regimes, real-world welfare arrangements rest on more than one justice principle, often combining multiple ideals in specific ways.[7] Therefore, each section also briefly discusses relevant secondary justice principles in each regime.

16.3.1 Social Justice in the Social-Democratic Welfare State

The institutional core of social-democratic welfare states, as they are characteristic of the Scandinavian nations, is usually made up of universal social programs that grant equal social rights to all citizens, regardless of income or status, and that are financed through general taxation (Esping-Andersen, 1990; Korpi & Palme, 1998). Benefits are strongly decommodifying in their effect, that is, they enable citizens to uphold a social acceptable standard of living independent of their success in the market (Esping-Andersen, 1990). Hence, social democratic welfare states are said to rest upon a "genuinely universalistic idea of solidarity" (Esping-

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[6] In the social policy literature, this perspective goes back to Richard Titmuss' comparative study on blood donation in Great Britain and the US (Titmuss, 1970). Titmuss found that the system of voluntary blood donation organized by the British National Health Service (NHS) generated a greater supply and better quality of blood than the commercial blood banking system of the US—a fact he attributed to the universalist institutional structure of the NHS which "allowed and encouraged sentiments of altruism, reciprocity and social duty to express themselves" (Titmuss, 1970, p. 225). Thus, the institutional design of

social policies incorporates specific social values that in turn foster the development of feelings of social solidarity and mutual obligation among citizens.

[7] One may argue that social justice is not the only value that is relevant in the context of the welfare state. While many social scientists and social policy practitioners would not doubt its importance, some neoclassical economists such as Hayek (1959) have claimed that the welfare state's focus on bringing about greater social justice is misguided and in fact undermines more fundamental values, especially liberty. In a similar vein, also social scientists have pointed to the ambivalent relationship of (some particular forms of) welfare state institutions to individual autonomy (for an overview, see Leisering, 2001). In sum, however, social justice is likely to retain an important place in the normative repertoire of welfare states, not least due to its multiple and also changing meanings.

Andersen, 1990, p. 67) and "promote equality of status" (Esping-Andersen, 1990, p. 25).

Equality can thus be seen as one of the central normative ideals underlying the universal welfare model (cf. Kautto, 2010, p. 589; Mau, 2003, p. 39; Torp, 2011). Within this context, both equality of outcome and equality of opportunity are important for welfare state politics, although their relative significance varies historically as well as cross-nationally. In cross-national perspective, social-democratic welfare states stand out with regard to policies aiming at greater equality of outcome, which receive more attention here than in conservative or liberal welfare regimes (Kenworthy, 2004; Korpi & Palme, 1998). Although even these generous and encompassing Scandinavian welfare states do not aim at a far-reaching "leveling" of citizens' living conditions and tolerate a certain degree of socioeconomic inequality resulting from differences in individuals' labor market outcomes, economic inequality is generally lower than in liberal or conservative regimes (Goodin et al., 1999; Korpi & Palme, 1998). Recently, however, one can observe a shift away from a traditional focus on redistribution (or equality of outcome) toward an increasing emphasis on equality of opportunity under the label "social investment" (Morel, Palier, & Palme, 2012). Yet, the Scandinavian welfare states have always been strong in achieving high levels of equality of opportunity (Erikson & Goldthorpe, 1992; Erikson & Jonsson, 1996), a fact that some observers attribute to the "dual-earner" family policies pursued in these welfare regimes (Sørensen, 2006). Furthermore, empirical studies show that while current reforms may place less emphasis on socioeconomic equality, many nations have in fact intensified redistribution in response to increasing market inequality (Kenworthy & Pontusson, 2005). In sum, therefore, both notions of equality appear to be important, as the social-democratic welfare regime aims to combine relatively high equality of outcomes with high levels of equality of opportunity (White, 2010).

The focus on equality of universal welfare arrangements has important implications for their political support. In his book "Just Institutions Matter," Rothstein (1998) argues that universal social policies receive more widespread popular support than selective ones because they embody a specific "moral logic" which creates and fosters among the population social norms that reproduce this type of policy. According to this moral logic, universal social rights treat all citizens with equal concern and respect and focus on the well-being of the entire community (Rothstein, 1998, p. 159). As eligibility criteria for universal policies can be framed simply (e.g., via age thresholds), they are easy to implement, and they often embrace their beneficiaries as contributors (Rothstein, 1998, pp. 156–166). In sum, therefore, universal social policies can be argued to be *substantially* and *procedurally just*—that is, their goals are regarded as just and they are carried out in a fair manner—while they also distribute *burdens fairly*, that is, citizens can be sure that others contribute their share as well. Within such an institutional design, normative orientations among citizens are expected to flourish which propel its legitimacy. "Human agency, as conceptualized in universalist programmes," Mau (2003, p. 38) writes, "is predominantly public-spirited, enabling social transactions across class boundaries and deploying norms of generalized reciprocity. By stressing the collective character of provision the institutional patterns are said to enhance the moral capacity of citizens." By contrast, selective policies, as they are typical of many liberal welfare regimes, differ from universal ones in ways which contribute to an erosion of their popular support (see next section).

Yet, as mentioned at the beginning of this chapter, equality is not the only justice principle that matters for social policy in social-democratic welfare regimes (Kildal & Kuhnle, 2005). Selective policies granting means-tested benefits according to demonstrable need or income-related elements designed to maintain individuals' socioeconomic status in specific life phases also play a role, thus complementing the egalitarian thrust of Scandinavian welfare regimes and embedding it in other normative principles, such as need and merit (Kautto, 2010). However, especially in comparison to other welfare regimes, the social-democratic welfare state still stands out with regard to its egalitarian character.

16.3.2 Social Justice in the Liberal Welfare State

Liberal welfare regimes, as they are characteristic of the Anglo-Saxon nations, may appear as the reverse image of the encompassing universal welfare states (Castles, 2010; Esping-Andersen, 1990). While for the well-off citizens social services are provided via the market, either directly or through private social insurances, the most important measures of social protection for the less well-off are means-tested income maintenance or poor-relief programs aiming at the "certifiably needy" (Esping-Andersen, 1990, p. 43). Benefits are provided only if no other support, for example, by the family, is available and are contingent upon the execution of means tests. The levels of cash benefits is only weakly decommodifying while in-kind benefits may also play a role in such programs (Titmuss, 1968). Hence, the principle of *need* appears to be the primary notion of social justice that orients the institutional design of social policy in liberal welfare states (Torp, 2011; White, 2010, p. 23), and public schemes usually do not cater for more than the fulfillment of citizens' basic needs in order to secure the ability to lead a "minimally decent life" (Miller, 1999, p. 210).

However, what counts as a necessary requirement of a "minimally decent life," and thus as legitimate need, is subject to debate and to "interpretive contests" which are structured unequally. As Nancy Fraser notes, "needs-talk appears as a site of struggle where groups with unequal discursive (and non-discursive) resources compete to establish as hegemonic their respective interpretations of legitimate social needs. Dominant groups articulate need interpretations intended to exclude, defuse, and/or co-opt counter interpretations. Subordinate or oppositional groups, on the other hand, articulate need interpretations intended to challenge, displace, and/or modify dominant ones" (Fraser, 1990, p. 164). Hence, this suggests that while the principle of need may serve to justify the provision of essential goods and resources, it may also prove as a shaky ground upon which to voice one's claims due to the power asymmetries involved. Indeed, in liberal welfare states public debates about welfare fraud and misuse abound, thus creating popular suspicion about the legitimacy of welfare recipients' needs (Golding & Middleton, 1982; Larsen & Dejgaard, 2013; Murray, 1984).

It is not accidental that this kind of popular discourse arises in liberal welfare regimes. Early on, Richard Titmuss has pointed out the stigmatizing effects of selective institutional designs: "If all services are provided […] on a discriminatory, means-test basis," Titmuss (1968, p. 134) asks rhetorically, "do we not foster both the sense of personal failure and the stigma of public burden?" The way in which selective institutions contribute to this stigmatization of their beneficiaries has been elaborated by Rothstein (1998). Via the administration of means tests, selective policies separate those in need from those who are not, and this "very act of separating out the needy almost always stamps them as socially inferior" (Rothstein, 1998, p. 158). Hence, the implicit concern embodied within selective policies revolves around what the (well-adjusted) majority should do about the maladjusted minority. Additionally, selective policies often face problems of implementation and allow administrators personal discretion in the granting of benefits, thereby provoking the abuse of bureaucratic power and fraud on the part of the clients. While these issues undermine the perception of selective policies as substantially and procedurally just, the granting of assistance only to those who cannot provide for themselves—and who therefore do not contribute economically—also implies an asymmetrical distribution of financial burdens (Rothstein, 1998, pp. 160–164). In sum, according to the moral logic of selective (i.e., liberal) welfare institutions "citizens have reason to distrust both the government institutions and their fellow citizens" (Rothstein, 1998, p. 169)—a fact ultimately undermining public support for these schemes (Larsen, 2008).

Yet, need is not the only relevant justice principle in the normative architecture of liberal welfare regimes. *Merit* is also important. First, because most public social programs that operate

according to need only cater for the least well-off, providing for one's own welfare is each citizen's private responsibility. Therefore, the liberal welfare regime rewards those willing and able to purchase welfare and service provision on the market (e.g., health care, old-age security), thereby maintaining—and to some extent probably deepening—preexisting economic disparities. Second, reforms of minimum income protection originating in the Anglo-Saxon nations—as for example introduced by the Clinton Administration ("ending welfare as we know it")—have increased the conditionality of benefits, partly in response to discourses about welfare fraud and misuse. For instance, the receipt of social assistance has been made increasingly dependent upon the fulfillment of tightened eligibility rules and goes along with stricter means testing or toughened work requirements (Clasen & Clegg, 2011). Thus, insofar as benefits are now made contingent upon claimants' "performance," this can be interpreted as an attempt to introduce "meritocratic" elements into selective social policies. In sum, however, the granting of public benefits in the liberal welfare regime to a considerable degree still rests on need, with recent reforms making the demonstration of "legitimate need" more difficult.

16.3.3 Social Justice and the Conservative Welfare State

Conservative welfare regimes, as they are typical of the Continental European nations, primarily organize social protection through social insurance schemes. They offer earnings-related benefits designed to maintain one's standard of living the face of crucial life course events (Esping-Andersen, 1990; Palier, 2010). Thus, the programmatic structures of social insurance systems are oriented toward income replacement, thereby perpetuating inequalities originating in the market. Mostly, these schemes redistribute income over the life span, where payments made from market income in phases of employment compensate income losses in the event of unemployment or retirement (Mau, 2004, p. 67). The main focus of the conservative welfare model is on social integration, understood as the maintenance of social order and hierarchy, and on creating loyalty toward the state (Esping-Andersen, 1990, p. 40; Offe, 1998). In providing income security and stability, it emphasizes horizontal redistribution across the life course instead of vertical redistribution between classes.

In order to provide status-maintaining benefits, the institutional design of the conservative or "Bismarckian" welfare model (Palier, 2010) strongly adheres to a logic of *equivalence* akin to insurance systems, "where payments are made with the expectation of equivalent returns" (Mau, 2004, p. 67). This way of linking the replacement rate of benefits to the level (and in some cases also the length) of prior contributions can be interpreted to inscribe a "meritocratic" element into the institutional design of social insurance systems (Torp, 2011). As Miller has argued, the principle of merit demands that equal contributions should produce the same rewards, while higher (or lower) contributions should lead to higher (or lower) rewards (Miller, 1999, p. 141). Thus, the moral logic that channels the flow of resources within Bismarckian social insurance systems implies "not only that everyone participating is benefiting, but also that those who have contributed more will benefit more" (Mau, 2004, p. 67). It is this specific logic, which does not aim at vertical redistribution but instead maintains and perpetuates prior inequalities, that marks the "conservative" element of social insurance schemes.

What are the implications of the institutional design of conservative welfare regimes for their political support? As the Bismarckian welfare arrangement promises those insured, to a certain extent, what they have paid for and minimizes cross-class redistribution, it has been said to be easy to legitimize. For instance, Offe (1991, p. 129) has argued that this kind of institutional architecture is "morally undemanding" because "no one needs to believe in lofty principles of solidarity, justice, or equality to become—and

remain—a rational supporter of the system […]. Its modest goal is the guarantee of income—and of relative income status!—for employees and their dependants." Along these lines, Ullrich (2008, pp. 198–205) has shown with respect to the German case that meritocratic justice orientations on the part of the citizens also increase their support for the German pension insurance scheme (which is largely structured along the above lines), while support for social assistance—that is, residual, means-tested minimum income support—is dependent upon individuals' adherence to the principle of need (cf. also Sachweh, Ullrich, & Christoph, 2007).

In sum, therefore, merit appears to be the primary notion of social justice built into the institutional architecture of Bismarckian or conservative welfare arrangements, especially the social insurances. However, other principles are also relevant with regard to specific programs, for instance the idea of need with respect to means-tested minimum protection or equality with regard to certain family benefits (Alber, 2003; Offe, 1998).

16.3.4 Social Justice Beyond the Three Worlds of Welfare Capitalism

Critics of Esping-Andersen's regime typology have suggested adding further regime types in order to accommodate otherwise ambiguous cases. Especially the distinctiveness of the Southern European countries has been pointed out early on, and they are now frequently singled out as a "Mediterranean" welfare regime (Arts & Gelissen, 2002; Leibfried, 1992). Among the defining characteristics of this regime are: the fragmented character of social protection, with "dualist" systems of protection providing generous benefits (via social insurance) for labor market insiders and meager subsidies for outsiders; the absence of a defined social minimum; the provision of universal healthcare as a right of citizenship; and the high significance of the family in providing social security (Arts & Gelissen, 2002, p. 145; Ferrera, 2010, p. 621). Given this peculiar institutional architecture, dominant

notions of justice underlying the Mediterranean welfare regime are less clear to delineate than with regard to the previous regimes. Rather, the Southern European countries appear to combine egalitarian notions of equal social citizenship (e.g., healthcare) with differentiating "meritocratic" insurance-type elements in complex, and probably incoherent, ways.

Furthermore, beyond Western Europe emerging welfare state regimes can be identified in Latin America, East Asia, and Eastern Europe. Yet, as research on the values underlying the institutional architecture of these welfare states is still under way, reconstructing their notions of justice is beyond the scope of this chapter (but see Rieger & Leibfried, 2003).

16.4 Welfare State Outcomes and Social Justice

Justice is not only an important normative element in the institutional design of welfare states. We can also ask in how far social policies actually bring about societal conditions that can be considered just. Drawing on equality, need, and merit, we can ask: Does the welfare state promote greater equality, both by reducing wide socioeconomic disparities and by making opportunities more equal? Does it ensure that people's basic needs are met? Does it help citizens to maintain the standard of living they have achieved across different stages of their life course? To pose such questions is to inquire about the social-structural consequences of welfare state politics. Drawing on a large and growing literature that can only be covered selectively here (Bradley et al., 2003; Brady, 2006; Goodin et al., 1999; Moller, Misra, & Strader, 2013; Saunders, 2010) this section aims to provide some clues to these issues.

16.4.1 Equalizing Outcomes and Opportunities

To what extent does the welfare state contribute to the realization of greater equality, both by

reducing inequality of outcomes and by reducing inequality of opportunity?

In order to assess the inequality of outcomes, income inequality is a useful indicator. Comparative research demonstrates that—as in the case of poverty—income inequality is typically lowest in Scandinavia and highest in the Anglo-Saxon nations, with the Continental European countries lying in between (Bradley et al., 2003; Goodin et al., 1999; Korpi & Palme, 1998). The impact of welfare state policies on income inequality is usually assessed by comparing inequality in market incomes, that is, before taxes and transfers, with inequality in disposable incomes, that is, after taxes and transfers. Following this approach, several studies demonstrate that the welfare state substantially reduces income inequality in the Nordic and also the Continental European countries, while the impact of taxes and transfers in the Anglo-Saxon nations is modest (Kammer, Niehues, & Peichl, 2012; Korpi & Palme, 1998). For instance, Bradley et al. (2003, p. 210) show that while in Sweden taxes and transfers reduce Gini measures for posttax/transfer inequality by 38 % (compared to pretax/transfer Gini values), in the US market inequality is reduced only by 17 %. Furthermore, mean values for the three welfare regimes illustrate that on average—and variations within country clusters notwithstanding—inequality reduction is greatest in social-democratic and smallest in liberal welfare states, with the conservative regimes lying in between (Bradley et al., 2003, p. 210). Recent figures, such as those in Table 16.1, show that across welfare regimes, the redistributive impact of social policy has increased over the past decades in response to rising market inequality (cf. also Kenworthy & Pontusson, 2005), while the relative differences in redistributive capacity remain.

Yet, inequality of outcomes is not the only important aspect in evaluating the equalizing impact of social policy. Also relevant is in how far different welfare state regimes contribute to an equalization of opportunities (Esping-Andersen, 2004, 2005). While this potentially addresses a wide spectrum of policies and measures, I will discuss two issues currently at the forefront of academic and public debate:

class-specific educational disparities and women's labor market prospects.

Educational disparities matter because stratification research has shown that social mobility—that is, the link between an individual's social origin (i.e., social class) and his or her occupational destination—is decisively moderated by education (Blau & Duncan, 1967; Hout & DiPrete, 2006). The less an individual's educational attainment depends on the socioeconomic status of his or her family of origin, and the more his occupational destination is influenced by his or her education, the more equality of opportunity exists, and the more "meritocratic" a given country can be interpreted to be. Yet, while it has often been argued that cross-national differences in social fluidity are related to a country's educational system (Beller & Hout, 2006, p. 354), in many countries the educational expansion of the 1970s has not lead to greater equality of opportunity, thus contradicting the optimistic assumptions at that time (Shavit & Blossfeld, 1993).

However, the studies in Breen (2004) demonstrate that nevertheless substantial cross-national variation in the extent of social mobility exists. Among the countries showing the greatest degree of social mobility (or fluidity) are the Scandinavian nations, in particular Sweden and Norway. By contrast, the most rigid patterns of stratification are found in the Continental European and Mediterranean countries, such as Germany, France, or Italy (Breen & Luijkx, 2004, p. 73). Similarly, Esping-Andersen (2004, pp. 124–126) shows that in Denmark, Norway, and Sweden the influence of social origin (measured via father's education) on the transition to secondary or tertiary education has weakened for younger birth cohorts, whereas in the US and Germany the association resembles the "constant flux" pattern described by Erikson and Goldthorpe (1992), that is, a trendless fluctuation.

While we know little about the causes of this cross-national variation (Breen & Jonsson, 2005),[8] it is apparent that—in the Western

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[8] In a comprehensive review article, Breen and Jonsson (2005, p. 236) conclude that "convincing explanations of […] cross-national variation in the origin-education or origin–destination associations are lacking."

Table 16.1 Income inequality before and after taxes and transfers in different welfare regimes, 2010

	Pretax and transfer Gini	Posttax and transfer Gini	Reduction in Gini due to taxes and transfers (in %)
Social-democratic welfare states			
Sweden	0.44	0.27	39
Norway	0.42	0.25	40
Denmark	0.43	0.25	42
Finland	0.48	0.26	46
Mean	0.44	0.26	41.8
Conservative welfare states			
Netherlands	0.42	0.29	31
Germany	0.49	0.29	41
France	0.51	0.30	41
Belgium	0.48	0.26	46
Italy	0.50	0.32	36
Mean	0.48	0.29	39.8
Liberal welfare states			
Australia	0.47	0.33	30
Canada	0.45	0.32	29
UK	0.52	0.34	35
US	0.50	0.38	24
Mean	0.49	0.34	29.5

Source: authors own calculations, based on OECD data (http://stats.oecd.org/index.aspx?queryid=46022)

world—social-democratic welfare regimes achieve the greatest degree of equality of opportunity (Sørensen, 2006). Although few studies explicitly take into account the welfare state, recently several authors have started to look more closely into the possible influence of social policy on inequality of opportunity (Beller & Hout, 2006; Esping-Andersen, 2004, 2005, 2009; Sørensen, 2006). This research suggests that in fact several distinct paths toward weakening the link between social origin and educational or occupational destination may exist. For instance, Beller and Hout (2006, p. 362) find that in liberal and conservative welfare states, rates of social fluidity are high when access to higher education is high, but rates of social fluidity are lower when access to higher education is low. Hence, in those liberal and conservative countries where a greater share of the population has access to postsecondary education, higher education indeed appears as a pathway to social mobility. In

this case, equalizing access to tertiary education becomes a crucial issue. Yet, we know from the US that while the proportion of the population participating in postsecondary education is higher than in many European countries, access to tertiary education is also more unequal (Goodin et al., 1999, p. 179). Hence, in the US inequality of outcomes does not seem to be offset by greater mobility.

By contrast, social-democratic welfare regimes promote greater equality of opportunity independent of access to higher education. Sørensen (2006) has suggested that this may be due to the fact that socioeconomic inequalities between families are mitigated by the Scandinavian dual earner model of family policy, which is characterized by parental leaves with generous income replacement, a strong encouragement of female labor force participation, and the availability of public childcare from early childhood on. Encouraging female labor force participation may reduce child poverty, especially in single-earner households, and equalize overall household incomes, thus resulting in improved conditions for educational attainment and a less unequal distribution of resources that families can invest into their children's education (see also Esping-Andersen, 2009, pp. 122–127). Moreover, high-quality public childcare may contribute to a homogenization of sociocultural milieus, which in turn might equalize the cognitive abilities of small children. Along this line, Sørensen (2006, p. 372) argues that "family policies as we find them in the social democratic welfare state may contribute to the equalization of learning and developmental opportunities in early childhood, which should in turn weaken the effects of social background on children's cognitive development."

This leads to the second issue relevant for equal opportunities, the promotion of female labor market participation. While the above discussion suggests that family policies that support a "dual earner"-family model may help to tackle educational disparities, they do so unintentionally. Historically, the support of female labor market participation via family policies in the Scandinavian countries is related to the fact that

the social-democratic welfare state imposes a high tax burden on citizens in order to finance its benefits and services (Kautto, 2010). Therefore, it requires that a large share of the population, including women, participates in the labor market. Hence, well-paid maternity leaves and the provision of public childcare support mothers' labor market participation while at the same time they positively affect their wages and reduce poverty among single mothers (and their children) (Moller et al., 2013, p. 140). Moreover, the encompassing Scandinavian welfare states directly promote women's employment by providing jobs in large public sectors, for example, as teachers, nurses, or administrators of social benefits and services. Correspondingly, mothers' employment rates (and overall female employment rates) hover around a high 80 % in Sweden, Denmark, and Finland, thus exceeding the OECD average of 66 % of maternal employment (Bradshaw & Finch, 2010).

By contrast, welfare states in the Continental European countries fare less well in promoting opportunities for women. Until very recently, care work for children in these countries has been understood primarily as private responsibility, and family policies have long been centered around a male breadwinner model, thus providing little support—for example, in terms of public childcare—for mothers' employment (Orloff, 2010, p. 258). Furthermore, in liberal welfare states childcare services are often provided via the market, which may promote employment opportunities for professional, upper-class women but not working-class women (Moller et al., 2013, p. 140).

In sum, when looking at the outcomes of different welfare regimes from a perspective of social justice, the social-democratic welfare regime stands out with regard to meeting citizens' basic needs, promoting greater equality of outcome, equalizing opportunities, and realizing meritocratic conditions (e.g., educational achievement independent of socioeconomic status). By contrast, the other regime types are more heterogeneous on these dimensions. While conservative welfare regimes are rather successful in preventing poverty and to some extent in

mitigating socioeconomic disparities, this is not the case for liberal and Mediterranean welfare regimes, where poverty rates and income inequality are comparatively high. And with respect to equalizing opportunities concerning the educational attainment of lower class children or the labor market prospects of women, liberal, conservative, and Mediterranean welfare states on average also fall behind social-democratic welfare regimes.

16.4.2   Meeting Needs: Poverty and the Welfare State

In order to assess how different welfare regimes provide for their citizen's most basic needs, I look at the extent of relative income poverty across countries. While other conceptions regarding human needs, such as Sen's notion of capabilities (Sen, 1992), might be theoretically more sophisticated, the advantage of looking at *relative income poverty* is that it is relatively easy to measure empirically and that comparable data on its extent exist. Furthermore, the issue of poverty is fundamental for any evaluation of welfare state politics because, as Ringen has argued, "[i]f poverty prevails, the welfare state is a failure" (Ringen, 2006, p. 141).

In an influential comparative study, Goodin et al. (1999) found that in social-democratic welfare states the overall incidence of poverty is lower, poverty is less severe, and the duration of poverty spells is shorter than in conservative or liberal regimes. Correspondingly, Table 16.2 shows high poverty rates in liberal welfare states, where the share of the population with less than 50 % of the median income ranges between 7 (Canada) and 15 % (United States), while the respective figures for social-democratic and conservative regimes are considerably lower, lying between 5 (Sweden, Denmark) and 7 % (Belgium, France) (see Table 16.1, cf. also Saunders, 2010, p. 522).

Furthermore, research on the dynamics of poverty shows that levels of persistent (i.e., long-term) and recurrent poverty are also lowest in social-democratic welfare regimes and highest in liberal and Mediterranean countries, with the

conservative countries taking an intermediate position (Fouarge & Layte, 2005, p. 423).

These findings indicate that welfare state institutions impact the level and duration of poverty across nations. Indeed, studies comparing poverty rates before and after taxes and transfers find that social policy exerts a genuine and substantial influence on poverty reduction which operates independent from economic, structural, and demographic variables (Brady, 2006; Moller, Huber, Stephens, & Bradley, 2003). In general, countries with more generous welfare states typically tend to have low posttax/transfer poverty rates (Kenworthy, 1999; Moller et al., 2003). Furthermore, it is not only the size but also the shape of government intervention—that is, the kinds of policies—which matters. Moller et al. (2003, p. 43), for instance, find that child and family allowances are particularly relevant in reducing posttax/transfer poverty rates while means-tested benefits are not statistically significant. Along similar lines, Nelson (2004) shows that in cross-national perspective, non-means-tested entitlements (e.g., from social insurance) are more effective in reducing poverty than means-tested benefits.[9] This is in line with what Korpi and Palme (1998) term the "paradox of redistribution," which posits that poverty reduction is greatest where a majority of the population benefits from—and contributes economically to—the welfare state.

Thus, these findings suggest that welfare states relying primarily on means-tested benefits, such as the liberal Anglo-Saxon ones, fare particularly bad in reducing poverty, and by implication in meeting the basic needs of the least well-off. By contrast, the more generous social-democratic and conservative welfare regimes in Scandinavia and Continental Europe realize such a needs-based conception of justice to a greater degree.

Table 16.2 Poverty in different welfare regimes

	Poverty rates (among working-age people, mid-2000s)
Social democratic welfare states	
Sweden	5
Norway	7
Denmark	5
Finland	7
Mean	6
Conservative welfare states	
Netherlands	7
Germany	8
France	7
Belgium	7
Italy	10
Mean	7.8
Liberal welfare states	
Australia	10
Canada	10
UK	7
US	15
Mean	10.5

Source: OECD (2008, p. 135) (http://dx.doi.org/10.1787/422446454016)
Note: Poverty thresholds are set at 50 % of the median income of the entire population

16.4.3 Maintaining Achievements: Merit, Stability, and the Welfare State

Asking in how far welfare state policies contribute to the realization of "meritocratic" principles may seem surprising. After all, a prominent critique holds that the welfare state would crowd out individuals' work effort and ambition, thus undermining the recognition of individual merit. Yet, as Sect. 16.4.1 has shown, social policies may contribute quite a bit to the realization of (greater) equality of opportunity, and thus bring about one of the necessary conditions for meritocracy. Furthermore, as argued previously (cf. Sects. 16.2 and 16.3.3), one can interpret the equivalence between contributions and benefits established by social insurance programs as one possible way in which "merit" becomes a relevant normative element of welfare state

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[9] In fact, recent analyses show that only in a minority of European countries the level of social assistance benefits—probably the most important means-tested minimum income protection scheme—reaches the poverty thresholds of 50 % of the median income, and none the 60 % threshold (Nelson, 2013, pp. 391–392).

policies, as status-maintaining benefits mirror a person's success in the labor market.[10] In this regard, the related empirical question is in how far different welfare regimes allow individuals and their families to maintain their standard of living in the face of crucial life course events, such as unemployment or retirement.

Comparing different varieties of unemployment protection regimes across nations, Gallie and Paugam (2000, pp. 3–6) note that only the universalistic and employment-centered unemployment protection systems in social-democratic and conservative welfare states, respectively, provide encompassing coverage and an extended duration of relatively generous benefits, whereas liberal welfare states pursue a minimalist approach with incomplete coverage and rather meager, means-tested benefits of short duration. Hence, one could assume that citizens' standard of living during phases of unemployment is subject to greater fluctuation in liberal as opposed to conservative or social-democratic welfare regimes. Indeed, analyses of the "scar effects" of unemployment—that is, lower pay in a new job or inadequate reemployment—show less severe earnings losses and more favorable post-unemployment career trajectories in social-democratic and conservative than in liberal welfare states (Gangl, 2006).

Furthermore, empirical assessments of income instability—as indicated, for instance, by the year-to-year variation of a household's income—conclude that social policies in social-democratic and conservative welfare state contribute substantially to the stabilization of income flows across an individual's life cycle, while this is less so in liberal welfare states (Gangl, 2005; Goodin et al., 1999; Western, Bloome, Sosnaud, & Tach, 2012). For instance, Goodin et al. (1999, pp. 202–204) analyze the effect of welfare state interventions, that is, taxes and transfers, on household income stability in Germany, the

Netherlands,[11] and the US by looking at median coefficients of variation of pre- and postgovernment income over a 10-year period. Focusing on people living in households with heads under age 60, they find that in all countries welfare state intervention contributes substantially to the stabilization of income flows. As shown in Table 16.3, pregovernmentincomes are more unstable than postgovernment incomes. Yet, the stabilizing effect of the welfare state is strongest in Germany and the Netherlands and weakest in the US. In fact, "[p]ost-government income instability for Americans in general is more than a quarter greater than it is for the Germans or the Dutch in general" (Goodin et al., 1999, p. 203). Looking at min–max ratios—that is, the percentage difference between the best and worst year of income—shows that in Germany and the Netherlands, the median person's postgovernment income in his or her worst year still amounted to 54 % of the best year, while in the US a median person's postgovernment income in his or her worst year was only 44 % of his or her best year.

Finally, while the above findings look at overall income stability across people's working life, another important issue, especially for social insurance systems aimed at status maintenance, is to what extent government transfers effectively replace individuals' previous wage income. Analyzing "effective replacement rates" of public pension transfers, Goodin et al. (1999, p. 209) find—rather surprisingly—that public pension transfers in the Netherlands and the United States replace a larger portion of an individual's market income than in Germany, where the conservative regime logic would lead us to expect higher replacement rates.

In sum, while the stability of citizens' standard of living over their life course is consistently smallest in the liberal welfare regime, it is considerably higher in the social-democratic and conservative welfare regimes; yet, in the latter it

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[10] However, such a rather "formalist" interpretation of merit along the lines of equivalence is not uncontestable as it makes no assumptions about the specific form which a contribution would take that "merits" a reward.

[11] Contrary to many other studies, Goodin et al. (1999) classify the Netherlands as a social-democratic welfare regime.

is not as high as one might expect according to its dominant social-insurance logic.

16.5   Welfare State Attitudes and Social Justice

Whereas the previous section aimed to assess the outcomes of different welfare regimes with a view to three principles of equality, need, and merit, this section asks how *citizens themselves* view the welfare state. This is an important issue because welfare state institutions can only be sustained if they are met with public approval, especially in times of ongoing reforms and retrenchment (Esping-Andersen, Gallie, Hemerijck, & Myles, 2002, p. 8). As there is a large literature on attitudes toward the welfare state on which recent overviews exist (e.g., Svallfors, 2010), I focus on those studies that more or less explicitly take into account citizens' views and conceptions of social justice. In surveying this literature, I follow two sets of questions: First, which principles of social justice receive most support, how does this differ between social groups, and how do justice orientations affect citizens' support for the welfare state? Second, does popular support for different principles of social justice vary across nations,

Table 16.3 Income instability in Germany, the Netherlands, and the United States

	Germany	Netherlands	US
Pregovernment			
Coefficient of variation, mid-1980s to mid-1990s	0.33	0.28	0.37
Min–max (%), mid-1980s to mid-1990s	42.0	41.3	39.3
Postgovernment			
Coefficient of variation, mid-1980s to mid-1990s	0.20	0.20	0.26
Min–max (%), mid-1980s to mid-1990s	53.5	53.3	44.0

Source: Goodin et al. (1999, Table A5, Stab 3A, p. 301)

and is this related to institutional differences between welfare regimes?

With regard to the first issue, survey research shows that on the aggregate level, merit receives the most popular support, followed by need, while equality (of outcomes) receives the least support (Aalberg, 2003; Liebig & Schupp, 2008; Marshall, Swift, Routh, & Burgoyne, 1999; Miller, 1992). Along these lines, qualitative studies find a general normative consensus among rich and poor that awards wide legitimacy to the principle of merit within the economic domain, while other principles like need or equality are considered appropriate in domestic or political contexts (Hochschild, 1981; Lane, 1986; Sachweh, 2012).[12] However, social groups still differ in the degree to which they endorse these principles. While support for merit is greater among members of privileged groups (i.e., higher social classes, men, highly educated persons), members of disadvantaged groups (i.e., lower classes, women, low-skilled) endorse egalitarian principles such as need and equality to a greater degree (Lewin-Epstein, Kaplan, & Levanon, 2003; Liebig & Schupp, 2008; Swift, Marshall, Burgoyne, & Routh, 1995).

How do justice beliefs affect citizens' support for the welfare state? In general, popular support for the welfare state is driven by two factors: self-interest—as indicated by social class, gender, and so on—and an individual's normative orientation, such as justice beliefs or humanitarian values (Mau, 2003; Svallfors, 2010). As has been argued in Sect. 16.3, welfare state institutions incorporate specific normative orientations and represent conceptions of a just social order. Thus, a correspondence between these institutionalized normative ideals on the one hand side and citizens' normative orientations on the other can be expected to enhance welfare state support. In particular with regard to policies that redistribute resources across social groups (rather than between life

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[12] Similarly, social psychological research shows that merit is deemed appropriate for the distribution of status or money, while noneconomic goods should be distributed according to the principles of equality or need (Deutsch, 1975, p. 145; Törnblom & Foa, 1983, p. 165).

phases), norms and values have been found to be important. Roller, for example, argues that "that support for socio-economic equality policies is predominantly value-based" (Roller, 1995, p. 192). Along these lines, Lewin-Epstein et al. (2003) show that support for redistribution is stronger among individuals holding equality and need as justice orientations, and Sachweh et al. (2007) show that the acceptance of social assistance (or minimum income) schemes is greater among respondents supporting the principle of need. Yet, it is not only egalitarian justice orientations that matter. According to the institutionalist reasoning lined out above, the crucial issue is the *correspondence* between the values institutionalized in certain programs and citizens' justice beliefs. In that sense, Ullrich (2008, pp. 198–201) finds that support for the German pension insurance—which grants benefits in accordance with one's contributions—is greater among respondents with meritocratic justice orientations, and lower among respondents with egalitarian or needs-based justice orientations. All in all, these findings underline the importance of paying attention to the justice principles encapsulated in specific social policies, rather than assuming a linear relationship between egalitarian orientations and welfare state support.

The institutional design of welfare states and the corresponding justice principles vary across nations. Therefore, we also would expect citizens' justice beliefs to vary cross-nationally. However, the literature has not yet reached definite conclusions on this issue. On the one hand side, citizens' general normative orientations toward the welfare state, solidarity, and equality appear to vary systematically across regimes. For instance, comparing perceived and desired (in)equality in Sweden, the US and Germany, Sachweh and Olafsdottir (2012) find that while US respondents regard their country as highly unequal, their aspirations for a more egalitarian society are smaller than those of Swedes or Germany (Sachweh & Olafsdottir, 2012, p. 160). Similarly, Svallfors finds that the degree of income differences citizens consider as legitimate is smallest in Sweden and Norway and greatest in the US (Svallfors, 1997, pp. 289–290). Not surprisingly, support for welfare state inter-

vention, redistribution, and a strong notion of solidarity are also strongest in social-democratic countries, followed by the conservative ones, and weakest in liberal welfare states (e.g., Arts & Gelissen, 2001; Mehrtens, 2004; Svallfors, 1997, 2003). Thus, there seems to be little doubt that, overall, the normative orientations of Scandinavians stand out as remarkably egalitarian, and that citizens in other European countries are also fairly supportive of government intervention in principle. By contrast, this is not the case in liberal nations.

On the other hand side, matters are less straightforward with regard to cross-national differences in citizens' support for different *justice principles*. In an early review of experimental studies on the choice of distribution principles in different countries, Törnblom and Foa (1983, p. 166) report a strong preference for equality among Swedish subjects for the distribution of a variety of goods and resources, while participants from the US chose the principle of merit for economic (money) and the principle of equality for noneconomic resources (love, services). Subjects from Germany, finally, found the principle of merit most appropriate for the allocation of status, while non-economic resources should be distributed according to the principle of need. However, when looking at preferences for distributive principles across countries with more recent survey data, the picture is mixed. Using a variety of different surveys, Aalberg (2003) finds that while the principle of merit receives high levels of support across countries, there are no clear-cut cross-national differences with regard to the principles of need or equality. Likewise, Arts and Gelissen (2001) report that citizens in social-democratic welfare states are significantly less in favor of all three core justice principles when compared to citizens in liberal welfare regimes, while citizens in conservative nations less likely to support equity (Arts & Gelissen, 2001, pp. 294–295). Given these contradictory and counterintuitive findings, Reeskens and van Oorschot (2013, p. 1175) conclude that insights on the cross-national variation of principles of distributive justice are "scarce, fragmented and inconclusive." They suggest not to look at preferences for distributive justice in an abstract sense

but to focus on how these principles are applied to different social risks. Looking at European citizens' preferences for merit, need, and equality with regard to pensions and unemployment benefits, they find that in the case of unemployment a majority of countries respondents prefers equality over merit, whereas opinions are split in the case of pensions, with about half of the countries showing a higher preference for equality or merit, respectively (Reeskens & van Oorschot, 2013, p. 1182). With regard to the relation between institutional differences and popular support for distributive justice principles, they find that rather than to welfare regime types preferences for justice principles are related to the design of specific policies: While citizens in countries with a flat rate or universal pension system prefer equality for distributing old-age incomes, respondents in nations with earnings-related pension systems support equity to a greater extent (Reeskens & van Oorschot, 2013, p. 1189). These findings suggest that it might be more fruitful to investigate the interrelation between the institutional characteristics of specific policies and people's support for the conceptions of justice they embody. This, however, requires that the conceptions of social justice institutionalized in *specific policies* have to be reconstructed first.

16.6   Changing Notions of Social Justice and Welfare State Futures

This chapter has looked at the relation between social justice and the welfare state on the institutional, social-structural, and attitudinal level. It has demonstrated that considerable differences between welfare state regimes exist (a) regarding the principles of social justice they emphasize, (b) in how far their outcomes correspond to core principles of distributive justice, and (c) with respect public opinion on social justice. *Equality* appears to be a central normative ideal institutionalized in social-democratic welfare states prevalent in Scandinavia, and while they have the lowest levels of poverty and income inequality, their citizens' orientations come out as very egal-

itarian. *Need*, by contrast, seems to be at the ideational core of the liberal welfare state model of the Anglo-Saxon nations. Yet, liberal welfare states are marked by high levels of poverty and income inequality and a distinct attitudinal profile of their citizens in which, by and large, support for welfare state politics is smaller than in other nations. *Merit*, finally, is a central idea underlying the social insurance schemes typical of conservative welfare regimes in Continental Europe. Poverty and income inequality in these nations are lower than in liberal welfare regimes but higher than in social-democratic ones, and while Citizens' normative orientations are closer to those of Scandinavian citizens', they are not as egalitarian.

Although this alignment of the three core notions of distributive justice with Esping-Andersen's classification of welfare regimes appears straightforward, in practice social-democratic, liberal, and conservative welfare states also encapsulate other justice principles in specific policies and are therefore marked by a mixture of norms. Until now, however, few studies exist which attempt to empirically reconstruct the ideational foundations of a variety of different policies in a greater number of countries. In that sense, more comparative-historical research is needed that empirically reconstructs the ideational foundations of different welfare state institutions (cf. Kildal & Kuhnle, 2005; Steensland, 2008).

Furthermore, the Southern European countries are not easily classified with regard to their normative foundations, and the newly emerging welfare models in Eastern Europe, Latin America, or East Asia may further complicate the picture. A further important task for future research on social justice in welfare state contexts is therefore to investigate in greater depth justice conceptions in non-Western contexts and to compare them to established notions of social justice prevalent in the Western world (e.g., Rieger & Leibfried, 2003).

Finally, recent decades have seen an ongoing restructuring of welfare states across the industrialized Western nations. While the kind and scope of specific reforms differs cross-nationally, the

broad and common trend can be characterized as a shift from universal social rights designed to protect and decommodify labor toward an increased selectivity and targeting of benefits and services, which are often delivered by private actors and whose aim it is to increase individual responsibility and to "activate" those not in the labor force (Gilbert, 2002, p. 4). Welfare state reform can thus be characterized as a dual process in which the retrenchment of publicly provided benefits and the curtailment of social rights (Korpi, 2003) has been accompanied by the strengthening of private provision (often stimulated publicly, for example, via tax incentives) and individual responsibility (Gilbert, 2002; Hacker, 2004). Importantly, this not only involves the reconfiguration of institutional arrangements but also a shift within the *normative vocabulary* and conceptions of social justice underlying welfare states. With regard to the US, Hacker (2006, p. 34) identifies an "ideological transformation away from an all-in-the-same-boat philosophy of shared risk toward a go-it-alone vision of personal responsibility" which appears also to have gained ground in Europe. Moreover, public social policies are increasingly being framed as "social investment" (Morel et al., 2012), that is, they should not merely compensate disadvantages once they have occurred but help to prevent certain risks before they arise, thereby also yielding collective payoffs in the long run (e.g., higher employment rates). Hence, the question arises whether alongside this institutional transformation citizens' attitudes toward social justice have changed as well.

Due to the lack of longitudinal and comparative survey data on public opinion toward welfare state reform, no easy and definite answer to this question can be given. While it would be highly desirable—and indeed an important task for future research—to monitor citizens' evaluation of welfare state reforms in different European countries over time, the existing studies mostly focus on single countries at one point in time. Nevertheless, some tentative conclusions shall be drawn here. What the available evidence indicates is that in Europe, people neither fundamentally oppose nor unequivocally embrace the

transformations of the welfare state which have taken place (e.g., Achterberg, van der Veen, & Raven, 2014; Burkhardt, Martin, Mau, & Taylor-Gooby, 2011; Edlund & Johansson Sevä, 2013; Mau & Sachweh, 2013; May & Schwanholz, 2013; Sachweh, Burkhardt, & Mau, 2009). Indeed, attitudes toward welfare state reform are seldom unidirectional and often ambivalent. For instance, with regard to the general role of individual responsibility, quantitative and qualitative data from Germany show that citizens principally agree to take over more individual responsibility, particularly in the fields of pensions and unemployment (Mau & Sachweh, 2013, p. 14; Sachweh et al., 2009, p. 614). At the same time, however, sizeable portions of respondents report not being able to put money aside for retirement—with the more vulnerable groups (women, young people, lower classes) disproportionately represented (Sachweh et al., 2009, pp. 613–615)—and demand that the state should assist individuals in vulnerable positions in acting out their individual responsibility (Mau & Sachweh, 2013, pp. 11–12). Therefore, while generally supportive of some supplementary private provision, German citizens seem to be well aware of the potential social costs a privatization of welfare might incur and therefore reject a complete retreat of the state. Along this lines, Edlund and Johansson Sevä (2013) have shown that support for the traditional Swedish welfare model is particularly high in regions where the privatization of welfare services is low.

Furthermore, welfare reforms are debated among the public not only because of their material implications but also because of their symbolic dimensions. Using survey data from the Netherlands, Achterberg et al. (2014) show that while members of the lower classes oppose reforms with negative (re)distributive consequences, they support particular aspects of activation policies, such as work requirements—which, according to a logic of reciprocity, can be interpreted as doing something in return—even though they are at a greater risk of being affected by such measures themselves one day. Another example are the heated debates over the reform of unemployment provision in Germany in 2005,

which merged provision for the long-term unemployed and social assistance into a single scheme ("Hartz IV"). Contestation revolved not only around the material consequences of the reform but was also sparked off by a break with long-standing notions of justice institutionalized in German unemployment protection (Mau & Sachweh, 2013; May & Schwanholz, 2013), evoking large-scale public protest also among members of the middle class (Rucht & Yang, 2004).

Therefore, as Esping-Andersen et al. (2002, p. 8) notes, "[w]e must be certain that any design for a new social contract conforms to prevailing normative definitions of justice." This does not mean that welfare states and their normative foundations should be static and not subject to change. It does imply, however, "specifying the bases of rights and reciprocity, and delineating the claims that citizens can justly make on society" (Esping-Andersen et al., 2002, p. 8). Arguably, then, any successful and sustainable welfare state reform in the future will depend on whether persuasive and plausible reinterpretations of social justice can be found which resonate with citizens' normative sentiments while also providing convincing blueprints for institutional redesign.

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Justice in the Work Setting

17

Marius van Dijke and David De Cremer

This chapter provides an overview of the role of justice in work settings and why its effects can be so profound. Within organizations, people experience different types of justice, which have been operationalized as the dimensions of distributive, procedural, interactional, and informational justice (see Colquitt, 2001). The work setting provides an excellent context to study and apply justice principles and theories. For instance, organizations are a useful setting to test instrumental and identity-based justice models because they provide people with important tangible and identity-related outcomes (Blader & Tyler, 2009). Moreover, interactions with work organizations can induce high levels of subjective uncertainty, particularly when employees enter or leave the organization. Uncertainty-based justice models (Lind, 2001; van den Bos & Lind, 2002) have thus been successful in explaining employee attitudes and behavior at these stages.

Over the last 50 years, a vast literature has evolved on the role of justice in work organizations (see Cohen-Charash & Spector, 2001; Colquitt, Conlon, Wesson, Porter, & Ng, 2001; Colquitt et al., 2013, for meta-analyses; see Greenberg & Colquitt, 2005, for an overview). We do not offer a comprehensive overview of this literature. Instead, we assume a thematic approach that highlights the unique relevance of the work setting to the study and application of justice processes. We first address the role of justice in the process of personnel selection (Theme I). We then examine how justice can motivate employees to contribute to the organization's welfare, and how justice influences in-role and extra-role performance (Theme II). Subsequently, we discuss the role of justice in interactions between employees and their supervisors, pay particular attention to the integration of justice models and theories on organizational leadership, and address factors that explain the enactment of justice (Theme III). These are relatively new research areas that have not been extensively reviewed elsewhere. Finally, we address the role of justice when employees leave the organization, either voluntarily or involuntarily (Theme IV).

17.1 Theme I: The Role of Justice in Personnel Selection

17.1.1 Applicant Reactions

Traditionally, personnel selection researchers have focused on developing instruments for selecting job candidates. A vast amount of

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research has been devoted to establishing and improving the validity of various selection instruments such as ability and personality tests, job simulations, and interviews (Anderson & Herriot, 1997). More recently, researchers have become interested in the effects of selection instruments and other aspects of the hiring procedure on applicant reactions, that is, on "attitudes, affect, or cognitions an individual might have about the hiring process" (Ryan & Ployhart, 2000, p. 566). This interest stems from the realization that a large pool of qualified and interested applicants is required to select the best possible candidates. To attract a pool of such applicants, organizations need to realize that an applicant's decision to apply for a job with a company is partly based on perceptions of the company's hiring and selection practices (Turban, 2001).

The applicant reactions model of Hausknecht, Day, and Thomas (2004) is probably the most influential model that deals with attracting qualified applicants. Building on the foundational work of Gilliland (1993), this model emphasizes characteristics of the hiring process that shape applicant reactions. Many of these characteristics refer to justice in personnel selection practices. Specifically, the model includes procedural justice rules such as whether a selection instrument is related to the job, whether the test situation allows applicants to show their performance, whether applicants have the opportunity for decisions to be reconsidered, and whether the organization consistently treats all applicants in the same manner. The model also includes informational justice rules such as whether applicants receive feedback about their performance and whether organizations are open about their selection procedures. Interactional justice is also integral to the model in considering the quality of treatment of the applicant and propriety of questions. These process and interaction characteristics are thought to influence perceptions of the fairness of a selection process and, subsequently, other outcomes that reflect the orientation of applicants to the organization. The model of applicant reactions also recognizes distributive justice as a relevant antecedent of applicant reac-

tions. However, relatively few empirical studies have addressed the role of distributive justice. This may be because researchers have focused mostly on the selection stage of the hiring process when distributive justice information is usually not available to applicants (Gilliland & Hale, 2005).

In support of the applicant reactions model, research shows that various justice rules that characterize the selection process influence outcome variables such as the attractiveness of the organization to applicants, applicants' intentions to recommend the organization to peers, intentions to accept a job offer from the organization, and litigation intentions (Truxillo, Steiner, & Gilliland, 2004). However, the evidence that justice rules also influence actual behavior is weaker. For instance, some studies support the relationship between justice rules and applicant withdrawal (e.g., Schmit & Ryan, 1997) but others do not (e.g., Truxillo, Bauer, Campion, & Paronto, 2002). Furthermore, research has also been inconsistent in showing that during the selection stage justice influences work attitudes and performance among applicants that receive and accept a job offer. For instance, some research shows that adherence to justice rules stimulates later organizational commitment and/or job satisfaction among those applicants who accept a job offer (e.g., Ambrose & Cropanzano, 2003), whereas other research has not found these effects (Cunningham-Snell, Anderson, & Fletcher, 1999). No consistent relationship has been found between procedural justice rules and later job performance (Gilliland, 1994) or turnover among those applicants who are hired (Truxillo et al., 2002). In sum, considering justice as part of the selection process is relevant, but given that influence on actual behavior and long-term effects are not easily detected, it is still not completely clear how important justice really is in this stage of becoming an organizational member (see Gilliland & Hale, 2005, for a more detailed overview of relevant evidence).

Although adherence to justice rules seems straightforward and advantageous to the organization, the reality of the selection context can

result in these rules being violated. Folger and Cropanzano (1998) have called this a "justice paradox." This notion refers to the fact that selection procedures with high predictive validity often do not satisfy justice concerns. For instance, research shows that applicants perceive structured interviews to be less fair than unstructured interviews. This is likely because applicants feel that their input in a structured interview is limited whereas an unstructured interview allows them to demonstrate their abilities. Yet, the predictive validity of structured interviews is much higher than that of unstructured interviews (Huffcutt & Arthur, 1994). Similar trade-offs have been found between validity and fairness perceptions for cognitive ability and personality tests (Cropanzano, Bowen, & Gilliland, 2007). One way to deal with this paradox is to combine selection instruments that have high predictive validity with instruments that are high in perceived justice. For instance, structured and unstructured interviews could be used to combine predictive validity and give applicants the chance to demonstrate their abilities and influence the application conversation (Gilliland & Hale, 2005).

Many justice effects in the context of the hiring process can be explained in terms of fairness heuristic theory (Lind, 2001) and the related uncertainty reduction model (van den Bos & Lind, 2002; see e.g., Truxillo et al., 2004), for a discussion of this model in the context of personnel selection (see also Van den Bos & Bal, this Handbook). Fairness heuristic theory stresses the role of justice for people as a heuristic indicator of whether they can trust powerful authorities not to exploit them. When authorities act fairly, it suggests they are not exploitative. However, authorities who act unfairly send a clear signal that they cannot be trusted. During the selection procedure, applicants have little power (i.e., because the organization selects the preferred candidate) and they are in a situation of great uncertainty (i.e., they operate in a situation in which they have little knowledge of their interaction partners). They are thus likely to be particularly attentive and sensitive to fairness-relevant information (Bauer et al., 2001; Gilliland, 1993).

17.1.2 Justice Expectations

During the early stages of their interaction with the selecting organization, applicants often have little knowledge of the levels of the various types of justice of the organization. Therefore, although the bulk of research on justice in a personnel selection context focuses on justice perceptions, some studies have started to focus on applicants' *expectations* of justice (Bell, Wiechmann, & Ryan, 2006). Bell et al. argue that justice expectations can influence behavior directly but also indirectly by shaping justice perceptions. This may occur through confirmatory information processing, which holds that people to some extent perceive what they expect and thus behave accordingly, thereby confirming their initial expectations (Miller & Turnbull, 1986). Bell et al. (2006) present initial support that fairness expectations influence applicant reactions such as intentions to recommend the hiring organization to peers directly and also by shaping justice perceptions.

Research has also started to identify factors that shape justice expectations. For instance, Geenen et al. (2012) show that expectations of procedural and distributive justice are predicted by the belief in a just world and also by the belief in tests (i.e., the belief that tests are valid instruments for selection purposes). Yet, the influence of these two types of beliefs in predicting justice expectations is moderated by direct experiences with the selection context. The authors find that the belief in a just world—a relatively abstract type of belief—is a particularly strong predictor of justice expectations among applicants with little experience in the selection context. In contrast, belief in tests—a more specific and concrete belief—is a stronger predictor of justice expectations among people with extensive direct experiences in the selection context.

17.1.3 Concluding Remarks

Various forms of justice play an important role in the selection process by shaping the ability of

organizations to attract applicants. Some research even highlights the possibility that justice experienced during the application process may influence the attitudes and behavior of successful applicants when they actually become members of the organization. Importantly, applicants who are not selected might negatively affect the organization's well-being and performance, for instance, by litigation against the organization. Organizational managers thus may want to carefully consider how they design the selection process because it is the first contact most employees and also nonemployees have with the organization.

Our first section explored the relevance of justice during the stage in which people enter or attempt to enter the organization. In the following section, we discuss how justice facilitates organization members' motivation to contribute to the interest of the organization.

17.2 Theme II: Justice and Employee Motivation

17.2.1 Effects of Justice on Attitudes and Performance

A large number of studies provide support for the prediction that justice positively influences employee attitudes such as satisfaction with their outcomes and the job in general, and their degree of organizational commitment. Justice also influences employee perceptions by stimulating trust in the organization and the legitimacy of its management, and has positive effects on behavioral outcomes on both in-role and extra-role performance (i.e., referred to as organizational citizenship behaviors or OCB; see Cohen-Charash & Spector, 2001; Colquitt et al., 2001, 2013; Fassina, Jones, & Uggerslev, 2008; for meta-analyses; see Conlon, Meyer, & Nowalowski, 2005, for a more detailed treatment of the role of justice in stimulating in-role performance). OCB refers to behaviors as diverse as voluntarily helping other organization members, defending the organization

when it is criticized, and speaking up to improve the way in which work is organized. As in-role performance, employee OCB is also positively associated with organizational performance (Podsakoff, Whiting, Podsakoff, & Blume, 2009).

High levels of justice are also associated with lower levels of "antisocial employee behaviors." Antisocial behaviors refers to behaviors as varied as discriminating against fellow employees based on gender or race, discussing confidential company information with unauthorized others, theft of company property, retribution (Mclean Parks, 1997), revenge, sabotage, and retaliation (see Cohen-Charash & Spector, 2001; Colquitt et al., 2001, 2013, for meta-analyses).

There are, however, differences in the strengths of the effects of each of the four justice dimensions. Both distributive and procedural justice strongly affect employee attitudes and moderately affect OCB directed at the organization and antisocial responses. Both types of justice have weak effects on interpersonally oriented OCB. Yet, whereas distributive justice only weakly influences in-role job performance, procedural justice clearly has a stronger effect on this outcome variable. The effects of interpersonal and informational justice on attitudes and behaviors are often somewhat weaker than those of procedural and distributive justice, and particularly the effects on in-role performance are weak. On the other hand, the effects on interpersonally oriented OCB are clearly stronger than those of distributive and procedural justice (see Cohen-Charash & Spector, 2001; Colquitt et al., 2001, for details).

17.2.2 Explaining the Effect of Justice on Performance

Research offers three types of explanations for the effects of justice on in-role and extra-role performance. The first is labeled the social exchange explanation (see Cropanzano, Byrne, Bobocel, & Rupp, 2001; Moorman & Byrne,

2005, for overviews). A social exchange relationship involves the belief among employees that the organization and/or their supervisor values their contributions and cares for their well-being. This, in turn, instills an obligation to reciprocate by displaying behaviors that support the organization and the supervisor. Because employees value justice highly, they reciprocate the social rewards that accompany their perceptions of justice with improved in-role and extra-role performance. In support of this argument, research shows that indicators of social exchange such as psychological contracts, perceived organizational support, leader–member exchange, and trust mediate justice effects on in-role and extra-role performance (e.g., van Dijke, De Cremer, & Mayer, 2010; see Moorman & Byrne, 2005, for an overview of mediating variables).

The social exchange explanation for the effects of justice on various types of employee performance suggests that it is relevant to distinguish specific sources of justice (e.g., one's supervisor or the organization) and perhaps also specific types of justice to the extent that specific types of justice often emerge from specific sources (e.g., procedural justice versus interpersonal justice). Making these distinctions may be relevant because social exchange suggests a targeted response to specifically benefit the source of justice. The above noted relatively strong relationship of procedural and distributive justice with organizationally oriented OCB may thus result because these types of justice are viewed as emanating from the organization; similarly, the relatively strong relationship of interpersonal and informational justice with interpersonally oriented OCB may result because these types of justice are viewed as emanating from a specific source (i.e., the supervisor; Loi, Yang, & Diefendorff, 2009). Yet, the empirical evidence for such targeted justice effects seems to be mixed at best (compare, for instance, the results of meta-analyses by Fassina et al., 2008 with those of Colquitt et al., 2013).

A second type of explanation for the effects of justice on employee behavior that supports the well-being of the organization is based on identity processes (see De Cremer & Tyler, 2005; Tyler & Blader, 2003, for overviews).

Identity-based justice models note that justice signals that employees are considered respected members of the social collective, and that the organization is a collective that they can be proud of. This increases a sense of belongingness and identification with the collective, which motivates employees to contribute to the collective welfare (Blader & Tyler, 2009). In support of these models, identity-related variables such as respect, pride in the organization, and organizational identification explain procedural justice effects on employee behaviors that are aimed at supporting the organization (e.g., OCB; Blader & Tyler, 2009; van Dijke, De Cremer, Mayer, & van Quaquebeke, 2012).

The third type of explanation is related to affective processes. Weiss, Suckow, and Cropanzano (1999) conducted one of the first studies showing the relevance of affective variables to understand justice effects. Their findings show that procedural justice can influence happiness, guilt, and pride. A number of subsequent studies have shown that positive and negative emotions mediate the relation between justice and various outcomes such as the avoidance of antisocial behaviors, the emergence of antisocial behaviors like revenge, and cooperative behaviors aimed at supporting the collective and its authorities (see Colquitt et al., 2013, for a meta-analysis).

17.2.3 Justice and Other Types of Performance

Research has also started to address the relevance of justice to concepts that fall under the umbrella term of "constructive deviance," that is, "behaviors that depart from the norms of the reference group such that they benefit the reference group and conform to hypernorms" (Vadera, Pratt, & Mishra, 2013, p. 1221). Research within the social exchange tradition suggests that justice may also promote employee creativity. One typical definition of creativity is "ideas, processes, and solutions that are viewed as both original and appropriate or useful" (Khazanchi & Masterson, 2011, p. 86). Generating original and novel ideas

involves being vulnerable by challenging existing knowledge or the status quo. This suggests that employees must be willing to accept such vulnerability in order to be creative. Because justice breeds trust (i.e., "a psychological state comprising the intention to accept vulnerability based upon positive expectations of the intentions or behavior of another," Rousseau, Sitkin, Burt, & Camerer, 1998, p. 394), it can create a context in which employees feel encouraged to take initiative and accept the vulnerability associated with creativity. In support of this argument, Khazanchi and Masterson (2011) show that supervisor's interactional and informational justice are both associated with enhanced employee creativity, and this relationship is mediated by trust in the supervisor.

Research also shows that procedural justice stimulates employees to engage in "pro-social rule breaking" which can be defined as "intentional violation of a formal organizational policy, regulation, or prohibition with the primary intention of promoting the welfare of the organization or one of its stakeholders" (Morrison, 2006, pp. 7–8). Such behaviors include circumventing the chain of command to get additional employees allocated to a project that benefits the organization and allowing an employee to work flexible hours even if the rules explicitly forbid this. In an experiment and an organizational field study, Langendijk, van Dijke, and De Cremer (2014) show that procedural justice stimulates pro-social rule breaking among employees. This effect is mediated by employee perceptions of being respected as organization members, but not by the pride they experience in the organization. Findings like these provide an interesting challenge for the explanatory scope of models that focus on justice as stimulating the legitimacy of authorities and institutions and subsequent compliance with the norms of the collective.

Social exchange, identity, and affect-based explanations for the role of justice in stimulating various types of performance have received the bulk of research attention. However, employees with high commitment to the organization and high job satisfaction may experience higher intrinsic motivation. Based on this argument

Zapata-Phelan, Colquitt, Scott, and Livingston (2008) argue that justice may also facilitate performance by increasing intrinsic motivation, and in a laboratory experiment and a field study they show that procedural justice (but not interpersonal justice) stimulates task performance, partly because it promotes intrinsic motivation.

17.2.4 Justice Facilitating the Effects of Punishment and Reward Systems

So far, we have focused on the isolated role of justice in motivating employee performance. However, organizations typically have a number of systems in place that are intended to motivate employees to display desired behavior (e.g., high level performance) and refrain from unwanted behavior (e.g., antisocial behavior). There is clear evidence that justice facilitates the effectiveness of such systems. One example is the use of punishment systems to respond to employees who commit serious norm transgressions. Ball, Trevino, and Sims (1994) show that aspects of distributive justice of a punishment system are associated with the subsequent performance of the punished employee (as indexed by the supervisor), and that procedural characteristics of the punishment system are positively associated with subsequent OCB of the punished employee. This research clearly puts into context the workings of punishment systems, which are usually argued to influence people's behavior by addressing their self-interested impulses.

Another example is the importance of justice for pay systems that have been specifically designed to promote performance, i.e., various types of merit pay systems. Such systems communicate an equity norm by explicitly tying pay to performance and have thus been argued to increase employee pay satisfaction and work motivation (Lawler, 1974). The pay satisfaction literature convincingly supports this argument: The more people view their performance as reflected in their salary, the higher their pay satisfaction (Heneman, Greenberger, & Strasser, 1988). Moreover, the extent to which

pay reflects performance is positively related to employee performance (Greenberg, 2003).

However, a focus on equity alone is not sufficient to improve organizational performance. This is because organizational performance often also relies on organization members cooperating in a cohesive group. Large pay dispersions, which can result from a focus on pay for individual performance, undermine team cohesion. On the other hand, focus on equality in pay levels is not the answer either because this undermines individual performance motivation and can stimulate high performers to leave the organization. When developing pay systems, organizations thus need to carefully balance equity and equality (Cropanzano et al., 2007). The specific balance should depend on the level of interdependence that is required for the organization's goods or services to be produced (Baron & Kreps, 1999). Furthermore, organizations should not only focus on the fairness of the outcomes of pay systems, but also on the fairness of decision-making procedures regarding these pay systems and interpersonal treatment because fair procedures and fair interpersonal treatment can mitigate the negative effects of outcomes that are perceived as unfair (Brockner & Wiesenfeld, 1996).

17.2.5 Concluding Remarks

Overall, various types of justice are important in stimulating different types of employee performance. Clearly, there are differences between the types of justice in promoting specific types of performance. Furthermore, these types of justice make other systems that are designed to stimulate performance (i.e., pay systems) and to discourage norm transgressions (punishment systems) more effective. Research has offered several explanations as to why these effects occur. Specifically, growing literatures support the role of exchange, identity, and affect-based explanations for the effects of justice on employee performance.

The above discussed explanations for the effects of justice on performance all show how justice motivates people to support the collective such as by improving their performance. Yet, these explanations disregard the fact that cooperative behaviors in response to justice are not a straightforward or easy thing to do. For instance, attempting to benefit the collective may conflict with organizational rules and regulations, and different types of performance may conflict with one another (e.g., in-role and extra-role performance; Morrison, 2006). van Dijke, De Cremer, Brebels, and Van Quaquebeke (in press) argue that, in addition to requiring motivation to support the collective, behaviors aimed at benefitting the collective require effective self-regulation in order to effectively act upon a person's intrinsic motivation. This argument is supported in an organizational field study and two laboratory experiments: only people who could effectively self-regulate their behavior responded with heightened levels of OCB and other cooperative behaviors to procedural justice. In terms of theorizing on motivation (e.g., Mitchell, 1997), justice provides direction to employee responses (i.e., by promoting cooperative behavior), but it may not always provide sufficient arousal, intensity, and persistence to result in actual cooperative responses.

Having discussed the role of justice in motivating employee performance, the next section deals with the role of justice in employees' relationships with their supervisors. We examine how theories of justice can be integrated with leadership theories and address antecedents of the enactment of justice.

17.3 Theme III: Justice and Leadership

Workplaces need to be coordinated in such a way that cooperation, productivity, and the welfare of the organization are promoted. Leadership, as a means of social influence that motivates, energizes, and inspires organizational members to pursue the collective interest as much as possible (Hogan, Curphy, & Hogan, 1994) plays an important role in this process. Fair outcomes, respectful, and just treatment can all be considered important leadership features that invite

subordinates to reciprocate in the most beneficial way possible. Unfortunately, very little theory and empirical research has explicitly addressed the question why and in what way leadership and justice are related (De Cremer & Tyler, 2011; De Cremer, van Knippenberg, van Knippenberg, Mullenders, & Stinglhamber, 2005). Although some justice theories do mention the idea of authority and thus leadership explicitly (i.e., the relational model of authority; Tyler & Lind, 1992), hardly any efforts have been undertaken to integrate both literatures. Here we argue that the role of justice in leadership can be situated at four different levels (see Fig. 17.1).

17.3.1 When Leadership Makes Justice Tick

In the present chapter, we argue that leadership is an important way of influence that allows justice to impact significantly on a variety of employee's outcomes. Specifically, this specific relationship can be looked upon in three different ways (see arrows A, B, and C in Fig. 17.1). As portrayed in *arrow A*, and in line with Van Knippenberg, De Cremer, and Van Knippenberg (2007), justice practices enacted by a leader can reveal important main effects on a wide variety of employee outcomes. This bulk of research—some of which we have already referred to in this chapter—convincingly shows that when leaders adopt distributively, procedurally, and interactionally fair

procedures, employee satisfaction, positive emotions, and intrinsic motivations increase and result in cooperative and citizenship behavior (Colquitt et al., 2001).

As portrayed in *arrow B*, the use of justice practices by a leader influences significantly justice perceptions and judgments and exactly those outcome variables can be one important dimension explaining leadership effectiveness (see also Van Knippenberg et al., 2007). For example, research by De Cremer, van Dijke, and Bos (2007) presented evidence that distributive, procedural, and interactional justice perceptions all contributed to explaining the effects transformational leadership can reveal. Transformational leadership includes four components: inspirational motivation, idealized influence, intellectual stimulation, and individualized consideration (Bass, 1998). The finding of De Cremer et al. (2007) provides evidence to the theoretical notion that "transformational leaders move followers to higher stages of moral development by directing their attention to important principles and end values as justice and equality" (Brown & Treviño, 2003, p. 158).

The effectiveness of a leader's justice practices may also be contingent on the style that a leader uses in the organizational setting (see *arrow C*). This specific relationship examining the interactive effects between justice and leadership styles is the central notion of the leadership fairness theory as postulated by De Cremer and Tyler (2011). According to these authors, leader-

Fig. 17.1 The role of justice in leadership
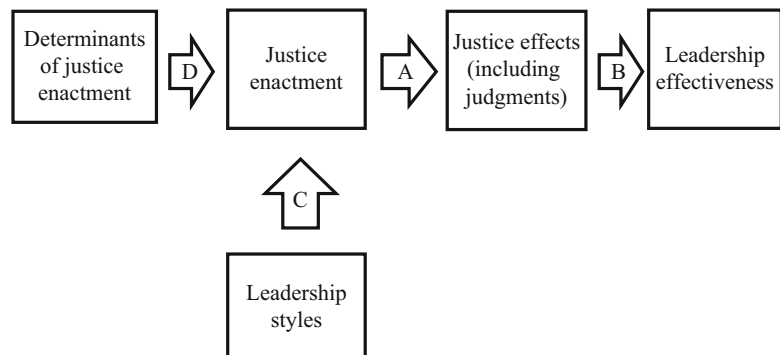
ship behaviors serve as a facilitator or boundary condition of justice effects because they may make certain human needs salient that justice is able to fulfill. For instance, if a certain leadership style activates people's fundamental need to belong, justice rules (i.e., procedural fairness such as voice) will become more important and influential as they address those belongingness needs directly (see De Cremer & Blader, 2006). In contrast, if leadership styles fail to enhance motives and needs that can be addressed by the employment of justice rules, leader fairness will have less of an impact. Thus, according to De Cremer and Tyler (2011) particular leadership styles and behaviors present conditions that make subordinates more self-involved, which, in turn, enhances the salience of their basic needs. According to self-determination theory (SDT, Deci & Ryan, 2000), the primary basic psychological needs of humans constitute autonomy, competence, belongingness, and self-esteem. These can all be satisfied—at least to some by leader's fair practices (see Greenberg & Colquitt, 2005, for an overview).

A series of studies by De Cremer and colleagues provided evidence in favor of this leadership fairness theory by showing that procedural fairness revealed a stronger or weaker impact on the feelings and behaviors of subordinates as a function of the specific leadership style in place (e.g., De Cremer & den Ouden, 2009; De Cremer et al., 2005; De Cremer, van Dijke, & Mayer, 2010; van Dijke et al., 2012). For example, De Cremer et al. (2005) showed that self-empowering leadership styles by motivating employees to reward themselves after having a job well done increased the salience of self-esteem. Under those circumstances, the positive effect of procedural fairness enacted by the leader was significantly enhanced compared to conditions where the self-empowerment style was perceived as low and not really present. van Dijke et al. (2012) demonstrated that empowering leadership that stimulates independent action decreases the need for information about respect and inclusion, whereas empowering leadership that stimulates self-development increases the need for such information. As a result, when stimulating independent employee action, the relationship between procedural fairness and employee OCB is weakened, whereas stimulating employee development strengthens this link.

17.3.2 Justice Enactment

Given that leader fairness can have profound effects on the development of fair and ethical climates and shape employee motivation and behavior, it is of utmost importance that we also understand (a) whether leaders indeed enact justice under the right circumstances, and (b) what types of leaders are most likely to do so and under what circumstances. This question is addressed in *arrow D* of our justice-leadership model (see Fig. 17.1). Unfortunately, despite the importance of this question, we know little about the conditions and motives underlying a leader's practice of justice. Below, we summarize the studies to date that have examined when and why leaders enact distributive, interactional, or procedural justice.

Enactment of Distributive Justice

A programmatic series of studies by De Cremer and colleagues (e.g., De Cremer, 2003; Stouten, De Cremer, & Van Dijk, 2005) showed that participants who were labeled as "leader" violated the equality rule when allocating resources compared to participants who were labeled as "follower." More precisely, in these studies participants were asked to be the first (from a group of four or six) to take a sum of money (e.g., €90) from a common resource while being allocated to the leader or follower frame condition. Being the first one to take from the resource means that there is no reference to what other group members do in that situation. As such, participants had to rely on their idea of what leader or follower means in terms of distributive justice. It turned out that followers took an equal share from the resource whereas leaders took significantly more than their equal share. Interestingly, participants in the leader condition reported to feel significantly more entitled to take a larger share from the resource than followers did.

Building on findings that people's allocation behavior is influenced by how they define themselves, Giessner, van Knippenberg, van Ginkel, and Sleebos (2013) examined whether leaders' self-definition in terms of the values and norms of the group they represent (i.e., group prototypicality) affect their collectively oriented versus self-serving allocations. Their studies show that leaders who consider themselves as group prototypical display allocation behavior that is more collectively oriented compared to leaders who do not see themselves as group prototypical. The latter type of leaders did, however, act more in collectively oriented ways when their allocation behavior was made identifiable to the others in the group. In the same tradition, Rus, van Knippenberg, and Wisse (2010) examined whether one's self-definition as a leader influences the allocation behavior of other leaders (descriptive norms) or the belief regarding what an effective leader should do (injunctive norms). Across six studies, their results show that normative information only has an effect on one's own allocation behavior when participants define themselves as a leader.

Related to the process of self-definition is how people perceive themselves in relation to others. Two important features of social self-definition are how powerful people are in affecting others and how positive other people view them (i.e., status). Blader and Chen (2012) convincingly show that power leads people to be less fair in their distributive justice behavior than status. Activating the idea of status makes people more focused on their social relationships with others, making them more pro-social in terms of allocations. This effect of status versus power has been found on both distributive and procedural justice enactment.

Taken together, if people define themselves as leaders, but do not see themselves as group prototypical but as more powerful unique individuals they engage in distributively less fair practices.

Enactment of Procedural Justice
Brebels, De Cremer, van Dijke, and Van Hiel (2011) demonstrate that in situations of crisis (as operationalized by a prevention focus; a crisis situation evokes a preventive attitude) the enactment of fair procedures depends on the leader's moral identity. Indeed, when a situation is perceived as threatening, many people are inclined to safeguard their personal interests and as such justice adherence will be put under pressure. Under these conditions, leaders with a strong moral identity are more likely to adhere to just principles and thus ensure that decisions are taken in a fair manner. Research by Seppälä et al. (2012) identifies another situational cue that can motivate the enactment of procedural fairness, that is, the extent to which the leader perceives his/her followers to be cooperative (e.g., helping). If followers are perceived to be cooperative, leaders are more likely to enact procedures in a fair manner. Furthermore, this effect was found to be mediated by the leader's trust in the employee. Finally, Heslin and VandeWalle (2011) show in a field study that the implicit person theory (i.e., extent to which one endorses the assumption that people can change) of the leader predicts how procedurally fair employees perceive the appraisal of their performance to be and these perceptions predict employee organizational citizenship behavior. Thus, the orientation of the leader plays an important role in enacting fair procedures, particularly having a moral, supportive, and trustworthy orientation toward others.

Another series of studies has focused on the concerns of followers as antecedents of leaders' procedural fairness enactment. In a series of experimental and field studies, Cornelis, Van Hiel, De Cremer, and Mayer (2013) show that if followers have a strong need to belong, leaders will give them more opportunities to voice their opinions, especially if the leader is very empathic. Adopting a similar approach, research by Hoogervorst, De Cremer, and van Dijke (2013) tested the idea that the two main concerns advocated by procedural fairness models, that is, that people value procedures because it gives them a feeling of control and belongingness, influence leaders in their decision to treat followers fairly. In their studies, they show that the most voice is given to followers who have a strong need for control, but particularly so when those followers

also express a strong need to belong. These studies thus show that leaders do enact fair procedures if their subordinates express concerns that can be adequately addressed by enacting procedural justice rules.

Enactment of Interactional Justice

Research by Scott, Colquitt, and Zapata-Phelan (2007) reveals that if leaders perceive followers to be charismatic, they experience fewer negative sentiments and more positive emotions, leading to higher interpersonal fairness. In a similar vein, Gilliland and Schepers (2003) show that leaders are more interactionally fair to followers who are perceived to contribute to the success of the leader's department. Leaders see these kinds of followers as instrumental in their success and can reward them by enhanced interactional justice enactment when those followers are assertive. Indeed, Korsgaard, Roberson, and Rymph (1998) provide evidence that assertive employees receive more positive and fair treatment in the context of performance appraisals. Finally, recent research by Zapata, Olsen, and Martins (2013) shows that perceived employee trustworthiness determines the extent to which leaders reciprocate by means of interactional and informational justice.

These studies thus reveal that if subordinates are perceived as active and influential by being assertive, trustworthy, charismatic, and being competent and successful, leaders are more likely to show respect to them. In a way these conditions facilitating the use of leader's interactional justice signal that those leaders use a more instrumental view on the exchange relationship they develop with their subordinates. If their subordinates are evaluated as actors that can be helpful to the successfulness, status, and position of the leader in the organization they receive better treatment. This is an interesting observation and can be aligned well with the idea that particularly leaders that are moving up the ranks and are placed in middle management are confronted with the dilemma of how much to invest in their own career development and how much in assuring fairness and support for their subordinates. As such, an important avenue for future research examining conditions leading leaders to employ

interactional justice is to look at the specific influence that the middle management position may exert on this process.

17.3.3 Conclusion

In contrast with the more classic approach to study responses to justice (theme 1 and 2), in this section we reviewed the emerging research that addresses what explains authorities' justice enactment. We believe this latter research presents an important step forward in our understanding of organizational justice. Yet, as we already mentioned earlier, many organization members are simultaneously followers (who respond to justice) and leaders (who enact justice). We know of only one justice paper that explicitly addresses this issue. Van Houwelingen, van Dijke, and De Cremer (in press) showed across a series of field and experimental studies that middle managers who are treated unfairly by higher level management sometimes respond by enacting unfair procedures toward their own subordinates (i.e., assimilation) and sometimes by enacting fair procedures (i.e., contrast). Whether middle managers act in assimilative or contrasting ways depends on whether they define themselves as interdependent with top management or not. Interestingly, by influencing middle managers' self-definition, even the spatial distance between middle and top management influences whether middle management assimilates or rather contrasts away in terms for fairness enactment from top management. Although these findings present some intriguing implications for theory and practice, clearly, much more research is needed that acknowledges the dual role of simultaneously being a leader and a follower.

17.4   Theme IV: The Role of Justice When Employees Leave the Organization

Various types of justice play an important role when employees enter the organization and during their stay in the organization, but they are also

relevant when employees leave the organization. Just as the phase when potential employees become interested in organization membership, leaving the organization can be a time of great uncertainty. In line with the uncertainty management model, particularly in such times, justice plays an important role for employees. In the following sections, we first describe the direct effects of justice on employee turnover. Subsequently, we discuss the role of justice in situations in which some employees are forced to leave the organization and others are allowed to stay, as is the case in layoff contexts.

17.4.1 Justice and Turnover

Justice has a direct influence on employees' motivation to stay in the organization or, conversely, to leave. Specifically, low levels of justice decrease both commitment to the organization and job satisfaction. As noted, this is the case particularly for procedural and distributive justice, and somewhat less so for interpersonal and informational justice (Cohen-Charash & Spector, 2001; Colquitt et al., 2001). Most empirical studies in this area report a significant negative relationship between justice (most research focuses on procedural justice) and turnover intentions (e.g., Aquino, Griffeth, Allen, & Hom, 1997; Schaubroeck, May, & Brown, 1994). Interestingly, studies examining the specific effects of procedural justice on turnover behavior have generally reported more varied findings. Some reveal nonsignificant results (e.g., Jones & Skarlicki, 2003), whereas others show a negative relationship between procedural justice and turnover behavior (Greenberg, 1990).

Posthuma, Maertz, and Dworkin (2007) provide a reason for these diverging findings—at least with regard to the effects of procedural justice. They show that the relationship between turnover behavior and procedural justice depends on the specific procedural justice dimension. They studied voluntary turnover behavior among nurses in a work scheduling context and show that the procedural justice dimension of advance notice was significantly and negatively related to turnover behavior, whereas the dimension of representativeness of views was significantly and positively related to turnover. According to the authors, these results emerge because representativeness conflicts with self-interest in this situation. That is, representativeness indicates that others have a say in the work schedule, which will generally lead to a less optimal work schedule for oneself.

17.4.2 Justice and Downsizing

Over the last decades, downsizing has become increasingly popular as an intervention to increase many aspects of organizational effectiveness. This popularity is not restricted to Anglo-American and European contexts, but can also be observed in contexts that have traditionally stressed the importance of communal norms and a long-term connection of employees to organizations such as in China, Japan, Hong Kong, and South Korea. However, downsizing seldom leads to desired results, not in terms of efficiency/productivity, but also not in terms of market value, profitability, reputation, or growth in sales (Datta, Guthrie, Basuil, & Pandey, 2010).

One reason why these desired effects on organizational performance often do not materialize is that downsizing is perceived as a highly negative experience both for the employees who are forced to leave the organization (i.e., "victims") but also for those who stay (i.e., "survivors" of the downsizing process). In fact, downsizing has been argued to violate the implicit expectations and felt responsibilities of survivors and victims who must leave the organization (Morrison & Robinson, 1997). This has important effects on the responses of victims and survivors. For instance, a number of studies show that downsizing is associated with reduced organizational commitment and job involvement among survivors (e.g., Brockner, Higgins, & Low, 2004). Victims of downsizing are more likely to take legal action (Goldman, 2001), slander the organization to peers (Konovsky & Folger, 1991), and

engage in violence or sabotage against the organization or its members (Wilkinson, 1998).

Because downsizing is experienced as a highly negative event, justice perceptions are important to both survivors and victims. Research shows that justice perceptions are influenced by employee perceptions of whether (a) the layoff is necessary to begin with, (b) decision criteria used in identifying who should leave and who should stay are appropriate, and (c) victims and survivors feel that victims are fairly treated and adequately provided for after the process (Shah, 2000). Furthermore, Mansour-Cole and Scott (1998) show that procedural justice perceptions are higher when managers, rather than other sources, announce and explain an imminent layoff, especially in relationships characterized by high mutual trust, respect, and obligation.

The relevance of justice in the downsizing process is also apparent from the perspective of fairness heuristic theory (Lind, 2001). Periods of downsizing are times of great uncertainty for employees. Fair information provides a relevant source to make sense of the situation (De Cremer, Brockner, et al., 2010) and most importantly perhaps, is useful for assessing the authority's intentions and trustworthiness. If the downsizing decision process is considered to be fair, the negative effects of downsizing could be mitigated. On the other hand, perceptions of procedural injustice may strengthen negative responses to downsizing. In support of this argument, Brockner et al. (1994) find that more severe layoffs predict lower trust in the organization. However, this negative effect of layoff severity is absent in situations of high procedural justice.

However, justice plays a much broader role in mitigating negative responses to downsizing. Laid off employees can also negatively influence the organization. To mitigate these effects, researchers have often focused on the role of informational justice, that is, the degree to which decisions made by the organization are explained to employees (Bies, 1987). Adequate explanations (i.e., explanations that are appropriately detailed, clear, and reasonable) and provided in a timely manner promote perceptions of informa-

tional fairness because they help victims of layoffs make sense of the difficult situation they are in. Moreover, layoffs that are handled with informational fairness signal to victims that they are worthy of dignity and respect (Bies & Moag, 1986). Research shows that providing layoff victims with an adequate explanation for the layoff increases perceptions of fairness (e.g., Brockner et al., 1994; Greenberg, 1994) and weakens negative victim reactions (Shaw, Wild, & Colquitt, 2003).

As noted, a large number of studies show that downsizing negatively affects job involvement and organizational commitment among survivors (see Datta et al., 2010, for an overview). Research shows that the negative effects of downsizing on these variables are weaker with high levels of interactional and procedural justice (Brockner et al., 2004). Trevor and Nyberg (2008) report that downsizing predicts voluntary turnover behavior among survivors, and that this effect is mediated by organizational commitment. However, procedural justice weakens this mediated effect. Furthermore, Chang (2002) shows that the negative effects of downsizing on the attachment and commitment of survivors are weaker when distributive justice of the downsizing operation is perceived as high.

A meta-analysis by van Dierendonck and Jacobs (2012) confirms many of the above outlined findings. They focus on commitment to the organization as the outcome and consider the responses of both victims and survivors of the downsizing operation. This meta-analysis reveals a positive relationship between justice and organizational commitment for both survivors and victims and shows some evidence for the process that explains why justice is of such importance in downsizing settings. van Dierendonck and Jacobs (2012) find that the impact of justice is stronger in individualistic than in collectivistic cultures and that justice is more important when the layoff is initiated for profit maximization rather than for economic necessity.

Finally, research has also revealed interesting effects of variables that describe how employees relate to the organization prior to the downsiz-

ing operation. For instance, Brockner et al. (1994) show that unjust procedures associated with a downsizing operation result in lower organizational commitment and self-reported work effort, and higher turnover intentions particularly among employees who were previously strongly committed to the organization. Other important effects have been reported by Wiesenfeld, Brockner, and Thibault (2000). They show that particularly managers who were laid-off (compared to organization members who do not have a management position) respond to procedural injustice with reduced self-esteem. This is because managers are more committed to the organization than employees. In sum, unjust downsizing procedures seem to have a particularly negative impact on the commitment and self-views of the most dedicated members.

17.5   Conclusion and Discussion

The topics that are addressed in this chapter clarify that justice is important to our understanding of organizational phenomena at each of the stages under discussion: during the selection process, during the time people work as organization members and need to be motivated to contribute to the organization's welfare, and during downsizing operations. Yet, this overview of the role of justice at the workplace necessarily was restricted in scope. For instance, in line with the majority of research we considered mostly outcome variables of justice that are relevant from the organization's perspective, such as employee commitment and performance. Yet, justice also impacts employee well-being. For instance, low levels of justice are associated with employee stress (Judge & Colquitt, 2004) and health complaints (De Boer, Bakker, Syroit, & Schaufeli, 2002). As another example, we focused almost exclusively on distinct effects of the various justice dimensions. However, a host of studies show that different justice dimensions interact with each other to influence outcome variables that

we discussed in the various themes in this chapter (see Brockner & Wiesenfeld, 1996, 2005, for overviews of this research).

The context of work organizations provides an important testing ground for the role of justice dimensions and justice theory, but also offers a unique aspect to the study of justice, at least when compared with the legal settings in which the role of procedural justice was first investigated (Thibaut & Walker, 1975). The authority in legal settings is supposed to be impartial, having no vested interests in the outcomes of the decision. This differs sharply from the role of organizational managers (Cohen, 1985), who enact decisions that have implications for employee outcomes, but at the same time have a vested interest in the outcome of the decision (i.e., that the organization functions effectively). In other words, attempts to maintain high levels of interactional, informational, and procedural justice may sometimes be used strategically to "sell" unjust outcomes to employees. Such a strategy-based approach to justice may work for some time, and it may be necessary to "appear fair" rather than only "being fair" (Greenberg, 1988). Yet, in the long run it may actually result in a loss of trust. Justice effects can only flourish under circumstances where trust is present or can potentially be developed in a positive way (see De Cremer & Tyler, 2007).

We hope that the insights provided by our overview will (a) reveal a strong input to theory and empirical-based research exploring the management of justice processes throughout the business cycle of an organization, and (b) motivate researchers to explain and formulate more clearly to practitioners and companies the importance of justice in their organizational reality, and how justice principles can be employed in the most effective way.

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Justice in the Couple and the Family

18

Dorothea Dette-Hagenmeyer and Barbara Reichle

"To ask whether a society is just is to ask how it distributes the things we prize—income and wealth, duties and rights, powers and opportunities, offices and honors. A just society distributes these goods in the right way; it gives each person his or her due. The hard question begins when people ask what people are due, and why" (Sandel, 2009, p. 19). Couples and families are societies on a small scale, they generate and follow rules for distributions, evaluate the justice of distributions, and react with emotions and actions to just and unjust outcomes. This will be outlined first. After the general pattern, research on justice in close relationships is summarized, with the largest section dealing with household distributions, followed by a review on consequences of injustice, efforts to install justice in the couple, and some research on justice in the context of divorce. The relationship section is completed with research on same-sex couples. The last section deals with justice among kin—siblings, intergenerational issues, and consequences of injustice.

18.1 The General Model: Causes and Consequences of Injustice

Feelings of injustice arise when a rule for a distribution is applied which does not seem to be appropriate to a recipient or an observer. The *general reactions in terms of emotions and actions* are described by cognitive emotion theorists (e.g., Frijda, 1986; Ortony, Clore, & Collins, 1988). In the more straightforward cases, feelings of anger, outrage, disappointment, envy, and sadness will arise, and actions will be taken to set things right, either by a correction of the distribution or by a correction of the evaluation as unjust. Additionally, a victim may elicit feelings of pity in an observer, and actions of support and consolation. In more complex cases, injustice may lead to schadenfreude in the light of the misfortune of the victim (Feather, 2014).

If a correction seems impossible, injustice can be accepted, most likely with feelings of helplessness and resentment. Otherwise, *motivated coping* may occur, with reappraisals in order to reduce or even eliminate the experience of injustice. The reduction of injustice can be achieved be shifting the focus of comparison in a way that leads to a more favorable outcome (as is described in studies on the relative deprivation of working women; cf. Crosby, Pufall, Snyder, O'Connell, & Whalen, 1989, see below). Belief in a just world can motivate a reduction or even an elimination

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of feelings of injustice by means of trivializing the damage that has occurred, by blaming the victim and other strategies that restore justice cognitively (Lerner, 1980).

Rules underlying distributions of resources are based on criteria like economy, feasibility, justice, and others. Many of these rules are culture bound (Leung & Stephan, 2001). The distribution of resources is especially likely to provoke justice considerations if resources are scarce and if a distribution does not comply with the favored rule of a person who is involved in the distribution (a recipient), or with the favored rule of an observer. Besides such *individual justice ratings*, second-order justice ratings concern the *concordance or discordance of the justice ratings* of various actors, recipients, or observers. Consequently, justice can vary between the actors in a distribution (e.g., if their principles of a just distribution are discordant, or if their ratings of the mutual contributions are discordant) or it can be concordant (e.g., if they apply the same principle or rate their contributions as equal).

Besides these *subjective ratings*, there are *more objective judgments* that are based on societal or legal norms for determining familial distributions, duties, rights, and other *objects of justice*. The most general legal norms that refer to justice in families and close relationships can be found in the human rights carta or in codified family law (e.g., rules that prescribe how to justly distribute a family's income or the appropriate behavior of spouses) of rights and duties that might lead to divorce or death by stoning if violated, to the placement of a child or relative in public custody, or to the disinheritance of a family member.

Subjective and judicial norms are based on *principles*. There are at least three different kinds of principles (Reichle, 1996; Törnblom, 1992; see also Jasso, Törnblom, & Sabbagh, 2016, Chap. 11 of this handbook): According to *allocation principles*, distributions are based on a potential recipient's characteristics. There are at least five different allocation principles that can be distinguished: According to the principle of (a) equity, the amounts of goods that are distributed have to be proportional to a person's costs, investments, or merit. According to the (b) equal-

ity principle, each actor deserves the same amount of the resources in question in an egalitarian way. The principle of (c) need favors the person who has the greatest need. The principle of (d) power holds that those with more power, authority, status, control, or the like should get more than those in lower level positions. The principle of (e) responsibility prescribes that those who have more (especially more than they need) should donate resources to the less fortunate (see Forsyth, 2010).

Procedural principles concern the fairness of the rules that regulate the allocation process (Leventhal, 1980; see also Vermunt & Steensma, 2016, Chap. 12 of this handbook): Third-party control is rather unlikely in western families, but it is likely in eastern families where parents arrange the marriages of their (more or less) adult children and make rules about how resources are distributed in these marriages. Related to this idea is the casting-vote principle, which assigns the privilege of deciding to a member of the group (e.g., the male as the head of the family has the final say). A ballot or lottery provides equal chances when there is no one to control the allocations. A negotiation refers to a democratic process that follows fixed rules (in extenso, Rawls, 1999, four-stage sequence).

Retributive justice principles (Darley & Pittman, 2003; Okimoto, Wenzel, & Feather, 2009; see also Wenzel & Okimoto, 2016, Chap. 13 of this handbook) concern the principles of just reactions to transgressions, involving compensation, retribution, or rehabilitation (Stalans, 1996). While retributive justice "refers to the repair of justice through unilateral imposition of punishment, (…) *restorative justice* means the repair of justice through reaffirming a shared value-consensus in a bilateral process" (Wenzel, Okimoto, Feather, & Platow, 2008, p. 375; see also Cohen, 2016, Chap. 14 of this handbook). In the context of justice in the family, restorative justice has been applied in the context of crime, most frequently partner violence (e.g., Koss, 2000).

Outcomecharacteristics or distributionresult rules concern the characteristics a just distribution should have. Egalitarian vs. specialized, and conform vs. nonconform distributional outcomes can be distinguished (Reichle, 1996). Egalitarian

means that each member ends up with exactly the same share (e.g., each spouse performs the same tasks for the same amount of time). Specialized means that each actor is allowed to engage in what he or she prefers or does best. Conform means that a distribution is in accordance with what a societal majority considers appropriate (e.g., a mother's share of childcare is larger than the share of a father, and a father's amount of breadwinning is larger than the amount of a mother). Nonconform means a distribution is in discordance with what the majority considers appropriate (e.g., stay-at-home fathers and sole breadwinner mothers).

Each of these outcomes can be the result of the application of various principles of allocation, procedure, retribution, and restauration. As an example, an *egalitarian distribution* of child care in a divorced couple can be the result of an application of the *need* principle, since the father has to compensate for the interruption of the mother's career and to enable her to finish some training in order to be able to make her own living. This could have been achieved in a *negotiation procedure* after the father's income had been withheld (*retribution*) because of noncompliance with child support obligations in order to *restore* justice.

A different set of rules is proposed by anthropological relational models theory, which postulates four different types of relationships with corresponding modes of social interactions: communal sharing, authority ranking, equality matching, and market pricing (Fiske, 1991). The communal orientation is interesting as it is postulated to be the dominant orientation in family relationships. The communal framework is "based on duties and sentiments generating kindness and generosity among people considered to be of the same kind, especially kin" (Fiske, 1991, p. 14), with a moral basis of "caring, kindness, altruism, selfless generosity … protecting intimate relationships" (Fiske, 1991, p. 46). There is no track keeping of balances, turn taking, and equal shares as there is in the equality matching framework. Rather, "everyone pitches in and does what he or she can … Tasks are regarded as (the) collective responsibility of the group, without dividing the job or assigning specific individual duties" (Fiske,

1991, p. 42)—which seems to be similar to the need principle outlined earlier. Goodnow (2004) reports that a minority of 11 % Anglo-Australian families distributed their chores in accordance with this framework.

Besides the favored justice principles and rules, research on justice in the family has focused on the prediction and consequences of injustice. The largest body of research deals with injustice in close relationships, with many studies focusing on the distribution of housework in heterosexual couples, and some newer studies focusing on same-sex couples. Another justice issue in close relationships concerns separation and divorce. Only a few studies deal with justice among siblings, and with justice in the extended family. These topics will be addressed in the following parts.

18.2 Justice in Close Relationships

One can think of many objects that could be unfairly distributed between partners in a close relationship (e.g., support, care, power, marital violence). Surprisingly, the largest body of research has focused on the distribution of roles and duties, especially housework. Why?

> Freedom in love radically alters the standing of women, but it doesn't, certainly not in an automatic way, end their oppression. For that oppression is only partly situated within the family. As a little economy and a little state, ruled by a father-king, the family has long been a setting for the domination of wives and daughters (and sons, too). It isn't difficult to collect stories of physical brutality or to describe customary practices and religious rites that seem designed, above all, to break the spirits of young women. At the same time, the family has long been the woman's place; she was absolutely necessary to its existence and then to its well-being; and at some level, in most cultures, she had to be regarded as a valued member. Within the household, if only there, she often possessed considerable power. The real domination of women has less to do with their familial place than with their exclusion from all other places. They have been denied the freedom of the city, cut off from distributive processes and social goods outside the sphere of kinship and love. … But what is most important right now is that the market, as it actually functions and as we understand its function-

ing, sets no internal bar to the participation of women. It is focused on the quality of goods and on the skill and energy of persons, not on kinship standing or sex … The family will certainly be a different place when it is no longer woman's exclusive place… it may well prove a more fragile association than the kinship groups of other and older societies (Walzer, 1983, pp. 239–242).

Maybe housework is the nucleus of the shift to modern families in modern western societies—the stage we are currently observing. Women feel entitled to "the freedom of the city," "the market," and consequently, for a functioning family, their formerly privileged claims need to be shared by their husbands, who are more or less reluctant to trade their high breadwinner status for the lower status of an unpaid child care worker and homemaker.

18.2.1 Injustice in the Distribution of Housework

Housework includes all unpaid labor done to maintain the household or run a family (e.g., household chores, childcare, maintenance of appliances, repairs, gardening; Coltrane, 2000). The division of paid and unpaid work between the sexes is related to household tasks and is another prevailing issue of injustice in families. These tasks may spill over onto each other and may also be related to each other (Grzywacz, Almeida, & McDonald, 2002).

The *antecedents ofperceived injusticein the household* can be viewed from two perspectives. First, there is the division of the housework itself. Second, there is the perception of this division as just or unjust. For the latter, the real situation is compared with a normative prescription or with the divisions practiced by other people in comparable situations. Both perspectives are needed to explain a given situation. The antecedents of both real and perceived injustices in the division of housework are rooted in the attitudes of the sexes toward what constitutes fair shares of work. Historically, women and men had separate areas of work. A comparison of men's or women's work was difficult to conduct and dealt with the question of "what" rather than with "how much."

With the increased participation of women in higher education, this gender-based distribution has changed. Now men and women often perform the same tasks in the work force, and comparisons according to justice principles are possible. However, as a couple enters parenthood, the new additional role of parenting forces couples to redistribute their tasks (Cowan & Cowan, 1992; Reichle & Montada, 1994; Schulz & Blossfeld, 2006), and the large majority reinstalls the traditional distribution. With the outsourcing of childcare and the increasing independence of children, most couples move back toward a more egalitarian distribution (Reichle & Zahn, 2006).

Several theories offer explanations for these differences. Economists often see power differentials as the source of this situation (see Behrman, 1996). According to Thibaut and Kelley (1959), there are two types of power. Fate control is the ability of one partner to affect the other partner's interaction outcomes. Behavior control is one partner's ability to influence the other partner's behavior or behavioral alternatives through the first partner's own behavior. One partner is in a position of power and can determine not only his or her own behavior and outcomes but also the other partner's behavior and outcomes, whereas the other partner is dependent. For instance, until 1977, in Germany, the husband was allowed to singlehandedly end his wife's employment—even against her declared protest—if he thought that her employment resulted in neglect of the household. Exchange theory (Cropanzano & Mitchell, 2005; Thibaut & Kelley, 1959) sees differences in resources as a reason for this kind of situation. The termination of a relationship results in costs for both partners. However, one partner may have lower costs than the other because he or she may have more options, more money, more social and informal support, and so forth. The more interdependent the partners are, the smaller the power differential. In patriarchal societies, such as the ones found across Europe and North America, men have traditionally had more options and the power of decision as men have tended to be economically independent, and

women have not. It is usually the father or husband who is seen as the head of the family and therefore in charge of family decisions. Wives or mothers are in charge of household decisions because they are traditionally ascribed a certain expertise in this field.

Another source of power can be money. The amount of money a person earns through paid work influences the power differential in two ways. First, the person experiences positive appreciation because what he or she does is worth the money he or she receives. Second, the money enables the person to purchase goods that can then be used to illustrate his or her socioeconomic status (Liebig, Sauer, & Schupp, 2010).

Classic sociological and psychological models also seek to explain the division of housework (e.g., Aassve, Fuochi, & Mencarini, 2014). Prominent models represent time availability (e.g., Gough & Killewald, 2010), relative resources (e.g., Brines, 1994), and gender ideology (e.g., Greenstein, 1996, 2009). The time availability model predicts that the partner who spends less time on paid work will spend more time on housework. However, time availability cannot be the only explanation. Gough and Killewald (2010) found that even when husbands lost their jobs, their weekly time spent on housework changed by less than 2 h, not enough to compensate for the existing gender gap of 12 h per week of housework. Relative resources models assume that the partner who earns more money (i.e., has more resources) will do less housework, and the partner who earns less cannot "buy him/herself out" of housework. However, recent research has shown that in addition to relative resources, the absolute resources of women are an especially important factor. The more absolute resources a woman has, the fewer hours of housework she does (Sullivan & Gershuny, 2012). Gender ideology draws on traditional beliefs about who does what and sees women as more or less responsible for housework. When women engage in housework, this belief is confirmed, whereas when men do housework, this belief is contradicted. However, Carlson and Lynch (2013) found a mutual and reciprocal relation between the division of housework and gender ideology for both husbands and wives.

Still another conceptualization of the perception of a distribution as just or unjust is that of entitlement as described in the distributive justice framework (see Major, 1993; Thompson, 1991). This approach combines the psychology of entitlement (see Major, 1993) and the social psychology of distributive justice (see Deutsch, 1985). According to the theory, women may be content even when the distribution of household labor is unbalanced. Even if a distribution does not follow equity or equality rules and results in an unbalanced arrangement, the gendered nature of perceptions of fairness and entitlement in close relationships may lead to this counterintuitive finding in female satisfaction. This suggests that people perceive a situation, an event, or treatment as just if they get what they believe they are entitled to by virtue of who they are (e.g., a woman or a man) or what they have done. Many theories of social justice consider this to be the most central aspect of justice.

According to the authors (Major, 1993; Thompson, 1991), there are three components that are important for justice considerations in the household: (a) the comparison referents or the comparison standards that are used (i.e., who or what is compared); (b) the outcome value (i.e., if housework is considered a burden only or if it has positive aspects); and (c) justifications (i.e., if there are reasons that support why the current distribution is just; for an overview, see also Mikula, 2013). The comparison standard is the who or what that a person compares him- or herself with when judging the fairness of the distribution of household labor. There are two possible comparison standards: the partner in the relationship (i.e., a relational comparison) or, as Major (1993) observed, an external man or woman in a similar situation (age, family constellation, etc.; that is, a referential comparison). "In the latter context, women may be quite satisfied with how their relationship 'stacks up' (Buunk & Van Yperen, 1991). If a woman compares her situation with that of a female friend, for example, she may see herself as fortunate, 'one of the lucky ones' (Hochschild, 1989), even if she shoulders the bulk of household responsibilities in her own relationship" (Dixon & Wetherell, 2004, p. 171).

Relational comparisons, on the other hand, are more often associated with feelings of injustice.

The value of the outcome is also critical. If household chores are seen as aversive and burdensome, feelings of injustice will arise even if the distribution is close to an egalitarian split. However, if a good family climate with close and trusting relationships is important to a woman, she may be willing to invest more than an equal share in household chores if she feels that this helps her to reach this goal. Also, if she feels that her household labor is appreciated (e.g., Sanchez & Kane, 1996) and if she feels that she matters to her husband (Kawamura & Brown, 2007), such feelings may lead to a perception of justice in unbalanced distributions. Last but not least, many women justify their husbands' lower engagement (i.e., they seek good reasons that can explain why the given distribution is just). Potential reasons include societal prescriptions about male and female roles but also the conviction that certain tasks may be inappropriate for men because of a lack of ability, time, or resources. Limited contributions to household tasks may thus be excused. "[…]A sense of procedural and interactional justice, in other words, may mask injustice at the level of distributive outcomes" (Dixon & Wetherell, 2004, p. 172).

Another kind of injustice can arise from unstated or explicit discrepancies between the preferred or practiced models of two or more family members, especially if such discrepancies violate the assumptions of a family member. Examples are "mothers describing themselves as frequently using phrases such as 'this is a home, not a restaurant, boarding house, delicatessen, hotel, laundromat, etc.' They pointed out the need for children to learn the difference between 'mothers' and 'maids' and the importance of not behaving like 'a king' or 'a queen' expecting everyone to pick up after them. … Fathers were likely to say that they were not 'running a taxi service,' or were not 'automatic banking machines.' Children would use, toward each other, phrases such as 'I'm not your slave,' 'you're not paying me,' or 'who do you think you are?'"(Goodnow, 2004, p. 169).

This finally points to the issue of socialization of entitlement and obligation with respect to the household system. From childhood to adolescence, girls perform more household tasks than boys of the same age, parents assign tasks to their children according to gender, especially fathers, boys are more likely to be paid for the jobs they do (for overviews see Emler & Hall, 1994; Goodnow, 1988). In a UK study with adolescents, females contributed to more areas of household labor but received fewer kinds of benefits than males (telephone, motorbike, car, video, own room) with one exception (space to invite friends to stay). Females had more egalitarian beliefs than boys, but egalitarian beliefs were related to experiences of domestic labors in boys only—those who performed more female tasks had stronger egalitarian sex-role beliefs. For females, neither contributions nor fairness ratings of the contributions were influenced by their beliefs about appropriate roles and obligations for males and females. They seem to accept demands made of them as fair and at the same time claim for equal distributions of obligations: "… another example of the phenomenon documented by Crosby (1982), the tendency for females to agree that the category to which they belong is unfairly disadvantaged but not to recognize that they personally are in this position?" (Emler & Hall, 1994, p. 299).

18.2.2 Consequences of Perceived Injustice in Distributions

Relationship satisfaction is one of the consequences of perceived (in)justice. If the object of the unequal distribution is the amount of paid work, the consequences vary by country: In West Germany, couples with part-time working wives are significantly more stable than couples with full-time employed wives. In the UK and US, neither part-time nor full-time employment significantly alters the risk of divorce. In the US, however, mothers working part-time have a significantly lower risk of divorce. West German and British husbands' unemployment was found to be more detrimental to marital stability than

wives' employment (Cooke & Gash, 2010). In a similar vein, a large Danish study found that men who were outearned by their wives were more likely to use erectile dysfunction medication than their male counterparts, whereas breadwinner wives and husbands alike used more anxiety and insomnia medication (Pierce, Dahl, & Nielsen, 2013). This effect has also been shown for marriage markets. Marriage rates decline as the likelihood of males being outearned by females increases. In a relationship, when the woman has the potential to outearn her partner, the woman is less likely to engage in paid work and is also more likely not to earn as much as she could. In couples where the woman outearns her husband, she still does more housework, relationship satisfaction is lower, and divorce is more likely (Bertrand, Kamenica, & Pan, 2015). Thus, it seems that men are more vulnerable to unequal distributions of paid work and income than women, a finding that is in accordance with traditional gender roles. Specifically, the imbalance between paid and unpaid work between the sexes as well as the workload itself leads to various negative outcomes such as distress, lower life satisfaction, and lower relationship satisfaction (Coltrane, 2000).

Although women's participation in the work force has been growing continuously in recent decades, women still perform the majority of the housework (Lothaller, Mikula, & Schoebi, 2009) and reduce the amount of paid work they do in order to accomplish this (see Gager, 2008). Often, they do not reduce the amount of paid work but still do more housework (for an overview, see Blair, 2012). Interestingly, it is not so much the division of household labor itself, but rather the perception of it as just that exerts the main influence on well-being. Couples who see themselves as having equal rights in their relationship report higher relationship satisfaction (Gottman & Notarius, 2000). Nevertheless, relationship satisfaction is not necessarily lower in couples who decide to embrace the traditional model. In dual-earner relationships, the female often performs the bulk of the household chores and childcare on top of her paid work. Thus, the work—both paid and unpaid—results in more total hours than in traditional relationships (Stutzer & Frey, 2006). This may explain women's lower satisfaction scores in dual-earner relationships. In dual-earner couples, unfair distributions of household chores predicted lower marital satisfaction in both spouses but predicted divorce for women only (Frisco & Williams, 2003).

Only a small percentage of wives perceive this distribution as unfair (Gager & Hohmann-Marriott, 2006). Surprisingly, many women perceive such an unequal distribution as just, even if both partners are working (Braun, Lewin-Epstein, Stier, & Baumgärtner, 2008). In part, women compare their long hours in the household with their husbands' long hours at work (Öun, 2013).

An explanation for this distortion of reality can be found in the just world hypothesis. This describes the popular belief that in a just world, everyone gets what they deserve and deserves what they get (Lerner, 1980; see also Hafer & Sutton, 2016, Chap. 8 of this handbook). It is a cognitive strategy to restore justice for the sake of one's own well-being. In this case, women take a distribution that is uneven in reality, and they reinterpret it as even by switching the comparison standard. Crosby et al. (1989) also see women's denial of their personal disadvantage as a motivated phenomenon: As a group, women feel deprived in comparison with men, but in comparison with less fortunate individual women, working women manage to see themselves as more fortunate or less disadvantaged. This prevents women from viewing themselves as victims. Other explanations focus on the fact that because household chores are often not measurable by the dollar, they are seen as less important than paid work and are therefore discounted in the estimation of who does how much. Another reason is that the partner who earns more of the family income may buy him/herself out of household chores (Gager, 2008). This is aggravated by the wage gap between women and men at comparable educational and job levels (DeNavas-Walt, Proctor, & Smith, 2013; see also Coltrane & Shih, 2010). In addition, attributions of responsibility for the situation are important (Reichle, 1996). If the situation with its constraints (e.g., insufficient childcare system, compulsory school

schedules, high marginal tax rates for second earners, etc.) rather than the partner is perceived as the cause of the injustice, satisfaction is higher (Reichle, 1994a). But if the total number of hours rises above a certain threshold, this leads to distress and related negative outcomes, which may explain why women in egalitarian relationships report lower well-being (Stutzer & Frey, 2006).

Research in social psychology has also found negative relations between relationship quality and the belief that the partner is responsible for problems (e.g., Fincham, 1994; Karney & Bradbury, 2000; Reichle, 1994a). Unrealistic or violated expectations (e.g., Kurdek, 1993; Reichle, 1994b) and experienced unfairness (Reichle, 1996) are related to lower relationship satisfaction. Notably, the various predictors of relationship satisfaction are highly correlated (e.g., blaming the spouse, experienced unfairness, anger, disappointment, indignation, accusation, and withdrawal), which is completely in line with the general pattern of injustice and related emotions and actions outlined by cognitive-emotion-action theories (see above).

Perceived justice also mediates the relation between housework and relationship satisfaction. The more wives felt that their housework was a burden, the more they viewed the distribution as unjust and the less satisfied they were with their relationship (Mikula, Riederer, & Bodi, 2008). Also, the more women felt that their obligations in the household and in childcare interfered with their obligations in paid work, the less just they perceived the division of the work between the sexes; and the less justice they perceived, the less satisfied they were with their relationship (Andrade & Mikula, 2014). Interestingly, this mediation was found mainly for women. For men, justice was not related to the division of housework or to their relationship satisfaction (Mikula, Riederer, & Bodi, 2012). However, men were affected by aspects of justice via partner effects. The less justice wives perceived, the more relationship conflicts were reported by men, and the more conflict they experienced, the less satisfied they were (Mikula et al., 2012).

18.2.3 Efforts to Install Justice in the Couple

Efforts to install justice in the couple toward more egalitarian distributions have been documented in extensive case studies of 50 couples by Goodnow and Bowes (1994). Evidently, fairness and a preservation of the quality of the marital relationship were the most powerful motivations identified in these extraordinary couples, but public discussions about paid and unpaid labor within families in the context of women's increased participation in the labor force also did play a significant role. On the political side, many European governments have reacted to these societal changes with some sort of adaptation of their family policies. Companies and government institutions have installed equal opportunity officers. No-fault divorces and joint custody of children after divorce are practiced in most western countries. Both parents' names can become the family name and the family name of the children. Parental leave from work is legally installed in many countries. Some countries such as Germany, France, and the Scandinavian countries have installed a tax-financed payment for families to provide financial support to compensate for the costs of bringing up a child. Also, in Germany, this benefit is paid for two more months if the other parent (usually the father) takes a parental leave. In Sweden, a short paternal leave was even reported to increase subsequent fertility (Duvander & Andersson, 2006).

To summarize, most couples state that ideally, housework should be equally split between partners (Coltrane, 2000). Whereas 62 % of US-American women and men prefer the modern marriage in which the husband and wife both work outside and inside the home, only 30 % of the fathers reported that they provide the same amount of childcare as their partners (Harrington, Van Deusen, & Humberd, 2011). Discrepancies between the ideal and reality more frequently originate in men's expectations that women step back from work and engage in housework and family responsibilities than in comparable expectations of females (Gerson, 2010). In a large Australian study, mothering involved not only

more overall time commitment than fathering, but also more multitasking, more physical labor, a more rigid timetable, more time alone with children, and more overall responsibility for managing care. These gender differences in the quantity and nature of care applied even when women worked full-time (Craig, 2006). It seems that often times, psychological corrections are employed in order to allow unequal distributions to be perceived as fair.

18.2.4 Justice in Separation and Divorce

When marriages end, relationships continue, albeit in new forms. Parents remain parents, partners can become subsistence payers or receivers, and alimony payers or receivers. The existing studies have focused on the distribution of alimony, child support, and child custody. In all these studies, the operationalizations of justice are rather simple, with justice being conceptualized as fairness.

In a qualitative study on injustice in divorce (Rettig, 2007), women who were formerly married to wealthy men reported on the stressors of unfair divorce decision procedures. They also reported on unjust resource distributions, including losses of assets that were not divided, with subsequent crises involving high debts, tax fraud, bankruptcy, and loss of custody, and the traumas of continued litigation for many years without changes granted by the appellate or state supreme courts.

In a study of nonresident US fathers who filed for divorce, perceived fairness and income withholding increased their compliance with child support obligations, but the effects of these strategies on compliance were not additive. If fathers thought their child support orders were fair, the use of routine income withholding did not increase their compliance (Lin, 2000).

An Australian study showed that the justice of postdivorce distributions impacts children and adolescents (Parkinson, Cashmore, & Single, 2005): There was a strong relation between young people's perceptions of the fairness of the parenting arrangement and the extent to which they were allowed to participate in making those arrangements. Half said that they did not have enough time with their nonresident parent. A continuing and meaningful relationship with both parents and with siblings was very important to them. More than one-third favored arrangements in which they could spend equal time with each parent. Youngsters were very concerned with issues of fairness between first and second families, in terms of both time availability and financial provisions.

Thus, the experience of injustice has been shown to severely aggravate the aftermath of divorce, fathers' compliance with child support obligations, and new family arrangements. It thus seems highly desirable to support parents and their children in the negotiation of new distributions of rights and duties that are perceived as just by every member of the family—in terms of allocation, procedure, and outcome, and, if required, in terms of retribution and restoration.

18.2.5 Distributions in Same-Sex Couples

When it comes to familial distributions in same-sex couples, the situation is different. As household chores cannot be distributed by the proxy of biological sex, they need to be negotiated. As more same-sex parents raise children, childcare has to be distributed, too.

The base rate of same-sex affection is difficult to assess. Estimates revolve around 1–3 % of homosexual individuals with 10–15 % of individuals reporting homosexual experiences. In the UK, 1.5 % of adults identified themselves as gay, lesbian, or bisexual (Office for National Statistics, 2012). Australia reported 1.6 % homosexual men, 0.9 % bisexual men, 0.8 % homosexual women, and 1.4 % bisexual women, with 8.6 % of men and 15.1 % of women having experienced sexual desire or contact with same-sex partners (Smith, Rissel, Richters, Grulich, & de Visser, 2003). In legislation, there is still a difference between the more liberal northwestern Europe and the rather strict legislation in southern

Europe, with some exceptions. Spain, for instance, is very liberal despite the great majority of Catholics. France, on the other hand, compares to Eastern European countries. To date, homosexual acts are no longer persecuted in any of the European countries. Many countries have passed antidiscrimination laws, but only three countries (i.e., Kosovo, Portugal, and Sweden) have added respective passages to their constitutions. Same-sex marriages are currently possible in seven European countries: Belgium, Iceland, The Netherlands, Norway, Portugal, Sweden, and Spain. Several other nations offer homosexual couples a civil union or civil partnership, a legal form similar but not identical to marriage. Homosexuals may adopt children in nine countries: Andorra, Belgium, Denmark, the UK, Iceland, The Netherlands, Norway, Sweden, and Spain (Bundeszentrale für Polititsche Bildung (BZPB), 2013).

Research on the division of housework between same-sex couples is fairly new. In general, the division of housework is more egalitarian than in heterosexual couples (Goldberg, Smith, & Perry-Jenkins, 2012). Lesbian mothers share household labor more equally than heterosexual mothers and report a greater preference for an equal distribution (for reviews, see Coltrane & Shih, 2010; Goldberg, 2013). Lesbian couples tend to divide household labor quite equally. In childcare, biological mothers tend to contribute more, but the majority of lesbian partners do not perceive the biological mother to be the "primary" parent (Goldberg & Perry-Jenkins, 2007).

18.3 Justice Among Kin: Siblings, Intergenerational Issues, and the Long Arm of Injustice

Intergenerational justice has been conceptualized as a form of longitudinal generalized exchange, an open-ended generalized chain: "To understand what constitutes a fair or just exchange particularly within families, we cannot just look at isolated exchange relations" (Cook & Donnelly, 1996, p. 78). Consequently, studies focusing on

intergenerational justice tend to adopt one of two strategies. The first is to cover a time span in retrospect, the approach used in most sibling studies. Alternatively, prospective and longitudinal designs are applied, with the advantage of fewer distortions by effects of motivated coping that might have transformed a severe injustice into a tolerable one.

Most sibling studies center on perceptions of unequal treatment between siblings and their effects: Using longitudinal data from middle childhood to late adolescence, Shanahan, McHale, Crouter, and Osgood (2008) reported cross-sectional and longitudinal links between differential treatment, ratings of the fairness of differential treatment, and outcomes. Youths who reported decreases in parent–child relationship warmth and differential treatment reported increases in depressive symptoms and decreases in sibling warmth. Effects were moderated by gender, age, birth order, and parent, with girls at older ages experiencing the most marked effects. Girls seemed to be more susceptible to subjectively perceived unfair treatment. Another longitudinal study (Campione-Barr, Greer, & Kruse, 2013) found that violations of fairness and equality between siblings were associated with subsequent increases in depressive mood.

In young adulthood, within-family stability in parents' differential treatment of siblings from adolescence onward revealed that the adolescent sibling who was closer to the parents went on to be the young-adult sibling who was closer to and received more material support from the parents. Differential parental financial assistance of young-adult siblings predicted worse sibling relationship quality (Siennick, 2013).

In middle adulthood, justice evaluations have been found to mediate the effects of perceived parental differential treatment (recognition, nurturance, and demands for assuming filial responsibility) on the quality of relationships with siblings and parents. Justice evaluations were even more powerful predictors of relationship quality with parents than differential treatment by parents (Boll, Ferring, & Filipp, 2005). In later life, adult children's perceptions that their fathers favored any siblings predicted reports of

tension with their siblings, even more in daughters than in sons. Perceptions of mothers' favoritism did not predict such tensions (Gilligan, Suitor, Kim, & Pillemer, 2013). Finally, when care was provided as a consequence of elderly mothers' major health events, care and perceptions of favoritism regarding future caregiving were associated with sibling tension, with even greater effects of caregiving on sibling tension when perceptions of favoritism were also present (Suitor, Gilligan, Johnson, & Pillemer, 2013). Finally, injustice in families has consequences beyond the family. Children's reports of high appraisals of procedural justice in family conflict resolutions were associated with lower frequencies of bullying by the child at school (Brubacher, Fondacaro, Brank, Brown, & Miller, 2009).

18.4 Conclusions

Injustice in its various forms, as violations of personal or legal norms of allocation, procedure, distributional outcome, retribution, and restoration, is a very powerful condition in close relationships and in the larger family context. If it cannot set right or an individual does not psychologically cope with a distortion, for example, by relative deprivation weights or other coping mechanisms, injustice can lead to dissatisfaction, health problems, marital breakup, depression in the children of unjust parents, tension between parents and their children, and finally among siblings.

On the positive side, equal shares in household chores and work–life lead to higher relationship satisfaction if the net amount of work is manageable. Otherwise, traditional distributions such as the part-time employment of the wife and mother become the first choice as the majority of husbands and fathers still feel inferior when their wives outearn them or have more employment. As same-sex couples do not have to resort to these gender role scripts, their distributions can be more flexible and egalitarian. Cultural differences in the appropriateness of justice principles are evident, but research on cultural differences is very scarce.

After a marital breakup, injustice has also been shown to impact the satisfaction of adolescents with the parenting arrangements of their divorced parents. Moreover, injustice plays a crucial role in the integration of first and second families. In order to enable families to solve these justice issues, Miller (2014) proposed the establishment of a Child Support and Visitation Enforcement Office, which would use mediation to create and enforce all aspects of the child custody agreement. German law allows judges to mandate separated parents to work with a mediator.

Injustice among kin mostly concerns unequal treatment of siblings and has been shown to harm both parent–child relationships and sibling relationships. On the positive side, constructive conflict solution practices in families are transmitted to other social contexts of children.

Many potential justice issues remain to be studied. For example, we do not know much about cultural differences—whether forced marriages, arranged marriages, or unequal dowry distributions are perceived as just or unjust procedural principles. We also do not know anything about the potential benefits of injustice regarding long-term consequences and developmental impacts (e.g., greater maturity). And finally we do not know much about the potential benefits of the experience of justice in the family—be it in the role of a child, a spouse, or a sibling, to name but a few questions for the future.

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Justice and Education

19

Nura Resh and Clara Sabbagh

Justice is a human construction, and it is doubtful that it can be made in only one way.

Walzer (1983, p. 5)

19.1 Introduction

The just distribution by and within institutions of scarce resources, including money, influence, jobs, status, and in-kind benefits, has been the subject of a large body of literature across the social sciences.[1] However, despite the important role of justice in formal educational settings, such as schools, less systematic attention has been paid to the examination of such justice perceptions and their attitudinal, emotional, and behavioral consequences among students and teachers (Deutsch, 1979; Sabbagh, Resh, Mor, & Vanhuysse, 2006).

Walzer (1983), in his highly influential *Spheres of Justice*, stressed the importance of examining education as a distinct distributive sphere, whereby various valued social resources are distributed according to distinct principles or "distributive patterns." Following this line of

thought, we identify different classes of resources and their underlying distribution principles *within* this sphere. This is of importance because educational settings, which clearly constitute various arenas of resource distribution, play a primary distributive role in assigning students to schools and, within schools, to tracks and ability groups, and because teachers distribute not only knowledge and grades, but also attention, learning help, care, and respect. In so doing, they provide differential learning opportunities and socialization experiences that affect students' motivation, academic achievements, subsequent educational careers and, ultimately, occupational positions and life chances (e.g., Bills & Wacker, 2003; Hurn, 1985; Oakes, Gamoran, & Page, 1992).

The question of who will receive what kind of educational resources, based on which principles, is therefore crucial to a wide range of factors that affect the socioeconomic welfare of citizens virtually across the life cycle (Connell, 1993). This question is all the more important since the educational literature typically frames distributional issues less in terms of justice than in terms of effectiveness, such as didactic fit, adjustment of learning pace, and academic achievement. Moreover, educational practices depend on resources—public and/or private—allocated based on policy decisions (national, local, etc.) regarding who ought to get what and according to which principles.

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[1] For empirical and theoretical overviews, see other chapters in this Handbook.

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In order to provide a comprehensive overview of educational settings as a "sphere of justice," the following thematic review will cover five educational distribution subspheres of justice. Moving from the macro- to micro-educational spheres, we focus on the distribution of: (a) right to education, including resource allocation to realize this right; (b) educational places (student composition; selection to classes, tracks, ability-based learning groups); (c) pedagogy; (d) grading; and (e) teacher–student relations (help, respect, attention, care).

In reviewing the justice-related research that has been accumulated on these subspheres, we are guided by three interrelated central questions that have been posed in the study of justice (Jasso, 1989). The first asks "*What do individuals and collectivities think is just*?" (Jasso, 1989, p. 354). In other words, it encompasses the identification of principles and their more specific rules that "ought" to regulate the distribution of societal resources ("goods" and "bads") to individuals or groups. In the sphere of education, for example, one can ask about the justice principle (or combination of principles) that ought to guide resource allocation to schools or grade allocation by teachers. Justice research has identified three archetypal justice principles and their correspondent, more specific rules, which determine the "just" values underlying the distribution of various kinds of resources in a given setting (Deutsch, 1985; Leventhal, 1980): equality (to each according to arithmetic equality, or equal opportunities); need (to each according to their needs); and equity (to each according to their effort, contribution, ability, and outcomes).

The second question in the study of justice (Jasso, 1989) states: "*What is the magnitude of the perceived injustice associated with given departures from perfect justice*?" (p. 354). This question assumes that people strive to get what they (think they) deserve. Specifically, it states that the magnitude of injustice is a function of people's comparison of their *actual* rewards (e.g., income) with given principle(s) perceived as *just*. When the actual pattern of distribution fits the just one, based on the perceived justice principles and rules, a sense of justice is likely to emerge, which in turn may increase the subject's satisfaction, efficacy, and commitment to others. Conversely, when there is a gap between actual and just patterns of distribution, individuals (or groups) will sense injustice (Jasso, 1980), which may lead to feelings of anger, moral outrage and, eventually, asocial behavior, alienation, and protest (e.g., Gurr, 1971). Thus, the (un)just distribution of educational resources is likely to affect students' learning motivation and well-being (Dalbert & Maes, 2002) and to shape their "social maps" and worldviews regarding a just or unjust society (Dar, Erhard, & Resh, 1998).

Finally, the third central question in justice research asks: "*What are the behavioral and social consequences of perceived injustice*?" (Jasso, 1989, p. 354). Namely, the focus is on the consequences of potential gaps between perceived justice and actual allocations in the daily educational practices. In considering this question, we also relate to antecedents of the sense of justice whenever they are revealed in empirical studies.

This thematic review provides a synthesis and systematic discussion of the empirical knowledge that has accumulated over the past few decades in somewhat scattered fashion across several subdisciplines. We argue that everyday educational practices in school can be framed in distributive terms that entail conceptions of justice. As mentioned earlier, we review the literature related to the specific principles and rules that are perceived as just in the distribution of these resources, the practices used in their actual allocation, and the antecedents and consequences of sense of justice/injustice about distribution in each of these subcategories. It should be noted, however, that this general three-layered structure is mainly analytical. In fact, in some educational subspheres we could not apply it consistently due to different constrains such as lack of relevance (e.g., consequences with respect to the right of education) and the way that justice is being conceived (e.g., socially just pedagogies).

19.2   The Right to Education

The education of younger generations expresses society's deepest search for continuity over time (Hurn, 1985; Walzer, 1983). The institutionalization of formal education and its transformation to a citizen right and communal obligation has been historically embedded in the development of the modern nation-state. Once the economic infrastructure had developed outside the family, children's training was turned over to the public educational system (Coleman, 1968). This system, consolidated in the nineteenth century, was based upon distinctly liberal and egalitarian ideals (Rawls, 1971).

Public "education for all," carried out by teachers in schools, requires resources: physical (buildings, equipment, and teaching materials) and human (teachers, administrators, and other school staff). These resources are provided to schools, their direct recipients, and transformed to qualities of education, such as more or less professional teachers, richer or poorer equipment, or physical environment. Via these qualities the students become the central recipients of the allocated resources.

19.2.1 *Just* Distribution of Access and Resource Allocation

Guided by the overarching ethos of Equality of Educational Opportunity (EEO), these ideals held that the right to an education ought to be equally granted to all children, regardless of their family origin or other inborn attributes, like nationality, ethnicity, socioeconomic status, religion, and gender. The EEO ethos reflects the strong belief that the "common school" will serve as "the great equalizer": because of schooling, ability and effort will triumph over initial differential circumstances. Students willing to work hard and take advantage of the "equal opportunity" will have the chance to succeed and fulfill their academic potential. Thus, equality of access to education and equity in the learning process within the school will eventually eliminate, or at least reduce, the relationship between student ori-

gin, socioeconomic or racial/ethnic origin, and the individual's educational outcomes (Coleman, 1968; Howe, 1997; Schmidt, Cogan, & McKnight, 2011). This liberal egalitarian ideal of education has been differentially implemented across social and historical contexts (Vanhuysse & Sabbagh, 2004). It is worth noting that even the seemingly simple definition of "equal access" has undergone a number of changes over time, extended to the secondary level and widened in scope to include various groups that were not previously part of "education for all," such as women in higher education, children of various races, noncitizens, the handicapped, and individuals with special needs (Hallinan, 1992).

With regard to resource allocation to schools, the interpretation of EEO has undergone radical revisions that reflect changing perceptions of what constitutes "equal opportunity"—from the classic liberal and more simplistic idea of equality of input to a focus on equal output. The former suggests that equality is the principle of resource distribution, while the latter emphasizes the differential starting point of students and the *need* to "compensate" weaker-disadvantaged social groups for past and current unjust discrimination, in order to provide a "real" equal opportunity for equal outcomes (Coleman, 1968; Kellough, 2005).

This latter interpretation, based on the *need* principle, is reflected in the implementation of affirmative action policy, that is, the allocation of extra resources to disadvantaged populations with the aim of achieving greater equality of academic outcomes (e.g., Blanchard & Crosby, 1989; Kellough, 2005; Walton, Spencer, & Erman, 2013).[2] Policies of affirmative action have been adopted by many national systems

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[2] Both educational equal opportunity and the policy of affirmative action (also termed "positive discrimination") have been the focus of academic, public, and political discussions of pros and cons. These debates are accompanied by an abundance of publications and, in some cases, have become a judicial issue related to questions of discrimination and deprivation not only in education, but also in other areas of life, especially the occupational sphere. Here, we very generally outline these notions and their implementation in the just distribution of resources to schools.

(also in other spheres of life) and have given rise to abundant intervention programs targeted at entitled disadvantaged groups (Kellough, 2005; Sowell, 2004). These policies have also raised questions about implementation, such as: Who is defined as the individual or group entitled to the benefits? How can we ensure the distribution of benefits reaches those who are entitled to it equally?

Concomitantly, reflecting unease with the simplistic interpretation of equal opportunity, an elaborate discourse has developed around the interpretation of "equal access." Connell (1993) argues that it should be conceived not only as the right to school participation per se, but also as the assurance of meaningful participation, including attention to appropriate curricula:

> Justice cannot be achieved by distributing the same amount of a standard good to children of all social classes. Education is a process operating through relationships, which *cannot* be neutralized or obliterated to allow equal distribution of the social good at their core. That "good" means different things to ruling-class and working-class children, and will do different things for them (or to them) (Connell, 1993, p. 19).

In this understanding, liberal-egalitarian theories of justice provide only a partial answer to the distribution of the right to education. Instead, Connell (1993) proposes a notion of "curricular justice" based in part on Rawls' (1971) classic argument that the distribution of socioeconomic resources should maximize the benefits of society's least advantaged groups. Connell claims that since the hegemonic curriculum in education is often based on the interests of the advantaged, true justice demands a counter-hegemonic curriculum that advances the interests of the less advantaged. Schools should therefore embody compensatory educational programs, multicultural inclusion, special programs for girls, and so on. These counter-hegemonic programs must also guarantee that all students have access to conventional scientific methods and findings.

Accordingly, a second principle of "participation and common schooling" should emphasize the provision of basic skills and knowledge by means of a common curriculum, ruling out selection, ability groupings, streaming, or any other mechanism of differentiation (see below the section on "places of education"). This core curriculum is aimed at preparing students to become democratic citizens, participating in "collective decision making on major issues in which all citizens have, in principle, an equal voice" (Connell, 1993, p. 45). In sum, like the shift from equal input in resource allocation to unequal input (affirmative action), Connell's theory of "curricular justice" usefully broadens the notion of equal access by emphasizing "difference" as a condition to achieve social justice (see also McDonough & Feinberg, 2003).

19.2.2 *Actual* Distribution of Access and Resource Allocation

As mentioned, the universal trend of greater equality in educational access is reflected in full participation of the nations' young at the different levels of schooling (elementary and secondary) and a more inclusive participation of groups that were not previously entitled. While access to higher education is mostly regulated by the equity principle (selective access based on meritocratic characteristics), the policy of affirmative action (open access to discriminated groups) has also been implemented in some countries at times (e.g., the U.S.). However, if just distribution of access is to be interpreted according to Connell's "curricular justice" meaning, the widespread practice of tracking and ability grouping seems to run counter to the call to refrain from mechanisms of selective differentiation within school. We touch upon this issue in the next section on the actual distribution of learning places.

What do we know about the actual distribution of school resources? In his much-cited investigation, known as the Coleman Report, Coleman et al. (1966), found, to the surprise of many, that material investment (buildings and educational equipment, like libraries, laboratories, and sport's equipment) did not vary significantly between schools (across the U.S.). However, this is a somewhat limited definition of school resources, which also encompass a

wide range of inputs beyond buildings and equipment, such as curriculum, learning materials, informal enrichment, class size (or teacher–student ratio), and quality of teachers and other school staff. In general, there is much evidence that the more affluent (socioeconomically and ethnically), who usually also live in more affluent districts and communities, are getting a greater share of school resources of various kinds (e.g., Betts, Reuben, & Danenberg, 2000; Gamoran & Long, 2007; Kozol, 1991; Raudenbush, Fotiu, & Cheong, 1998; Schmidt et al., 2011). This disparity in resource allocation is exacerbated by the implementation of "free market" policies like school choice and privatization of resource contribution, where the stronger social groups usually win the competition (e.g., Gamoran & Long, 2007; Witte, 2000).

The teaching staff, or rather the "quality of teachers," is probably the most significant of the various school resources that affect students' educational outcomes. Thus, in examining the actual distribution of school resources, we focus on teachers as a distributed "good." Despite lack of consensus as to the definition of a "qualified teacher," there is empirical support for the connection between teachers' qualifications (teaching ability and academic knowledge, subject matter expertise, teaching certificate, experience, pedagogy, and the like) and their students' learning and academic progress, self-image, motivation, and attitudes (Darling-Hammond, 2000, 2004; Hanushek, Kain, & Rivkin, 2004; Ingersol, 2005; Raudenbush, Fotiu, & Cheong, 1999). Thus, one would expect teacher quality to be equally distributed in schools in various districts and communities across the educational system. In this regard, abundant empirical evidence about the actual distribution of teachers in schools shows clearly that even the modest just principle of equal distribution is not applied in reality. Rather, students of low-SES and lower-track classes have a much greater chance of being taught by less qualified teachers. Moreover, schools in disadvantaged areas are more likely to have a higher concentration of underqualified teachers and to suffer greater teacher turn-over, which increases the rate of out-of-field and less experienced teachers in the school (Darling-Hammond, 2004; Ingersol, 2005).

In sum, EEO, initially perceived as entitlement to equal access to education and equal resource inputs to schools, has attracted great public and academic attention. The more sophisticated perception of meaningful equal access and equality in resource distribution, that has since evolved, reflects a shift to a focus on the right (just) access and resource distribution that ought to be practiced so as to ensure equal opportunity for outcomes to discriminated against (in the past and present) social groups, which should be compensated through affirmative action policies. The actual distribution of opportunities seems to meet the expectation of equal access to school in its straightforward interpretation, but not the perceived just expectation of both access to resources.

19.3 Allocation of Learning Places

In principle, "right to education," the provision of equal (or unequal) access to school, and "allocation of learning places," have a common feature: the determination whether and where will a child receive the educational "goods." However, the first—access to schooling—is usually a central policy decision. The second, allocation of learning places, although dependent on the system's policy, is much more an autonomous (for districts and individual school decision) type of distribution, that is carried out *within* schools by principals, counselors, and/or teachers (see the notion of "local justice" by Elster, 1992).

The structural organization of learning, whereby students are assigned to different institutions, tracks, or ability groups, regulates the distribution of learning opportunities, that is, access to knowledge, the amount and content of intended curriculum presented to students, the expected credentials, and other contextual classroom factors resulting from their differential student compositions and the often accompanying differentiation in quality of allocated teachers (Cohen, 2000, p. 266). It is worth noting that,

since the number of learning places in any kind of learning group is limited and indivisible, the distribution of learning places takes place under conditions of competition. When applicants outnumber the vacancies in a school or higher education institution, "tragic choices" must be made (Calabresi & Bobbit, 1978) which are tempered, as shown below, by principles of justice.

The structural organization of learning, implemented at various transition points in the schooling process, is of crucial importance to students because it implies the acquisition of differential societal credentials, which are then converted into valuable assets in the labor market (Reisel, 2011). From society's point of view, this practice is justified as a functional means of increasing societal efficiency by means of proper selection and regulation of societal resources (Ansalone, 2004; Hurn, 1985). From a pedagogical point of view, the structural organization of learning is said to increase academic achievement, as it ensures didactic fit in the teaching–learning process, matching level, pace and method of teaching to students' ability, and caters to students' needs and interests by adjusting their content of learning (Hallinan, 1992).

19.3.1 The Just Distribution of Learning Places

The distribution of learning places, which has short and long implications for students, also involves a frame of justice that specifies the distribution principles and rules that ought to guide a just educational selective process (i.e., the first question in justice research). They answer such questions as: How should students be assigned to ability groups and tracks, and to university departments?

While the call for greater inclusiveness in schools and universities rests on the principle of equality, selection and admission practices are commonly conceived as guided by the rules of meritocracy, that is, equity-based interpretations of equal opportunity, which justify inequality on the basis of effort, academic achievement, and ability (Arrow, Bowles, & Durlauf, 2000). In any

event, deviation from meritocratic considerations that benefit students from strong backgrounds on the basis of their ascriptive characteristics, such as gender, socioeconomic status, race, and ethnic origin, is usually considered unfair.

Even though the allocation of learning places is guided by the above considerations of meritocratic justice, there is some cultural variation across types of educational institutions and countries when considering the "just" distribution rule (Reisel, 2011). For example, while selection in U.S. primary and secondary education (tracks and within-class ability groups) stresses ability (i.e., standardized test scores and IQ scores), which is a highly differentiating rule, the Japanese educational system emphasizes less differentiating rules, such as students' effort and hard work (Ansalone, 2004; Sabbagh, 2003).

19.3.2 The Actual Distribution of Learning Places

To what extent do these ideals of justice fit the actual distribution of learning places? Divergence in this respect is likely to be indicative of injustice (i.e., the second question in justice research). Most studies that have examined actual distribution of learning places agree that meritocratic justice rules, such as academic achievement and ability, are most salient in determining assignment to schools and to higher education. Some studies support the claim of "just" placement based on ability and achievement alone (Alexander & Cook, 1982; Murphy & Hallinger, 1989).

However, it has also been suggested that, beyond meritocratic considerations, girls have a better chance than boys of being placed in higher ability grouping (Jones, Vanfossen, & Ensminger, 1995) and in the more promising academic tracks in high school (Resh, 1998), although this trend varies across nations (Ayalon, 1995) and is dependent upon the disposition of girls to display an incentive to attain college credentials (Reisel, 2011). Moreover, students of affluent background and hegemonic race or ethnic origin have a better chance of being placed in higher or more prestigious learning groups (e.g., Gamoran, 1992;

Schuman, 2001; Vanfossen, Jones, & Spade, 1987). It is worth noting that, even when objective barriers are reduced, this type of inequality is augmented by the choice of students from disadvantaged sectors not to pursue further education (Reisel, 2011).

A few words are in order about the central figures (i.e., counselors and admission officers) who serve as "gatekeepers" of the educational stratification system, whereby decisions about students' placement in ability groups, classes, and tracks, as well as university admissions, are determined (Cicourel & Kitsuse, 1963; Yogev & Roditi, 1987). In their study of the rules that affect counselors' considerations when they assign students to junior high schools, Yogev and Roditi (1987) found that meritocratic considerations were less determinant for disadvantaged than affluent students, and that there was a direct effect of students' ethnic characteristics on school assignment in the case of disadvantaged students. Similarly, Resh and Erhard (2002) found that school counselors are more likely to convey "cooling-out" messages to lower class and "weak" students.[3]

At the university level, selection is usually carried out by mechanistic and/or discretionary procedures. That is, admissions are determined automatically by standardized criteria (quantitative data in the form of ability test or governmental exit exams at the end of high school) and/or by discretionary procedures focusing on qualitative criteria, such as interviews, evaluation of essays, and recommendations.

In a study of self-reported beliefs by admission officers at high-prestige private universities in the U.S. about the allocation of study places, Conley (1996) found that while meritocratic criteria had a large influence on admission decisions, officers were also "biased" in that they preferred candidates from disadvantaged groups, such as women, blacks, and Hispanics, perhaps the result of political pressures in favor of affirmative action. A later study by Espenshade, Hale, and Chung (2005), which also focused on admis-

sion criteria (as reflected in the decisions of admission officers) in highly selective private research universities, examined the contextual role of school effects, such as the academic quality of schools and their student bodies, in predicting admission to elite colleges. Based on social comparison and relative deprivation theories, the authors bring empirical support of a "frog pond" hypothesis, whereby the chances of being accepted to an elite college are greater if a student is strongest in a less prestigious high school, as opposed to an average student in an outstanding high school (measured by high school class ranks) (see also Marsh & Hau, 2003). At the same time, and similar to Conley's findings, they show that meritocratic attributes of individual students (e.g., standardized GPAs, SAT scores, and various Advanced Placement (AP) examinations) are the strongest predictors of college admission. Affirmative action also appears to be applied to some degree, and nonacademic criteria still play a role in selection: admission was predicted by being a woman, black, or Hispanic (the "need" principle), while there was also preferential treatment of private school graduates, athletes, and children of alumni.

19.3.3 Distributional Consequences of the Structural Organization of Learning

We now focus on the consequences of the distribution of learning, that is, the extent to which organizational and curricular differentiation, through a better didactic fit, contributes to equality of outcomes (i.e., academic achievement) and to a just distribution of further educational (and occupational) chances. The didactic fit argument that usually justifies tracking and ability grouping is countered by those who argue that such practices differentiate socio-learning environments (Dar & Resh, 1997) and curriculum (Oakes et al., 1992), affecting students' opportunities to learn and their future prospects (Dougherty, 1996).

Abundant research on the scholastic and affective impact of ability grouping and tracking often indicates opposite effects to those expected.

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[3] "Cooling out" messages are among the functions of hidden curriculum, where unpromising students' high expectations are discouraged and geared toward more realistic alternatives in their educational career trajectory (see, Clark, 1960).

Learning in a "high level" group or track has an independent positive effect on students' academic outcomes, academic image, and educational aspirations, while placement in a "low level" group or track almost consistently yields a negative effect (e.g., Oakes et al., 1992; Slavin, 1990). Moreover, research has indicated that curricular differentiation benefits students from advantaged backgrounds but lowers the motivation and intellectual stimulation of disadvantaged students (Cohen, 2000; Dar & Resh, 1997). Note that although tracking is pervasive in the educational structure of many countries, evidence fails to support the claim that it furthers academic achievement (Gamoran & Long, 2006). Rather, tracking and ability grouping are often perceived as mechanisms for perpetuating social and cultural inequality because, through exposure to different types of curricula, they in fact imply segregation along lines of class, ethnicity, and gender (Cohen, 2000).

In other words, the distribution practices embedded in the structural organization of learning contribute to a widening rather than a narrowing of educational gaps, contrary to standard "equal opportunity" claims. The evidence on the effect of ascriptive factors, such as socioeconomic status, race, and gender, on the process of selection and placement in schools and classes (tracks and ability groups), combined with the depressing academic effect of being placed in a low group or track, suggests that the practice of curricular and organizational differentiation does not enhance "equal opportunity-to-learn" conditions.

In sum, the just allocation of learning places is meant to further an egalitarian notion of justice, whereby "any given disadvantaged groups has progressed in accessing a hitherto inaccessible educational good" (Lynch, 2000, p. 93). Put differently, it is meant to alter the nature of the relationship between social origins and educational achievement (Breen, Luijkx, Mueller, & Pollak, 2009; Shavit, 1993). However, as shown here, the actual allocation of learning places often diverges from these justice ideals, reproducing (unjust) existent inequality structures.

19.4 Pedagogical Practices

Pedagogical practices, the interrelated aspects of teaching and learning, can be generally defined as the ways in which teachers choose to encourage learning, that is, to promote knowledge acquisition and intellectual and personal development, as the basic preconditions for future successful performance in society (Parsons, 1959b). Since pedagogical practices affect students' opportunities to learn, questions arise as to their just distribution (Dougherty, 1996).

The justice of pedagogical practices has been conceptualized in terms of two distinct though coexisting facets. One identifies the kind of distribution rules that should be (or actually are) applied in pedagogical practices and whether these practices are perceived as just (i.e., the first basic question of justice research). This facet, which has received relatively little scholarly attention, deals with the (just) normative design of pedagogical practices and their implementation. The second facet, which has been the focus of more recent research, specifies the extent to which pedagogical practices promote social justice—the extent that these practices bring about societal conditions that can be considered just (i.e., the third basic question of justice research). Even though the discussion on this second facet diverges to some extent from the general three-layered structure of our chapter (i.e., just distribution rules, actual practices, and consequences), we include it in this chapter's review because it has been very predominant in the educational discourse of justice in education.

19.4.1 Just Pedagogical Practices

The work by Thorkildsen (1989a, 1989b) stands out in its attempt to identify classroom practices and their underlying distribution rules, as well as the extent to which these practices are perceived as just and guide actual classroom learning. In her pioneering study, Thorkildsen (1989a) examined students' perceptions of justice with regard

to five classroom practices frequently used by teachers in heterogeneous classrooms: "acceleration"—each student progresses at his/her own rate, based on capability (i.e., fits the equity rule); "fast worker sit and wait"—fast learners do not advance until slow learners have finished the task (fits the equality rule); "peer-tutoring"—after fast learners finish a given task, they help slow learners (fits both equality and need rules); "enrichment"—after fast learners finish their task, they enrich themselves through other activities (fits equity rules, though this is more egalitarian than acceleration); and "all move on, slow ones never finish"—fast learners advance with no regard for slow ones (fits a Machiavellian rule). She found that slow and fast learners alike, across age groups, believed the practice of "peer-tutoring" to be the most just and "all move on, slow ones never finish" to be the least just (see also Thorkildsen, 1993).

Actual Pedagogies

When asked to state what practices their teachers actually use at school, most students claimed the practice of "enrichment" to be most frequent, which points to a possible source of sense of injustice in schools. Interestingly, students in upper grades favored the practice of "acceleration" (which fits equity rules) more strongly that those in lower grades (Thorkildsen, 1989a, 1989b). To the best our knowledge, the study of consequences of these pedagogies is nonexistent.

19.4.2 Socially Just Pedagogies

The studies presented earlier mainly emphasize the *distributional* aspects of classroom practices. Recent research, however, points to a variety of socially just pedagogies—known also as "critical pedagogy," "authentic pedagogy," "productive pedagogy," "creative pedagogy," and "transformative pedagogy"—which are meant to promote social justice, and, at the same time, effectively advance learning, especially among disadvantaged students. As suggested earlier, the aim of

this sort of educational practice reflects "not simply the ability of people to learn, the utility of obtaining an education, but locating learning and its outcomes in a structure of justice that extends to life within complex societies" (Budd, 2013, p. 18). In this understanding, teachers are perceived as playing an active role in promoting social justice by allowing both educational opportunity and a "transformative educational policy" that involves "equally inspiring, enlightening, liberating and knowledge producing for students from disadvantaged background as it is for those who are more privileged" (Lupton & Hempel-Jorgensen, 2012, p. 602).

"Critical pedagogy" and the seminal work of Freire (1970) can be regarded as one of the most influential educational practices that has attempted to teach social justice. This pedagogy, which has inspired many scholars in education (e.g., Giroux, 1988; McLaren, 1989), challenges existent societal structures of oppression (e.g., race, ethnic origin) and instead envisions a society based on egalitarian humane democratic values. In order to achieve this goal, classroom hierarchies are broken down (Lawson, Boyask, & Waite, 2013), and both students and teachers are placed in agency positions which are meant to affect change. Specifically, rather than delivering a body of knowledge to a group of passive students, the teachers' role is to empower them through considering their experiences and developing an awareness of social problems that characterize the social historical and political reality in which they live. In this understanding, responsibility for social inequalities is attributed to the very basic structure of society, rather than to difference (i.e., multicultural diversity), or to individual attributes and prejudice (e.g., laziness).

Later, Newmann, Marks, and Gamoran (1996) and Newmann and Wehlage (1993) developed the notion of "authentic pedagogy" in the United States (for an application to the Netherlands, see Roelofs & Terwel, 1999). This multifaceted construct specifies three main criteria for teaching and evaluation practices: "construction of knowledge," that is, students' capacity to analyze and interpret knowledge rather than simply reproduce

it; "disciplined inquiry," where students are asked to investigate and understand in depth the topics at hand, using elaborated communication; and "values knowledge beyond school," whereby students are required to make connections between substantive knowledge and public problems or their personal experiences.

"Productive pedagogies"—a related model developed by Gore (2001), Ladwig (1998), and by Lingard, Hayes, and Mills (2003) in the framework of a school reform in Queensland, Australia—builds upon authentic pedagogy research, extending considerations to social and intellectual outcomes of schooling. This model includes two additional criteria which emphasize the furthering of social outcomes (e.g., active citizenship and justice), especially among students from traditionally underachieving backgrounds (Lingard et al., 2003). One criterion is "socially supportive" classroom environments, in which students are able to influence activities and to self-regulate their behavior. The other is "recognition of difference," which is of special importance to issues of justice, as it explicitly strives to include and reinforce the identity of nondominant groups, such as people of color, women, and homosexuals.

In sum, the socially just pedagogies presented earlier focus on the social outcomes of educational practices, whereby different forms of social justice are promoted, such as the recognition of "difference," defined along religious, cultural, and socioeconomic lines (Bhopal, 2012; Connell, 1993; Lawson et al., 2013); the empowerment of socially weak groups (Freire, 1970); overcoming discrimination of social, religious groups (e.g., Bhopal, 2012); and the general furthering of equality in the wider society.

Notwithstanding the variety of their aims, socially just pedagogies share a number of attributes. First, they all encompass a critical view of normative schooling and the societal arrangements that support it. Specifically, they contend that, rather than furthering students' agency toward social change, normative schooling adopts an instrumental and technical approach to learning that hinders such agency (Ritchie, 2012). These "performative mode" pressures (Bernstein,

1996) involve the teacher's tendency to strongly control what is taught, with students expected to respond in a prescribed way and according to external systems of reward and punishment (Lupton & Hempel-Jorgensen, 2012).

Second, in sharp contrast to these pressures, socially just pedagogies advocate empowerment of teachers and students alike by granting all a high degree of agency and autonomy. It is worth noting, however, that the element of autonomy is not exclusive to this type of pedagogy (see, e.g., the "competence mode" by Bernstein 1996; Lupton & Hempel-Jorgensen, 2012). What makes it unique is that in socially just pedagogies, the autonomy afforded to teachers and students allows them to become activists and advocates of social justice (Cochran-Smith, 2004; Zeichner, 2009). Specifically, students—especially those of deprived backgrounds—are conceived as capable of undergoing a transformation in terms of learning through "problematising, questioning and rethinking" (Lawson et al., 2013, p. 107) and through engaging in voluntary activities. Moreover, teachers are expected to apply their expertise and ability rather than being handled by external constraints and resources (Lupton & Hempel-Jorgensen, 2012). One means of achieving this has been to create common informal social networks of teachers in which they support each other and share ideas around social justice (Ritchie, 2012).

Finally, socially just pedagogies stress the furthering of communal relationships between students and teachers on the basis of trust. That is, in addition to developing an intellectual culture in the classroom, teachers are expected to create a relation with students in their own environment, outside of schools (Lingard et al., 2003). This is attained by engaging marginalized students in schooling, thereby contributing to more equal outcomes from formal education, as well as by implementing democratic and inclusive pedagogies (Floriana & Black-Hawkinsb, 2011).

"Actual" Socially Just Pedagogies and Their Consequences

Drawing on this general vision of the socially just pedagogies, Cammarota and Romero (2010)

examined a recent socially just pedagogy labeled the Social Justice Education Project (SJEP). This project developed a scheme of participatory action research (PAR) for "oppressed" Latino high school students, which is meant to invoke "critical reflection and action." This is achieved by generating poetry themes about everyday social, cultural, and learning practices in students' lives (e.g., immigration policies and discrimination against Latinos), and then examining these themes through ethnographic research methodology (e.g., observation, video documentation, photography, interviews) with the aim of using this knowledge to assess and address their injustice experiences. That is, PAR is meant to provide students with the opportunity to, first, develop a critical analysis of the socioeconomic problems (conditions) characterizing their own families and communities and, then, initiate social change that leads to greater "social justice"—which, in this context, means "achieving an egalitarian world with safe, vibrant neighborhoods, that support healthy, positive young identities" (Cammarota & Romero, 2010, p. 490). Thus, students are conceived as agents of social change and social justice, stakeholders who are empowered to affect educational policies and practices that lead to social justice.

19.5 Grading

Evaluating student performance is an integral and central part of the teaching–learning process. The most salient method of evaluation in schools is standardized grading within classrooms, placing students on a hierarchical scale according to their academic success.

Grades have manifold instrumental and psychosocial effects (Deutsch, 1979; Jasso & Resh, 2002; Nisan, 1985), and are thus considered a highly valued, wanted reward (Green, Johnson, Kim, & Pope, 2007). They serve as "gatekeepers," providing or withholding access to classes, ability groups, and tracks (Resh, 1998), and they serve as a shortcut signal of human capital to employers, thus affecting earnings (Miller, 1998). They provide feedback about students' worth,

affecting their self-image and motivation, as well as their parents' expectations; and they may also affect the student's social status and popularity in class. Grading practices also have a latent function, inculcating important values and norms of behavior that prevail in the wider society (Deutsch, 1979; Dreeben, 1968).

19.5.1 The Just Distribution of Grades

By definition, grades are allocated differentially and their distribution is mainly guided by rules of meritocracy (rules that stress personal achievement), rather than by ascription (in-born characteristics, such as gender or race) or particularistic rules (personal relations with the teacher, kinship ties, and the like) (Hurn, 1985; Parsons, 1959a). However, when considering how grades should be allocated, teachers and students alike tend to combine, in some weighted fashion, various equitarian considerations, such as talent, actual performance (success in tests), invested effort and class learning behavior, as well as the principle of need (students' need of encouragement) (Nisan, 1985; Resh, 2009). When high school teachers in Israel were asked to assign weight to each of the above five factors, very few concentrated on one or two considerations only. On the average, they suggested that performance (success in tests) should receive about 60 % of the weight in the final grade, while effort and class learning behavior should receive about 19 % and 6 %, respectively (Resh, 2009).

A comparison of the perspectives of high school students and their teachers showed that, while the basic trend is similar, students assign lower weight to performance (about 50 %), about the same weight to effort (19 %) and greater weight to class learning behavior (14 %) (Resh, 2009). Berti, Molinari, and Speltini (2010) who compared teachers' and students' ideas on the just distribution of resources (including grades), found that students, especially girls, emphasized the equality principle, while teachers were more inclined to favor differentiating principles (effort and need).

Teachers' grade distributions may not be applied universally, but rather may vary under different conditions, related to the student's capacity or the subject matter. For example, Resh (2009) found that about half of the high school teachers thought that the grading of "weak" and "strong" students should be differentiated, ascribing greater weight to effort and need when grading the "weak" ones (see also Resh, 2010). Moreover, science teachers seem less performance driven than their math teachers' colleagues; they gave greater weight to effort and need in grade allocation, and this tendency was accentuated when grading (differentially) the weaker students (Resh, 2009). This difference between disciplines has been explained by teachers' perception of their subject matter as open/flexible vs. closed/hierarchical (Biberman-Shalev, Sabbagh, Resh, & Kramarski, 2011), the tendency to use progressive or conservative pedagogies, and teacher's self-efficacy. Finally, grading practices may vary across sociocultural contexts. A study of Israeli junior high school students (Sabbagh, Faher-Aladeen, & Resh, 2004) found that Jewish students who live in a market-driven context characterized by individual and competitive relations ascribe more importance to meritocratic rules. In contrast, Druze students, who live in relatively homogenous, more traditional communities based on ascriptive status and solidarity relations, have a greater tendency to believe grading should be guided by particularistic or ascriptive types of rules.

In a somewhat different fashion, Dalbert, Schneidewind, and Saalbach (2007) looked at three types of evaluation—criterion reference (grading by universal academic standards), norm reference (grading in comparison to classmates), and personal (grading a student's own progress, in comparison to self). They found that students, regardless of SES group or grade level (age), perceived criterion reference as the most just method and norm reference as the least.

19.5.2 The Actual Distribution of Grades and Sense of (In)justice

Evidence on actual grades usually comes from student responses. There are virtually systematic findings of a gender effect: girls get better grades than boys, and the latter expectedly feel more deprived (e.g., Dalbert & Maes, 2002; Jasso & Resh, 2002; Resh & Dalbert, 2007, in the U.S., Israel, and Germany). On the whole, a sizeable portion of students seem to experience injustice in reward distribution in schools, both in grade allocations and in teacher–student relations (see below), suggesting that schools are a meaningful source of injustice experiences for students. The few studies that have examined the possibility of sense of injustice in grades being related to SES or ethnic origin found it to be about equally spread among students from each social/ethnic background (Gogard, 2012; Resh & Dalbert, 2007).

19.5.3 Consequences

Although discussion about the significance of sense of justice in school, in general, and about grades, in particular, emphasizes its expected short- and long-term effects on outcomes, only recently do we find studies which specifically investigate this issue. Some of these combine sense of justice about grades with sense of justice about teachers' treatment in the same measure. Berti et al. (2010) suggest that perceived (in)justice in school affects identification with the school and class and dialog with teachers. Peter and Dalbert (2010) found the BJW (Belief in a Just World) effect on perceived school climate to be mediated by justice experiences with teachers (including experience in grading). Gorard's (2012) international study revealed justice experiences to be the strongest variable affecting perception of the school as a fair place, trust in teachers and in people in general, and a readiness to support special attention and help for weaker

students. Recent research on sense of justice and civic socialization suggests that sense of justice about grades affects democratic attitudes (especially with regard to human rights) (Resh & Sabbagh, 2014a), sense of belonging to school (Resh & Sabbagh, 2013), and behavior at school (dishonesty and violence) (Resh & Sabbagh, 2014b).

19.6 Teacher–Student Relations

In the process of teaching–learning, teachers distribute a wide range of relational rewards to their students, including attention, help in response to students' needs, reactions to nonroutine events (distractions, class fights), encouragement (or disapproval), respect and affection.[4] Just as teachers have the authority to define standards of learning demands and bestow grades in accordance with students' academic achievements, they also define appropriate class-behavior norms, and they have the authority to set up positive and negative relational rewards (or sanctions) accordingly (Weiner, 2003).

19.6.1 Just Teachers–Students Relation

The appropriate norms that underlie the distribution of these goods (attention, help, respect, affection) are not unequivocal (see Jencks, 1988). For example, teachers (and probably students) may find it justifiable to assign high grades to the most talented or successful students (equity) (or more severe punishment to the more violent stu-

dents), but less justifiable to give them more attention, which they think ought to be distributed more equally—or even according to the need principle, that is, offer more of it to weaker students. An international study that compared sense of fairness in school in 14 countries found students' perceptions of a just distribution of these rewards to be quite similar across countries: differential allocation of grades and punishments (equity principle) and equality in the distribution of respect and other relational rewards (Gogard, 2012).

Thorkildsen, Nolen, and Fournier (1994) examined students' fairness perceptions of the practices teachers use to enhance learning motivation. Most respondents, aged 7–12, perceived motivation practices that stress praise for excellent performance as unfair, because they harm those who are not praised and provide them with no direction for future learning. The practices considered the most fair were those that foster motivation among all students, by reinforcing tasks that are well done and by encouraging "fast learners" to attack more challenging problems and "slow learners" to try out new ideas on how they can improve. Different types of distribution rules underlie these two practices: the former is guided by a rule of equity (i.e., reward according to achievement), while the latter is guided by an egalitarian rule of justice. With respect to motivation practices, students thus seem to prefer a more egalitarian distribution. Exploring sense of justice and definitions of entitlement in various domains of school life in Israeli junior high schools, Dar and Resh (2001) also found students to be more egalitarian in the relational domain (teacher–student relations, peer relations) than in the academic domain.

A study by Bear and Fink (1991) examined fifth and eighth graders' perceptions of the fairness of disciplinary practices (such as suspension) imposed by teachers on students who have been disturbing the class or who were involved in a fight. They assumed that fighting is the more severe offense, because it is intrinsically (morally) wrong, harming, and violating the rights of others, and therefore should incur harsher punishment. Disturbing the class, in contrast,

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[4] These relational rewards are defined by some researchers as an "interpersonal aspect of procedures," suggesting that this may be a specific domain of procedural justice—see Vermunt and Steensma, 2016, Chap. 12 of this handbook. In the context of schooling, we tend to perceive it as a category of rewards allocated mainly by teachers (but also by peers) in the teaching–learning process. Whatever the definition, there is agreement that students (or teachers) define expectations (norms) of "fair distribution" of these rewards and that perceived justice or injustice in their distribution may have motivational and attitudinal consequences.

involves breaching a social convention, which is more bound to a social context and should therefore have less severe repercussions. Classifying students who had broken disciplinary rules into two groups, based on their "reputations" (well behaved and misbehaving), the authors further assumed that judgments of fairness of a given disciplinary practice would also take into account the reputation of the transgressor. Findings confirmed both assumptions: suspension of the transgressor was perceived as fairer for fighting than for disturbing the class and as fairer for a misbehaving student than for a well-behaved one. Interestingly, however, the effect of reputation on fairness judgments was stronger than the effect of severity of the infraction. Thus, disciplinary practices were guided by a notion of equity (applied to the distribution of negative outcomes), and fair punishment (suspension) was supposed to be in proportion to the severity of the offense and the reputation of classmates (see also Hamilton & Rytina, 1980).

19.6.2 Actual (In)justice in Teachers–Student Relations

Both academic discourse and fine literature relate to teachers (and schools in general) as a possible source of students' sense of justice (or injustice), but there are relatively few investigations that measure the actual amount of perceived teachers' relational injustice, and in some of them the measurement scale mixed items about fairness in grading with those related to relations (respect, help, and the like). Such is the scale used by Gogard (2012), who found in a comparative study of five EU countries (middle schools) a similar, quite low level of perceived justice: less than 50 % of the students agree that their teachers are fair. Interestingly, this perception did not vary by social class. Similarly Berti et al. (2010) found that about 60 % of students perceived injustice in communication in class (their definition of interactional justice). With respect to Germany, Peter et al. (2012) show a mean of 4.24 (in a scale of 1–6) of perceived teacher fairness.

19.6.3 Consequences

Perceived injustice in teacher–student relations that arises in teaching–learning interactions is particularly important because it has attitudinal and behavioral consequences that affect students' evaluation of the class and school educational climate and their learning motivation and behavior (Peter & Dalbert, 2010; Wubbels & Brekelmans, 2005). In his international study, Gogard (2012) suggests that justice experience is the most effective factor impacting student evaluations of the school as a fair place, trust in teachers and in people in general, and the readiness to extend help to others, especially "weak" students. Berti et al. (2010) also found that perceived injustice affects sense of identification with the class and school. Resh and Sabbagh (2013, 2014a) showed that sense of relational justice seems to have a greater effect than sense of justice about grade distribution, and that the former significantly affects a range of civic attitudes: democratic orientation, trust in people and in institutions, and sense of belonging to school.

19.7 Conclusion

Considering the high significance attributed to formal education as an essential asset to both individuals and the public, the relatively limited discussion about it in the framework of justice distribution is a bit surprising. Yet, it is not that educationalists and academics have not been concerned about injustice in the distribution of various educational resources. Rather, they have been framing their concerns in terms of inequality, gaps, disadvantage, and the like (Coleman et al., 1966; Jencks et al., 1972; Lynch, 2000; Shavit & Blossfeld, 1992). Hence, framing educational issues as justice distribution issues—elaborating upon teachers' and students' views of the just principles that should be used, versus what is actually being implemented, in the distribution of a wide scope of "goods" and "bads" in schools, as well as students' evaluation of their justice experience in schools—should be a highly productive and insightful venue for future research.

We suggest that the critical significance of a just school, or rather of justice in schools, is largely threefold. First, ensuring school "fairness" in both structure and daily practices has merit of its own, as people are striving to achieve justice and to restore it when violated. This is especially true since schools represent a microcosmos of society to their students. Second, the just or unjust distribution of resources and rewards to the school and in school has instrumental significance, as it affects students' motivation, their chances of educational success and, consequently, their future educational and life chances. Third, the experience of just or unjust distribution of resources in schools is a form of latent curriculum that may be a factor in shaping students' worldviews, social perspectives, and actual behavior.

Consistent with the "spheres of justice" arguments outlined by Michael Walzer, this thematic review has documented a rich variety of justice rules that guide the distribution of various goods within the educational domain. However, actual distribution practices are not necessarily those perceived as most just, which is a source of a sense of injustice among students. Most salient among these "justice gaps" are placement decisions and the reality of teacher–student relations, which often seem to be biased by the application of in-born or interpersonal criteria, such as gender, class and ethnicity, or personal idiosyncrasies of teachers and other school staff.

These findings have implications for social–psychological and sociological research on education. Future research should further inquire into the justice claims and the actual patterns of distribution across a wider range of educational goods, settings (including private, public, religious, secular, and family-based schools), and variables (including individual-level variables, such as life experiences). Moreover, cross-cultural comparisons should investigate the extent to which the findings reported here are valid outside of advanced Western-style democracies. Finally, in addition to quantitative, individual-level studies of the type reviewed here, future research directions should aim to use more integrative sociological and psychological approaches, as well as qualitative and historical methodologies. As we hope to have demonstrated, a more consistent research focus on the manifold faces of social justice *within* education harbors the hope of significantly advancing our understanding of how the interplay of justice ideals and practices influences the ways in which our schools can prepare future generations for citizenship in pluralistic democracies.

Finally, our review focuses on distribution per se and did not cover issues pertaining to procedural justice in various educational spheres—namely, to the fairness of the means by which distributions, or decisions about them, are made (for an overview, see Vermunt & Steensma, 2016, Chap. 12 of this handbook). Components of fair procedure include the accepted criteria of reward allocation; consistency, universality, and transparency in using these criteria; and having a "voice," that is, the legitimacy to appeal when "fair" procedure seems to be violated. Hence, procedures of reward distribution may become, in themselves, the source of a sense of (in)justice, which may affect both the legitimacy of distribution outcomes and satisfaction with them (for an overview, see Hegtvedt, Johnson, & Watson, 2016, Chap. 23 of this handbook). "Fair" procedures are thus as relevant in the educational sphere. However, relatively little research has focused on procedural justice and its consequences among parties of the educational system (administrators, teachers, students) and this gap is also calling for further and wider investigation.

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Justice and Environmental Sustainability

20

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20.1 The Environment as a Context for Justice

The natural environment has become an important domain in which to examine issues of justice (Clayton & Müller, 2013; Clayton & Opotow, 2003). Research on environmental justice first came into focus in the 1970s against the background of the New Environmental Paradigm (Dunlap & Van Liere, 1978), and in the 1990s became a broader research field within environmental psychology (Clayton, 1996; Horwitz, 1994; Montada & Kals, 1995; Opotow & Clayton, 1994). Among the public, growing awareness of a shortage in environmental resources such as clean water and arable land has brought attention to the question of how those resources are distributed (Hegtvedt & Flinn, 2000; Lerner, 1981; Syme, 2012; see also United Nations Educational, Scientific, and Cultural Organization [UNESCO], 2006). Increased sci-

entific understanding of the interdependence of ecosystem elements means that people are more likely to recognize the causal link between an action and its environmental consequences, and to make a judgment about the ethics of that action, embracing considerations of justice as well as responsibility. Perhaps most important, the rapid rate of ecological change provides a reference point that may frame the current situation as unjust: the exponential growth in human population and the urban development and pollution that are associated with it are affecting the quality of our natural environment and our climate so rapidly that people are able to perceive the change during their own lifetime, and even to anticipate further degradation.

The enhanced salience of justice in regard to environmental challenges complements the fact that many people believe that there is a moral or ethical component underlying the distribution and treatment of environmental entities (Hussar & Horvath, 2011; Kahn, 2001; Kempton, Boster, & Hartley, 1995). However, existing models of justice cannot be simply extended to address environmental issues. Environmental goods and services are unlike many other resources, such as financial benefits, that have been the focus of justice research. People of future generations will be affected by ecologically relevant decisions made today. Geographically specific actions may have effects that diffuse across boundaries. The indivisibility of environmental resources, and the complex interdependence of ecosystems, make it

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impossible to isolate an individual or even national share of environmental resources for people to utilize as they wish. Thus, environmental issues comprise a particularly rich area for justice researchers, and considerations of environmental justice challenge us to think about contexts that are not clearly bounded in time, space, or scale.

A justice perspective on environmental issues illuminates the reasons that these issues are so contested and emotional. An environmental perspective on justice research challenges us to recognize some of the ways in which current theories are insufficient. By reviewing the research and writings surrounding justice and the natural environment in this chapter, we hope to raise new questions that inspire more work in this area. This chapter will review empirical research on individual justice judgments, justice-related emotions (like indignation and outrage), and their attitudinal and behavioral implications. The scope of empirical research ranges from integrative issues of moral inclusion to targeted analyses of local environmental conflicts from a justice perspective. We consider justice judgments with regard to behavior and attitudes of individuals and groups in political, economic, and social domains, as well as issues surrounding political instruments that impact ecologically relevant behaviors and decisions.

The current chapter consists of six sections. After this first, introductory, section we review characteristics of environmental issues that make them distinctive examples of justice reasoning, and consider issues of distribution and inclusion, as well as emerging new dimensions of justice (Sect. 20.2). Next, we review findings on individual justice judgments in relationship to social groups and to policies (especially with regard to the competing dimensions of sustainability), and motivated justice perceptions driven by ideological inclinations and tendencies to justify the current system (Sect. 20.3). We then further explore the behavioral impact of justice perceptions and the motives and emotions that underlie them (Sect. 20.4). Finally, we suggest practical implications for policy, management, and conflict resolution (Sect. 20.5) as well as promising directions for future research (Sect. 20.6).

20.2 General Perspectives on Environmental Justice

20.2.1 Distributing Environmental Resources

Research on distribution has been a central topic within the area of justice research (e.g., Adams, 1963; Deutsch, 1975, 2000; Walster, Walster, & Berscheid, 1978). The fair allocation of resources is an almost universal concern, from children competing over cookies to corporate managers assigning salaries. Consequently, it has played a major role within environmental psychology from its inception: Although in the late 1960s psychological research began to examine environmental concerns (Gifford, 2007), the field grew exponentially in response to the energy crisis in the 1970s. From the beginning, empirical studies of energy crises focused on justice-relevant questions of causation, guilt, and fair distribution of scarce resources (Kushler, 1989), and ecological crises continue to provide impetus for research on decisions on resource use and allocation. A recent example addresses attitudes and commitments to the use of nuclear power after the Fukushima Daiichi nuclear disaster in 2011 (Sirrenberg & Kals, in press).

Yet, as suggested earlier, research on the distribution of ecological goods and resources must take into account the ways in which environmental resources are conceptualized differently from other types of resources. First, environmental resources are often more interconnected compared to other types of resources, thus attitudes about entitlement to environmental resources are complicated. Although some may believe that identifiable parts of natural resources, like property, are clearly allocated to specific recipients, in practice the way one individual uses his or her resources is likely to affect the resources of others, often by diminishing their value. This disjunction between perceptions and reality may underlie many conflicts over alleged violations of property rights. In other cases, environmental resources have been considered to be common goods, freely available to all who can utilize them. Thus, the "commons dilemma," in which

shared access to a common resource leads to depletion of the resource, has been considered particularly applicable to environmental issues. There is a large body of research addressing environmental resources as commons and exploring circumstances under which cooperation for protection of the resource is more or less likely (e.g., Committee on the Human Dimensions of Global Change, 2002; Van Vugt, 2009).

Second, in recent years there has been increasing awareness of the variety of benefits that natural environments provide. Not only goods such as clean air and water, and arable land, whose direct benefits are obvious, but also ecosystem services such as pollination, protection from stormwater surges, and carbon sequestration are provided by healthy ecosystems. Psychological research suggests that nature also contributes to cognitive functioning, mental well-being, and social capital (e.g., Wells & Rollings, 2012). The fair way of allocating access to such noneconomic benefits might be more challenging to delineate than the equivalent allocation of clearly understood resources such as clean water or the economic productivity of farmland.

Third, environmental resources are often considered in terms of costs as well as benefits. Research on the unjust distribution of environmental resources has typically emphasized the distribution of costs such as exposure to toxins. The costs of mitigating or ameliorating environmental damage are also significant. There is evidence that one of the obstacles to effective international agreements to address climate change is disagreement about what is a fair way of distributing the costs associated with mitigation (Kriss, Loewenstein, Wang, & Weber, 2011; Lange, Vogt, & Ziegler, 2007).

20.2.2 Models of Distribution

Distributive justice can follow many principles, but the literature is dominated by three models: equity, equality, and need. When it comes to environmental resources, equity—a distribution in which people who contribute or deserve more also receive more—is problematic because of the

lack of divisibility noted earlier. The concept of property rights, in which people are allowed to make decisions about the land they own, is related to an equity model in which the environmental benefit, that is, land, is allocated according to monetary inputs. Although many people endorse this model, others have discovered that their property cannot be insulated from wider environmental influences: rising sea levels erode coastlines, sinkholes swallow houses, and hidden toxins permeate the soil. Similarly, when a property owner harms his or her environment, say by contaminating the groundwater through inappropriate use of pesticides or disposal of motor oil, the effects of that damage will be felt by a large and ill-defined group of people. The benefits from any fine levied against the individual are unlikely to go to those affected.

A distributive approach that emphasizes needs may receive some support (e.g., Lukasiewicz, Syme, Bowmer, & Davidson, 2013), but it requires us to think carefully about what is needed. People need clean air and water, but do they also need green space, given the evidence for its impact on well-being? A more general discussion of the right to healthy nature has not yet permeated public discourse, nor prompted much work by justice researchers. Also relevant is the question of whether a needs-based approach prescribes upper as well as lower limits. Support for justice has been described as an efficient way of optimizing outcomes (e.g., Allison & Messick, 1990). People cooperate with others and work as part of a group, or society, because of their confidence that the distribution will be fair. If some use more than they need, does that constitute injustice regardless of their impact on others?

Justice research suggests that people are reluctant to see others overcompensated and will even accept less in order to ensure a more "just" distribution. Translated to the environmental sphere, this might suggest that excessive consumption of environmental goods—consuming more than one needs—is inherently unjust. If so, people might respond to this excessive consumption by punishing those who consume excessively, by consuming more themselves, and/or by reducing their identification with the group. Work by Markowitz

and Bowerman (2012) suggests that a large proportion of the public, at least in the U.S., does disapprove of excessive consumption. This may represent an emerging model of justice. It remains to be seen whether it will have a wide impact on society.

Compared to an equity model of distribution, an equality model for distributing environmental resources tends to receive more support (e.g., Clayton, 2008). People endorse the idea, in general, that environmental resources are common goods and should be available to all. There is some sense that environmental harms should be equally distributed, rather than having some people bear an unequal share of the burden. But this model in turn raises another ill-defined question: who is counted? Who is included in the moral universe?

20.2.3 Issues Surrounding Inclusion

One of the key ways in which justice has been raised with regard to environmental issues has been in the identification of "environmental injustice": situations in which environmental costs, such as exposure to toxins, are unevenly distributed across different sectors of society (e.g., Nweke & Lee, 2011). When those who receive more of the costs are shown to be disproportionately members of ethnic minority groups, the situation is described as "environmental racism." The assumption is that increased exposure to risk results not from bad luck or random fluctuation but from a type of societal exclusion. People of low socioeconomic status or who are members of minority groups lack the access to political and economic power that would mark their full inclusion as equal-status members of society, with all the rights of any other members. This moral exclusion is characterized by both distributive and procedural injustice: the unequal distribution of environmental costs and benefits is at least in part a consequence of a lack of voice, with minority groups not consulted in the making of decisions that affect environmental conditions.

The manifestation of moral exclusion, particularly in environmental dilemmas, has been closely examined by Opotow (1990, 1994). Exclusion is not only associated with belonging to a marginalized social group but can be based on concerns about relative group standing as well. That is, moral exclusion can be a motivated strategy for justifying one's harsh actions toward, or privileged position over, a group with which one's own group is in competition for status or resources. If a group has been excluded from moral consideration, its members may be belittled, stigmatized, and isolated. They are not considered to deserve fair treatment or a fair share of needed resources. Thus, an overall belief in justice can be maintained despite the disadvantaged position and unfair experienced of outgroups, because their situation is irrelevant.

As arguments are made about what is or is not fair regarding environmental issues, complex questions regarding inclusion emerge. Most research related to justice takes for granted that we know whose interests or rights are relevant. But environmental questions raise the possibility that we need to extend our scope of justice to include other types and levels of moral actors. Should nature itself, or natural entities, deserve moral consideration (Lukasiewicz et al., 2013; Stone, 1972)? Do we need to consider the rights of future generations? What are our obligations to animal species?

The topic of animal rights has generated a vast amount of literature, which we do not attempt to summarize here. It is clear, though, that taking the interests of animals into account would lead to very different perspectives on justice when thinking about things like animal research, zoos, and vegetarianism. But whereas individuals can make their own decisions about whether to eat meat, visit zoos, or use products that have been tested on animals, only at the societal level can we decide whether to protect species or provide them with habitat. Thus, the question of animal rights has emerged as important in public discourse about environmental protection.

It is worth noting that support for animal rights is part of a general trend toward an expanded moral universe in Western thought, and that it is associated with a general orientation that endows the natural environment with intrinsic

value. For example, Clayton (2008) found that people with a strong environmental identity—a sense of themselves as interdependent with the natural world—showed more support for animal rights. Other research suggests that a willingness to attribute intrinsic moral value to nature is associated with a higher level of moral reasoning (Karpiak & Baril, 2008).

Even among those willing to consider the moral standing of nonhuman entities, however, there is a lack of clarity about whose interests to consider. Do individual animals have rights or only species? Specific rivers or ecosystems? Environmental dilemmas may pull us away from a focus on the treatment of individual entities, as even a focus on human rights requires us to consider groups such as unidentifiable future generations rather than simply collections of individuals (Weiss, 1992).

20.2.4 New Dimensions of Justice

In order to decide whether a situation or process is fair, we must be able to envision what a just outcome would look like. Although many of the instances in which people evaluate the justice or injustice of environmental policies involve weighing concrete costs and benefits to specific people at a particular place and time, in general environmental issues challenge us to expand our thinking along multiple dimensions. Because of the ways in which environmental costs, as well as benefits, resist allocation among individuals, they must be considered at the group level, in terms of their impacts on states, nations, or even humankind as a whole. As Brickman, Folger, Goode, and Schul (1981) pointed out in their classic distinction between microjustice and macrojustice, this raises questions that relate less to the allocation rule by which individual inputs lead to individual outcomes, and more to the desired shape of the overall distribution. What is the minimum level of access to green space, clean air, and fresh water that we consider fair? What is the maximum permissible level of exposure to toxins or the maximum number of species extinctions?

Increasingly, another dimension that needs to be considered is the temporal one. Impacts on the environment today will have consequences, sometimes expanding ones, in the future. Economists have extensively explored the phenomenon of temporal discounting, by which future outcomes are assigned lower weight than the equivalent outcomes in the present. One explanation for temporal discounting is that those who will experience future costs somehow count less than those who might experience present costs. But the idea of intergenerational equity implies that each generation has equal status (Weiss, 1992); thus, it is not fair to burden future generations with the consequences of our greenhouse gas emissions. Although the term "intergenerational justice" is quite common in the context of environmental research, it is not precisely defined what generations are being considered. Psychologically, the next generation (one's own children) is the easiest to think of and to take responsibility for, and this may extend to the generation thereafter (one's grandchildren). But the more conscious reflection on distinct future generations is required, the less personal commitment might result (Gethmann, 2008; the question of intergenerational justice will again be picked up in the context of "sustainability," in Sect. 20.3.3).

In sum, environmental resource distribution poses challenging justice dilemmas: What is fair with regard to access, use, and protection of the natural environment? What justice principles should be followed for resource distribution, and how can decision-makers address potentially unequal benefits across groups? Who is included in the domain of environmental rights (e.g., pollution rights or the rights to live in healthy environment), and based on which justice arguments? Are some needs irrefutable, while others are disputable? And how can the needs and rights of future generations be included in resource decision-making?

Moreover, by what political means should environmental protection be implemented and justice maintained? Protection of the natural environment and fair distribution of rights and burdens are often accomplished through policy

instruments, whose efficacy depends on acceptance and perceived justice by the population. Hence, in the next part of this chapter we review empirical findings on individuals' perceptions of justice, starting from general responses to justice and lack thereof, and then focusing on specific perceptions of policies and on underlying ideological motivations.

20.3 Perceptions of Justice

20.3.1 Individual Justice Perceptions and Differences Between Groups

A widespread and increasing awareness of ecological injustices and concern about environmental problems exists within the general population (e.g., Clayton, 1996; Montada & Kals, 1995; Törnblom & Kazemi, 2007). Yet, notable differences between groups continue to be observed. The extent to which environmental protection is seen as a moral issue varies across social groups, and is in part affected by the framing of the topic. For example, liberals in the United States are more likely than conservatives to see the environment as a moral issue, because they respond more strongly to themes of harm and care that tend to be stressed in environmental messages (Feinberg & Willer, 2013).

Group differences also stem from the interests and goals that underlie the existence of a group, and how these relate to questions of ecological protection. On one end of the spectrum are conservation groups, which espouse an explicit interest in contributing toward protection of the natural environment and supporting sustainable development. On the other end are groups whose interests may interfere with ecological aims, like motorsport clubs or supporters of local economic interests. As expected, conservationists express greater sensitivity, including justice sensitivity, to environmental problems compared to control groups matched in age, gender, and educational level. Conversely, members of motorsport clubs report lower justice sensitivity compared to matched control groups. These differences may reflect

protection against cognitive dissonance that can arise from engaging in ecologically damaging behavior (e.g., Montada & Kals, 1995) and be strengthened by linking environmental benefits and burdens with group identity (Clayton, 2000).

Environmentalists and their opponents may also be defining justice differently. An environmentalist position is linked to macrojustice-level arguments related to societal concerns, such as equality and responsibility, while a position interfering with environmentalism is linked to microjustice-level arguments, which are related to principles of equity and procedural justice (Clayton, 1998). Differences in focus on justice arguments also contribute to the occurrence and development of environmental conflicts (Clayton, 2000).

20.3.2 Justice Perceptions in Relation to Policies

Empirical findings are beginning to reveal differentiated justice judgments not only toward broad considerations of environmental dilemmas but also toward specific policies. One example is the attempt to limit carbon dioxide emissions. Taking this goal seriously requires fundamental changes in decision-making processes on political, economic, and private levels, both in the Western world and increasingly in developing countries, where people express their right to catch up with the high living standards of industrialized countries. In most cases, these changes impose short-term costs in the form of taxes or limits on the use of energy, and ecological improvements may only be experienced in the long run. People construe such shifts in benefits and externalized ecological burdens as justice problems (e.g., Clayton, 1996; Montada & Kals, 1995; Myers & Kulish, 2013; Opotow & Clayton, 1994; Törnblom & Kazemi, 2007). However, they differ in what is perceived as just concerning the distribution of profits, harms, and risks. For a specific example, Nancarrow and Syme (2001) describe controversy surrounding the fair distribution of scarce water in a dry region and the allocation of risks if too much water is consumed.

Opinions also differ about which policy instruments aimed at controlling pollution are right and fair. There are many different political instruments, such as legal regulation aimed at the reduction of damages and risks (e.g., ban on risky production); regulations by taxes and other charges which make, for example, polluting production more expensive and provide revenue for communities and the state; subsidies for environmentally friendly alternatives (e.g., in the context of energy efficiency); the allocation and trading of emission rights (which link to human rights of affected individuals who were not involved in the decision-making); and appeals to the responsibility of private or mega-actors (Montada & Kals, 2000). These instruments carry different implications for restrictiveness and efficiency, distribution of burdens and costs, freedom of choice, and personal or institutional restrictions, and consequently give rise to varying justice judgments (Montada & Kals, 2000).

According to research by Montada and Kals (2000), prohibitive laws and ecological taxation are perceived as the most just policies, followed by subsidy policies, while appeals are perceived as the least strict instrument and rejected as unjust. Prohibitive laws and ecological taxes are regarded as just since they affect everyone equally, though may be perceived as unjust by those who believe them to pose economic risks, as extreme as causing bankruptcy of companies, or to offer insufficient prevention of abuse of the natural environment. Perception of taxes as just stems especially from their ability to hold responsible those who cause ecological problems, thus reducing externalization of costs. Appeals do not force polluters to pay and may result in inequality if some follow the appeals while others free ride and profit from the obedience of others (e.g., some might take the bus instead of their car, resulting in less traffic and more parking space for those who drive). Free riders demotivate those who are willing to comply by creating a sense of injustice and disadvantage. And though appeals are favorably perceived to not interfere with rights of freedom nor cause economic risks, they are seen as less effective than stricter policies (Montada & Kals, 1995, 2000). In line with these findings, preferences for the three stricter policies (prohibitive laws, taxation, and subsidies) are positively correlated with each other (Montada & Kals, 2000) and negatively correlated with preferences for a policy of appeals.

20.3.3 Justice Perceptions in Relation to Sustainability

Justice perceptions are even more complex in regard to "sustainability" and its synonymous term "sustainable development." These terms became known in 1972 through the Club of Rome report "Limits to growth" (Meadows, Meadows, & Behrens, 1972). They began to be discussed by the United Nations in the wake of the Brundtland report and continue to be a key consideration for the U.N. (United Nations Headquarters, 2010). The early concept brought together concerns of ecology and developmental politics by focusing on intergenerational justice, whereby future generations could enjoy adequate opportunities for economic and social development, perhaps on par with the current one (World Commission on Environment and Development (WCED), 1990). The goals of sustainability include, among others, the satisfaction of basic human needs so that future conflicts over the distribution of resources can be avoided. As Weiss (1992) stated, "Sustainable development relies on a commitment to equity with future generations" (p. 19). As such, the justice perspective is inextricably linked with the concept of sustainability.

Sustainability has become one of the most popular terms within public and scientific discourse on ecological problems (WCED, 1990) and illustrates the shift toward thinking about the relationship between present and future needs and rights. The intergenerational sustainability perspective has a three-dimensional structure: the ecological dimension traces back to the aims of pollution control; the economical dimension embraces the idea that ecological and economical aims are interrelated; and the social dimension takes the needs of current and future generations into account and aims for social justice (Kruse, 2006). Sustainability is evaluated with regard to

compatibility of the three dimensions (Kaufmann-Hayoz, 2006). In most cases, especially within politics, economic and social dimensions should supplement ecological needs in comprising sustainability (Kruse, 2006). However, in practice, there is a complex and competing interplay among the three dimensions, especially between the ecological dimension aimed at environmental protection and the economic dimension aimed at growth, market freedom, and protection of job security, and only rarely do projects succeed in integrating ecological, social, and economic goals (see Kirby, 2003 for an example). Decisions, especially about specific political instruments, weigh competing aims and values against each other, and if priority is given to one dimension the others might suffer.

It remains unclear whether equal status between dimensions of sustainability really exists or should be established as a theoretical guideline (Kruse, 2006), which has led to the distinction between "weak" and "strong" sustainability (Neumayer, 1970). Whereas weak sustainability allows for the depletion of natural capital if it is compensated for by increases in human capital, strong sustainability places ecological aims at the top of a hierarchical pyramid model, followed by social and then economic aims (Neumayer, 1970). Until now, strong sustainability has not met with general approval in political and public discussions.

Psychological research has begun to increasingly investigate issues of sustainability, with a growing number of studies mentioning the term as a key word (Gifford, 2007), and putting an emphasis on urgent ecological problems like climate change (Kazdin, 2009). Although these problems pose severe justice dilemmas, analyses from a justice perspective are still rare, but suggest that the three-dimensional perspective on sustainability can partly account for differences in justice judgments of political instruments: people are able to consider how just or unjust instruments are on different dimensions, and weigh them to an overall (in)justice judgment.

The potential for divergent perspectives on justice becomes especially salient in the context of sustainability's focus on intergenerational jus-

tice, which entails concern for future generations and geographically distant people. The basis for conflict can be seen in the example of global climate change: It is caused by anthropogenic activity (IPCC, 2007) and is attributed to multiple causes (including CO_2 emissions through fossil fuel use and burning of tropical rainforests, and methane emissions in animal farming), which are generated by multiple actors and divergent activities over a long period of time. The harmful consequences of these actions emerge in the long term, follow nonlinear patterns that are difficult to predict, and will affect future generations and removed populations (e.g., in the "developing world") who neither profit from their causation through a high living standard nor are involved in the relevant decision-making process. This global intergenerational distribution of ecological benefits and costs is regarded as unjust by the majority of the population, while differences between groups are observed, as discussed earlier (Myers & Kulish, 2013; Russell, 2001).

Differentiated justice perceptions are particularly important in ecological conflicts on a local level (e.g., selecting the site of a waste incineration facility). As with global ecological conflicts (Müller, 2012), injustices in local conflicts are experienced when moral norms (including justice norms), legitimized claims, fundamental rights, laws, or contracts are violated (see Montada, 2007 for an overview). Individual interests also play a significant role, but their importance is often overestimated by conflicting parties, while the impact of perceived injustice is underestimated or overlooked (Müller, 2012). To resolve the conflict, it is necessary to understand why a political instrument or debated issue is seen as unjust, taking into consideration individuals' scope of justice (Opotow, 1994). Taking moral and justice considerations into account offers clarity on the position of conflicting parties, helping to formulate and weigh the arguments underlying justice perceptions, and to separate self-interest from justice arguments. Thus, an awareness of moral dilemmas that often underlie ecological conflicts may be achieved.

In sum, the notion of sustainability can be considered as a "fuzzy set" (Linneweber, 1998)

with multiple goals that are often in competition. Discourses on justice, prompted by local ecological conflicts, might contribute to a facet of "wisdom" of the acting people (Baltes & Staudinger, 2000), shedding light on sustainability, and at the same time upholding the original understanding of "sustainability" that focuses on ensuring intergenerational social justice.

20.3.4 Motivated Justice Perceptions

Responses to environmental problems and support for policies aimed at environmental justice and sustainability are also impacted by motivated and ideological processes, as well as by a general ecological belief in a just world (EBJW), and contribute toward individual differences in environmental perceptions and behavior.

System Justification and Ideological Motivations

Efforts to address current and long-term impacts of ecological problems are stymied by minimization and denial of such problems in general, and of climate change in particular (Feygina, Jost, & Goldsmith, 2010). Such responses appear to be motivated by a desire to maintain a view of established social, economic, and political practices as fair, successful, legitimate, and natural, which precludes a willingness to acknowledge problems that arise from such practices (Jost, Banaji, & Nosek, 2004). Environmental problems, which stem in large part from industrial processes and regulatory shortcomings, bring into question the sustainability of the status quo and of core socioeconomic institutions, and are therefore highly threatening and may elicit defensive dismissal and resistance to efforts at amelioration (Feygina, Goldsmith, & Jost, 2010). As a result, motivations to perceive systems as fair and just lead, ironically, to beliefs and behaviors that preclude the implementation of necessary policies, economic instruments, and personal choices that would ensure environmental protection and foster just outcomes.

Differences in the extent to which individuals experience motivation to support the status quo contribute to notable demographic and ideological differences in environmental attitudes and behaviors. These include decreased acknowledgement of, concern about, and response to environmental problems among men compared to women, those with lower levels of educational attainment, conservatives compared to liberals, and those more strongly identified with America (Feygina, Jost, et al., 2010). For example, politically conservative U.S. respondents were less likely than more liberal respondents to consider an environmental disaster, the explosion of the Deepwater Horizon oil rig, to represent an injustice (Clayton, Koehn, & Grover, 2013).

Importantly, the motivation to rationalize established systems is strongly linked to espousal of an array of political ideologies, including conservatism (Jost, Glaser, Kruglanski, & Sulloway, 2003), right-wing authoritarianism (Altemeyer, 2003), social dominance orientation (Pratto, Sidanius, Stallworth, & Malle, 1994), and free market ideology (Heath & Gifford, 2006). These ideologies share an underlying motivation to uphold the status quo and the social power hierarchy, and have been consistently linked to support for racial, gender, and economic inequality via stereotyping that blames victims and resistance to policies that benefit the disadvantaged in economic, social, educational, and political domains.

Beyond these impediments to social justice, system-justifying ideologies contribute toward resistance to collective and personal responsibility and action aimed at improving environmental sustainability and justice (Feygina, 2013). Espousing a conservative ideology is associated with increased support for dominating and exploiting nature, a diminished sense of concern for or duty toward the environment, and decreased engagement in environmentally sustainable individual or political-level behavior (Allen, Castano, & Allen, 2007; Cottrell, 2003; Sabbagh, 2005). Right-wing authoritarianism is correlated with holding antienvironmental attitudes, including support for environmentally destructive industrial practices and rejection of the need for environmental protection, deference to technological superiority, and a desire to punish environmentalists as they are perceived to be a threat to the eco-

nomic system (Peterson, Doty, & Winter, 1993; Schultz & Stone, 1994). Similarly, social dominance orientation is related to a perceived superiority of humans over other animals and natural phenomena, and is accompanied by an opposition to ecological protection and support for unethical and harmful behavior toward the environment (Clayton, 2008). Finally, free-market ideology is associated with an extensive faith in market systems and the devaluing of and disconnecting from nature, as well as resistance to acknowledging anthropogenic climate change (Heath & Gifford, 2006).

In sum, research consistently reveals that system-justifying worldviews contribute to unjust attitudes and behaviors toward people and the environment, by placing them in a devalued and disempowered position, thus excluding them from the domain of justice (Opotow, 1990), and justifying a lack of concern as well as personal and collective responsibility for protection and care.

Ecological Belief in a Just World

A comparable mechanism might underlie the effects of a general EBJW on perceiving the current situation and system as just despite its shortcomings. Although the Earth may be far from a "just world," considering the prevalence of environmental exploitation, most people are able to maintain a perception and belief that the world is just. The belief in a just world, introduced by Lerner (1980), describes a conviction that everyone gets what he or she deserves and deserves what he or she gets. If this belief is shattered, for example by observing severe injustice, it can be restored either by helping the victim, or by reinterpreting the situation so that the victim seems to deserve what he or she incurs (Lerner, 1980). This leads to justification of the status quo and removes the necessity for implementing changes (Hafer & Choma, 2009).

Belief in a just world has been observed in many settings, including at school and in the family (Dalbert & Stöber, 2006). With respect to the environment, it has been observed in the form of an EBJW (Baier, Kals, & Müller, 2013), covering

ecological equality of opportunities, ecological human rights, and the ecological right to modify a legal relationship (Leist, 2007). EBJW is positively correlated with justification of environmental mistreatment and a lack of responsibility for protection. The detrimental effects of EBJW have been observed in the context of energy-relevant behavior, in perceptions of justice in the distribution of valuable environmental resources, and in the justification of distribution decisions by various arguments and principles, such as equal opportunity for access to the resources. EBJW seems to be a general trait, beyond differentiated ecological justice perceptions. A similar phenomenon was investigated by Wojcik and Cislak (2013), who examined people's tendency to believe that nature itself is just. They found that people who believe in "just nature" were less likely to donate money to help victims of a natural catastrophe.

In the following section, we consider the impact of justice perceptions and valuations with regard to ecological rights, burdens, and political measures, which are influenced by ideologies and traits, on individuals' decision-making and behavior.

20.4   Motivating Behavior

20.4.1 Impact of Justice Perceptions on Behavior

The analysis of motivational bases of justice perceptions and judgments is regarded as an important prerequisite for understanding proenvironmental decisions and behaviors, and sustainable development more broadly (Kruse, 2006). Research on behavioral implications of distributive justice has focused on unfair distribution of costs and rewards (Törnblom & Kazemi, 2007), but ecological conflicts and decision-making entail consideration of procedural and interactive justice as well (Syme, 2012). Experiencing ecological injustice, especially unfair distribution of ecological costs and benefits, has been found to motivate actions against the injustice and in

support of the environment, such as avoidance of energy-intensive daily behavior and support for political measures that protect the natural environment (Clayton, 1996; Horwitz, 1994; Kals, 1996; Montada & Kals, 2000; Müller, 2012; Opotow & Clayton, 1994; Syme, 2012).

Similarly, members of conservation and environmental action groups, who engage in behaviors that benefit the natural environment, are more aware of and sensitive to environmental injustice and ecological problems. Attitudes toward environmental policies are affected by perceptions of justice (Dreyer & Walker, 2013), and research shows that individuals who hold positive attitudes toward restrictive environmental policies, such as regulation by laws and taxation, show a greater willingness to make proenvironmental commitments and engage in corresponding behavior, such as restricting personal consumption, protesting the irresponsible behavior of others, and forming action groups. The link between policy support and personal behavior is not found for policies pertaining to subsidies or appeals (Montada & Kals, 1995, 2000).

20.4.2   Harnessing Ideological Motivations Toward Proenvironmental Behavior

Motivational and ideological processes underlying justice judgments also impact behavior. Greater EBJW (which is related to justifying the status quo rather than supporting change) motivates engagement in behavior that negatively impacts the climate (Baier et al., 2013). Similarly, system justifying motivations and ideologies contribute toward decreased engagement in behaviors that protect and support the environment (Feygina, 2013). However, such processes may offer an opportunity to encourage, rather than interfere with, sustainability. Research demonstrates that helping people who are motivated to justify the status quo recognize that ecological and resource sustainability is a means to uphold and bolster existing socioeconomic systems, to act patriotically by protecting

one's country, and to ensure the continuation of one's established way of life appears to motivate proenvironmental intentions and behaviors (Feygina, Jost, et al., 2010). In other words, recognizing the confluence, rather than opposition, between economic and ecological sustainability, as well as justice, is an important pathway to garnering support for environmentally responsible behavior.

20.4.3   Emotional Responses

Attributions of Responsibility

The impact of justice judgments is not restricted to pure cognitions, but goes hand in hand with attributions of responsibility for injustice, and with justice-related emotions, such as indignation about injustice (Kals, Schumacher, & Montada, 1999; see Kals & Müller, 2012 for an overview). Attribution of moral responsibility predicts experiencing blame, indignation, and anger, and overall it appears to be an important determinant of many environmental emotions, attitudes, and behavior. Moreover, environmental losses are considered more serious when they are caused by human rather than natural events, even if the human events were unintended (Brown, Peterson, Brodersen, Ford, & Bell, 2005).

Perceived moral responsibility for the environment predicts proenvironmental behavior, in line with Schwartz's norm-activation theory (Kaiser & Shimoda, 1999). Perceptions of personal responsibility can result in guilt (Harth, Leach, & Kessler, 2013), which may also impact behavior. It appears that justice cognitions may relate to environmentally relevant behavior both directly and through a potential impact on emotion. Emotions can follow from attributions of responsibility or be triggered by experiences of injustice.

The Role of Experience

Experiencing ecological burdens, such as living in a polluted area, appears not to be related to perceptions of injustice and internal attributions

of ecological responsibility, and to have little influence on commitment to act for the natural environment on a global level (cf., Kals et al., 1999). This may be due to conflicts of interest between individuals and society, as well as short- and long-term concerns, as no direct or noticeable reductions of local ecological burdens can be expected by behavioral changes that address environmental problems of a global scale. However, personal burdens and experiences account for political activities at the local level, such as engagement in a citizens' initiative (cf., Kals, Becker, & Ittner, 2006). Personal experience may enhance a sense of personal responsibility and strengthen the perceived moral significance of environmental harm.

Relationship to Nature

A sense of personal relationship with nature is an important emotional basis of proenvironmental behavior (Kals, in press; Mayer & Frantz, 2004; Nisbet, Zelenski, & Murphy, 2009). If nature has become part of an individual's identity, it is experienced as having moral standing and deserving of protection (Clayton, 2003, 2008, 2012), and this attachment links environmental values and personal moral obligations to protection of the natural environment. As such, it is closely related to biospheric and altruistic values, but not to egoistic values (see Müller, 2012). A sense of relatedness to nature may lead a perception of environmental harm to evoke a stronger emotional response (Berenguer, 2007).

Overall, emotional responses are an important predictors of environmental behavior (Carrus, Passafaro, & Bonnes, 2008); they often follow direct experience, and are more likely following perceived injustice as well as attributions of personal responsibility. Proenvironmental behavior for the sake of the general commons appears to be motivated by perceptions of ecological injustices and by taking ecological responsibility to reduce these injustices (Kals et al., 1999), which may be facilitated by personal closeness and identification with nature, as well as the experience of environmental burdens.

20.5 Implications for Policy, Management, and Conflict Resolution

The success of environmental policies depends on perception of such policies as just. Perceived injustice of a policy demotivates not only those who perceive themselves as unjustly disadvantaged but also those who seem unjustly advantaged. This effect is observed in research on intergenerational as well as international ecological injustices (Hegtvedt & Flinn, 2000; Russell, 2001). Perceptions of fairness, on the other hand, affect willingness to pay for public goods (Ajzen, Rosenthal, & Brown, 2000) and support of a carbon tax (Dreyer & Walker, 2013); trust in agencies is an important predictor of accepting their environmental allocations (Devine-Wright, 2013; Syme & Nancarrow, 2012); and fair allocation procedures increase acceptance of an unfavorable outcome (Greenberg & Folger, 1983), especially of personal outcome acceptance in ecological conflicts (Müller & Kals, 2007).

Importantly, people do not act only on the basis of self-interest but also for the (environmental) sake of the community. For example, people were found to check their tires more when the behavior was described as a way to protect the environment, but not when it was described as a way to save money (Bolderdijk, Steg, Geller, Lehman, & Postmes, 2013). Moreover, the finding (described earlier) that appeals to behave sustainably may be rejected as unjust whereas strict policies, like prohibitions, are accepted as just, suggests that policies requiring unselfish proenvironmental motives can be accepted by the general population (Montada & Kals, 2000).

This offers important policy advice: People do not simply state "not in my back yard" or "vote with their pocketbook," but rather accept ecological restrictions when they are regarded as just. Political decision-makers should take seriously people's awareness of justice problems that result from policies, and should replace policies perceived as unjust (e.g., mere appeals) with ones that try to balance the dimensions of sustainability and are judged to be more just (e.g., stricter and more efficient regulations).

This finding also brings into question the ubiquitous belief in self-interest as a motive (Lerner & Clayton, 2011). While self-interest can account for engagement oriented toward the local natural environment and protection of one's "backyard," even in this context ecological responsibility for the community and justice judgments are of relevance. Such justice appraisals stem from a justice motive and empirically cannot be traced to hidden self-interests (Kals et al., 2006).

Therefore, politicians need to be aware of the justice motive and activate it by making people aware of the congruence between ecological care for personal and societal well-being. This long-term perspective may be facilitated by burgeoning ecological awareness within the general population of Western societies and strengthened by more readily observable environmental changes and their increasing impacts.

Moreover, communication in policy and business domains can benefit from taking into consideration and directly addressing motivational and ideological influences on reactions to changes and initiatives. People's perceptions, attitudes, and behaviors are powerfully determined by deeply seated connections to the socioeconomic system and by the need to protect and justify its institutions. As such, it is important for processes that aim to improve environmental justice to also address system-oriented concerns, ensure that environmental and socioeconomic sustainability are cultivated in tandem, and that communications make clear the confluence, rather than conflict, between these goals (Feygina, Jost, et al. 2010).

20.6 Directions for Future Research

We have reviewed a wide range of research to make three key arguments. First, environmental resources add new complexities to existing models of distributive justice, in particular suggesting further consideration of concepts such as need, inclusion, and the temporal dimension. Second, perceptions of justice are affected by the particular characteristics of environmental policy, but also by group membership, ideology, and the fundamental need to believe in a just world. Third, justice perceptions matter in motivating and directing behavioral responses, and thus have practical policy implications. Our review suggests a number of important directions for future research; we identify four in particular.

First, at a theoretical level, we need more research that considers the expansion of the moral universe. When are nature and natural entities considered to have rights, and what are the consequences? As the temporal dimension becomes important, how far into the future are people prepared to extend their moral calculation? What environmental rights and obligations do we extend to individuals and groups who are geographically and culturally remote from us, and who have less power and voice in the global economy? What are the implications of considering systems rather than individuals as moral actors and stakeholders?

Second, as part of a tendency to connect individual justice beliefs and perceptions to societal issues, there is a need to examine predictors of justice perceptions not only in general but with regard to specific situations. Such research should also explore preferences for new forms of distribution, such as the possibility of a ceiling on consumption, and equal access to environmental benefits as well as costs. This topic can encompass issues of moral inclusion by considering environmental justice and the distribution of environmental costs and benefits across different societal groups. This approach builds on psychological insight into subjective justice experiences and judgments in order to inform development of environmental policy that is both fair and acceptable.

A third, and related, direction is to recognize that understanding and realizing the goals of environmental justice is an interdisciplinary challenge (Walker, 2012). Integrating the perspectives of psychology, economics, and public policy is important for research as well as practical application (Ittner & Ohl, 2012). Collaboration with economists and policy-makers can help to improve ways to compensate people for loss of environmental resources or include their market

value in policy decisions. Another approach is to shift from a traditional focus on the quantity of environmental resources to their quality, by evaluating their benefits and considering the amount and type of value they provide. While it is not easy to describe environmental resources in terms of distributions, economists have begun to expand their thinking beyond traditional economic values and are working with psychologists and others to generate a more complete valuation of natural benefits (e.g., Ringold, Boyd, Landers, & Weber, 2013). Further, collaboration with political scientists and policy-makers should explore the role of ideology in the perception of, and response to, environmental justice. Not only do psychological factors affect perceptions of justice, so too do social and political influences tied to group identities. The politicization of environmental issues means that we need to investigate these influences in order to work toward the implementation of more just environmental policies.

Finally, research would do well to investigate ecological conflicts at multiple levels, including local, national, and global, in order to develop a better understanding of justice perceptions and ecological decision-making. In these contexts, justice judgments are of special practical relevance as tools to support conflict resolution and offer opportunities for in-depth research. The action plan "Agenda 21" of the United Nations is based on the idea that proenvironmental behaviors and decision-making can be executed on local, national, and global levels. But psychological perspectives prioritize individual behavior and analyze its many levels, from daily behavioral decisions of regular individuals to decision-makers involved in global political processes. This approach needs to be expanded to include justice issues and perceptions on all levels of decision-making, in order to offer understanding of and support for real-world processes that are currently unfolding.

A promising methodology is qualitative field research, such as analyses of conflicts on the allocation of natural resources or location decisions, perhaps working with conservation practitioners and anthropologists. Field research entails a reduction of internal validity but an increase in the external validity and direct practical applica-

bility of the findings. Qualitative research strategies, such as semistructured interviews, completing sentences, and free association, rather than commonplace reliance on preformulated items, can improve assessment of justice perceptions. Such field research is likely to encounter challenging practical problems, as environmental conflicts are often acted out on a highly charged emotional level. Due to powerful dynamics of the conflict, research has to be done under intense time pressure, and often adaptations of the assessment instruments are necessary over time. But overcoming these problems rewards the investigator with externally validated data on the justice processes underlying ecological conflicts, which can be used for mediation and development of effective resolution strategies.

The principal concern of early research on environment and justice was with local and national ecological problems, while later research has focused on attitudes and behaviors toward global ecological problems, such as climate change (Kruse, 2006). Future research needs to continue expanding the scope under consideration, including intergenerational and intertemporal aspects, while maintaining a focus on local environmental issues. In the context of increasing interdependencies across space, time, and species, researchers from multiple disciplines should work in concert to examine subjective reactions to different justice models in the context of specific environmental challenges.

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Inequity Responses in Nonhuman Animals

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21.1 Introduction

Consider how many times you have heard, said or thought, "That's not fair!" Humans are deeply concerned with issues of fairness and justice in both our own lives and the lives of others. Although human responses to inequity vary based on factors such as culture (Henrich et al., 2001), personality (Colquitt, Scott, Judge, & Shaw, 2006; Wiesenfeld, Swann, Brockner, & Bartel, 2007), and relationship quality (Attridge & Berscheid, 1994; Clark & Grote, 2003), these responses are found across cultures (Haidt, 2012) and show consistent brain activation patterns (Lieberman, 2007). Moreover, humans not only react strongly to receiving less than a social partner (Fehr & Rockenbach, 2003; Hatfield, Walster, & Berscheid, 1978; Kahneman, Knetsch, & Thaler, 1986; Zizzo & Oswald, 2001), but will also incur costs to punish those who behave unfairly, even if we have not been affected by the inequity ourselves (Fehr & Fischbacher, 2004). In behavioral and experimental economics, these reactions are often referred to as inequity aversion (IA), which includes both disadvantageous inequity aversion, reacting aversely to obtaining fewer benefits than a partner, and advantageous inequity aversion, in which the actor reacts negatively to being overcompensated, or obtaining more rewards than a partner.

Humans are not alone in this response. Evidence accumulating over the previous decade shows that other species also respond negatively to getting a less valuable outcome than a partner (reviewed in Brosnan, 2013), and in some cases may even be sensitive to receiving more (e.g., Brosnan, Talbot, Ahlgren, Lambeth, & Schapiro, 2010). Although most of the research effort has focused on nonhuman primates, even newer evidence shows that this response is also present in some nonprimates. This widespread distribution allows us to explore the evolution of fairness by using the comparative approach. Understanding the evolution of traits such as fairness provides insight in to why traits evolved and the situations in which it will, or will not, occur. For instance, research has established that there are substantial differences in the response across individuals and contexts (Price & Brosnan, 2012), allowing us to use other species as model systems in which to explore how various features influence inequity responses. We can also use the comparative approach to study the function of the behavior, or the reason why it evolved. This trait is not universal within the primates (e.g, Talbot, Freeman, Williams, & Brosnan, 2011), therefore we look for correlations between a sensitivity to

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inequity and other traits across species to determine which situations may have led to the evolution of this response. With respect to IA, such an approach has substantiated the hypothesis that the ability to compare one's own effort and payoff with that of a partner may have played a key role in the evolution of cooperation (discussed in more detail below; Brosnan, 2006b; Fehr & Fischbacher, 2003).

Our goal in writing this chapter is to highlight the importance of the nonhuman literature for understanding the evolution of fairness in humans. We first describe the comparative approach, following which we discuss research on inequity responses in animals. We focus on the nonhuman primates (hereafter, primates) both because, to date, the majority of research effort has been directed at the primates and because humans are also primates. We use these data to evaluate several hypotheses on the function of the inequity response. We next consider how this research relates to other behaviors, such as delay of gratification, prosociality, and punishment. We end with a discussion on the utility of studying responses to inequity in other species for understanding how and why people respond in the ways that they do in situations involving fairness.

21.2 Studying Inequity Responses in Nonhuman Animals

One of the challenges of studying behavior derived from humans in other species is defining these behaviors in such a way that they reflect the human construct, but can be empirically investigated in a species that does not talk and may be different in other ways. This is particularly challenging in the case of abstract ideas, such as fairness or justice. Although the two terms are often used synonymously, and are conceptually related, fairness concerns voluntary actions between individuals whereas an impartial third party usually metes out justice. Both are multifaceted concepts that include how resources are distributed (i.e., distributive justice), how people make decisions about fairness (i.e., procedural justice), and the fairness of sanctions imposed as a response to norm violations (i.e., retributive justice).

Research on nonhuman species is in its infancy and thus far has focused primarily on distributional concerns. Studies typically examine responses to various distributions of food rewards, focusing on how individuals respond to receiving less than a partner (although see Sect. 21.6.3 for a brief discussion of retributive responses to inequity in animals). This reaction is clearly more closely related to fairness than to justice (although it is not in and of itself fairness either; see Sect. 21.2.2 for more on this), thus below when we discuss nonhuman research we typically refer to inequity or, if appropriate, fairness. However, reacting negatively to receiving less than a partner is a necessary preliminary step in regulating and maintaining justice, as one must be able to first recognize when a situation is unfair before one can rectify the injustice.

21.2.1 The Comparative Approach to Studying Behavior

Studying the evolutionary trajectory of behaviors can be challenging, as we cannot directly study behaviors in the past. However, using an approach known as behavioral phylogeny, scientists can explore a behavior in a large number of species to see how the behavior varies both across the phylogenetic distribution of species and across different ecological contexts. Depending on which species share the trait, we can deduce the likelihood that the trait evolved due to common decent (i.e., homology) or in response to similar selective pressures (i.e., convergence). For instance, if two closely related species exhibit a behavior, then it is assumed to have been present in their most recent common ancestor, representing a homologous trait. If, however, two relatively distant species exhibit a behavior, but their phylogenetically closer relatives do not, then the behavior is most likely a convergent trait. Convergent traits are those that occur when two or more species experience similar selective pressures that lead to the emergence of similar traits, such as the evolution of wings in birds and insects, whose common ancestor did not have wings.

Aside from determining whether a trait represents a homology or convergence, compara-

tive analyses can tell us some things about how the trait evolved. For instance, evidence from a range of species can help us elucidate why the behavior was favored by natural selection, providing information on its evolutionary function. Understanding the selective history for a trait may help to explain situations that do not seem beneficial in modern contexts. For example, it has been proposed that cognitive and behavioral biases, or rules of thumb, evolved to help our ancestors make the best decisions, but in current times such biases may occasionally lead to suboptimal decision-making (e.g., Haselton et al., 2009). Additionally, studying how a trait varies across multiple species with different environments provides an understanding of how ecology and social environment influence the behavior.

21.2.2 The Inequity Paradigm

Much of the research examining the foundations of justice and fairness in animals has employed experimental economic games based on game theory (see Konow & Schwettman, 2016, Chap. 5 of this handbook). Game theory is an analytical approach used to study decision-making behavior by using simple decisions (e.g., accept or reject) to understand complex behaviors (e.g., inequity). Games derived from experimental economics are ideal for comparative research because these simple decisions easily generalize across multiple species using the same procedures and do not require training or instruction, both of which may bias subjects' choices. Although the goal is to keep procedures as similar as possible, nonhuman procedures, by necessity, are slightly different from those used with humans. One large difference is that the humans interact with an experimenter of their own species while animals interact with a different species (i.e., a human). Thus, it is important to include appropriate controls to understand the impact of the experimenter on an interaction. Furthermore, while human subjects can verbalize how they feel about inequitable situations, in other species we can only measure overt behavioral responses. Of course, this may also be an advantage; nonverbal procedures allow us to report what the subjects *do* instead of what they

think they do, or what they want the experimenter to think that they do.

Studies on inequity responses in animals generally measure subjects' reactions to getting a different reward as compared to a partner subsequent to both completing the same work. In the typical procedure, two subjects from the same social group, seated adjacent to one another, alternate performing a task (such as exchanging a token with a human experimenter) for a reward. The subject in question receives a less good reward than (disadvantageous IA) or a better reward than (advantageous IA) the partner, and their response is compared to a situation when both receive the same food. The subjects can easily observe the task the other completes and the reward they receive during these interactions. Behavioral responses generally manifest as negative reactions such as refusing food rewards or refusing to continue participating in the task.

While any response to the different rewards could be due to inequity, it could also be due to the discrepancy between the received reward and the other visible one, independent of whether a partner received it. Early studies with nonhuman primates demonstrated that they respond negatively when they get a less good reward than anticipated. For example, in Tinklepaugh's (1928) classic study, macaques observed an experimenter hide a preferred food reward under a bucket. The next day he lifted the bucket and allowed the macaques to take the food. At times he would, unbeknownst to the monkeys, replace the preferred reward with a piece of lettuce (not a preferred food). In these cases, when the bucket was lifted, the monkeys reacted negatively, leaving the lettuce untouched. To control for possible frustration effects in inequity studies, a control condition is used in which both subjects are shown a more preferred food reward, following which they exchange and receive the less preferred option. Critically, in this case both the subject and the partner receive the less preferred reward, as compared to the inequity tests, in which the partner receives the more preferred reward. Although both food rewards are present during inequity tests, in these contrast controls, the experimenter explicitly draws the subjects' attention to this better option. While the out-

come—refusal—is the same in the contrast and inequity conditions, in the latter case the referent is social (i.e., someone else's outcome). Species can, of course, respond to both individual and social contrast (i.e., inequity) in different situations, but the purpose of these control tests is to assure that any response in the "inequity" condition is due to the fact that the partner received the more preferred food, rather than just the presence of the preferred food. Note that the underlying mechanism for these reactions is likely the same, but the difference lies in the referent, which is a social partner in the case of inequity, but not in the case of contrast effects.

As mentioned earlier, with nonverbal species we are measuring behaviors, not intentions, so we do not know subjects' underlying motivations. Thus, we refer to these as inequity responses rather than the human term "inequity aversion" that in its inclusiveness of both disadvantageous and advantageous inequity implies a social norm of equity. Similarly, while human studies of inequity are inexorably linked to issues of fairness, justice, and morality, these are not what are being studied in other species. There are many reasons for this, but considering the most important, in human society, equity and fairness are valued as moral. This implies an underlying motivation to maintain equity across various contexts and adhere to social norms. While we can test whether animals monitor and respond to their own outcome relative to another's, we do not yet have evidence for an adherence to social norms or a sense of morality (Brosnan, 2011a, 2014). Instead, what we are studying in other species is precursor behaviors from which a sense of fairness and morality may have evolved (Brosnan, 2014). Thus, responding negatively to getting less than a partner is not a sense of fairness but is one of those behaviors that may have led to it (Brosnan & de Waal, 2014). Additionally, the use of the term "precursor" is not accidental; in chemistry, a precursor molecule is one that, when acted on by something else, can change in form. These precursors to the sense of fairness may do the same, for example starting out to serve one purpose, but then evolving to serve another.

21.3 Inequity Responses in Nonhuman Primates

The majority of research on inequity responses in animals has focused on the primates. Within the great apes, chimpanzees (Brosnan, Schiff, & de Waal, 2005; Brosnan, Talbot, et al., 2010; but see Bräuer, Call, & Tomasello, 2009) and possibly bonobos (Bräuer et al., 2009) react negatively to inequity, but orangutans do not (Bräuer et al., 2009; Brosnan, Flemming, Talbot, Mayo, & Stoinski, 2011). Among the New World monkeys tested, Callitrichids (i.e., tamarins and marmosets; Freeman et al., 2013; Neiworth, Johnson, Whillock, Greenberg, & Brown, 2009) and squirrel monkeys (Talbot et al., 2011) do not respond to inequity, although capuchin monkeys do (Brosnan & de Waal, 2003; van Wolkenten, Brosnan, & de Waal, 2007). Finally, among Old World species only two macaque species have been tested, both of which also respond to inequity (Hopper, Lambeth, Schapiro, Bernacky, & Brosnan, 2013; Massen, van den Berg, Spruijt, & Sterck, 2012). However, both between and within each of these species, a great deal of variation has been observed.

21.3.1 Individual Differences in Inequity Responses

As with humans, primates show individual differences in behavior (e.g., Baumert & Schmitt, 2016, Chap. 9 of this handbook) and not all primates respond similarly to inequity. When such individual differences are uncovered, one goal is to try to relate it to the species' social and ecological environment. When these differences are viewed across species, patterns may emerge that are indicative of how factors such as sex, kinship, dominance, reproductive status, environment, and other aspects of socioecology may influence a particular behavior. For example, there is evidence that, at least in some species, responses to inequity are influenced by sex (Brosnan, Talbot, et al., 2010), rank (Bräuer, Call, & Tomasello, 2006; Brosnan, Talbot, et al., 2010), social group

(Brosnan et al., 2005), and age (Hopper et al., 2013; see Sect. 21.7, Conclusions and Future Directions). A recent study that explored several of these factors in chimpanzees (rank, sex, social group, personality, and duration and quality of relations) found that personality, in particular, may significantly impact an individual's response to inequity and contrast. Like humans, nonhuman animals are known to show personality differences or consistent, long-term, behavioral patterns that are independent of context (Gosling, 2001). In this study, different personality dimensions correlated separately with responses to inequity and contrast suggesting that the chimpanzees viewed these two situations differently (Brosnan et al., 2015).

Rank is another critical feature for group-living primates. Even in species in which the dominants are tolerant of subordinates, dominants are nonetheless accustomed to receiving a greater share of food, mates, and social partners. Similarly, the relative ranks of the participants may determine their expectations for the division of rewards; we would anticipate that the dominant partner should react more strongly to less preferred rewards than should the subordinate partner. Some evidence supports this; dominant chimpanzees respond more strongly to inequitable outcomes than do subordinates (Bräuer et al., 2006; Brosnan, Talbot, et al., 2010). Capuchin monkeys do not show rank effects in the standard inequity paradigm (Brosnan & de Waal, 2003; van Wolkenten et al., 2007), possibly because dominant capuchins are tolerant of subordinates (Fragaszy & Visalberghi, 2004), but do in other inequity paradigms (Takimoto, Kuroshima, & Fujita, 2010). Social status should also influence humans' responses to inequity, and future primate studies may uncover particular contexts or environments in which the effect is most pronounced.

In humans, the quality of the relationship between individuals impacts responses to inequity. People in positive or neutral relationships tend to tolerate disadvantageous inequity whereas people in negative relationships do not and also become more tolerant of advantageous inequity

(Loewenstein, Thompson, & Bazerman, 1989). Moreover, couples in close relationships operate on a more communal basis while those experiencing marital conflict may switch to contingent record keeping due to perceptions of unfairness (Clark & Grote, 2003). As with humans, chimpanzees apparently vary in their response to inequity based on their social relationships. In a study that tested inequity responses in chimpanzees from multiple social groups, four subjects were pair-housed, six came from a recently formed group (within the previous 8 years), and ten came from a long-term social group (housed together for more than 30 years). The former two situations are both unusual for chimpanzees, who typically live in large, stable social groups. Within these groups, males live their entire lives in the same group and females may only change groups once, around puberty (Nishida et al., 2003). Chimpanzees that were pair-housed or were members of the short-term social group frequently refused to exchange when their partner received a better reward, while those individuals who had lived together their entire lives showed little to no response to inequitable outcomes (Brosnan et al., 2005). This latter group also demonstrated high levels of reciprocity in food sharing and grooming (de Waal, 1997), avoided confrontation (Hare, Call, & Tomasello, 2000), and, when they did fight, exhibited extensive reconciliation after conflict (Preuschoft, Wang, Aureli, & de Waal, 2002), all indicating strong social relationships. While we cannot determine whether it was the quality of these social relationships or the length of time that the subjects had lived together that influenced the chimpanzees' responses, it seems that something about their group membership influenced their behavior.

This study also highlights one of the challenges of studying nonhuman primates; without the ability to ask them about the motivations for their behaviors, we are left assessing outcomes with no understanding of intention. For instance, in the above study, it is unclear whether the decreased refusals in the group with longer term relationships were due to interest in each other's well-being or a disinterest in interrupting their

social relationships. Either is possible given what we know about chimpanzees' behavior. Chimpanzees do help one another, both in the lab (Warneken & Tomasello, 2006) and in natural interactions (de Waal, 2006), so it is feasible that they were interested in each other's outcomes. However, chimpanzees are also very sensitive to social relationships and work hard to maintain the balance that exists in the group (de Waal, 1982). As a result, we do not know whether the mechanism or mechanisms leading the chimpanzees' behavior is the same as that in humans. That being said, even if the mechanisms differ, the fact that similar outcomes have evolved implies that social relationships are very important in mediating reactions to inequity in both chimpanzees and humans. When using the comparative method, it is important to keep this distinction between function (or outcome) and mechanism in mind; confounding the two results both in assuming similarity where none exists (e.g., assuming that similar mechanisms imply similar function), or missing it altogether (e.g., assuming that disparate outcomes are underpinned by disparate mechanisms).

21.3.2 The Role of Effort

One feature that was consistent in early studies of inequity was that the subjects had to complete a task in order to receive their food reward; whether they completed this task and accepted their reward was the dependent variable of interest in determining how they responded to inequity (e.g., Brosnan & de Waal, 2003). However, subsequent studies did not all include a task, and this almost always led to different results. While these results were interpreted as showing that primates did not respond to inequity, the lack of effort may have led to subjects interpreting the task differently than in situations in which there is a task. Moreover, the dependent variable, refusal, is based only on refusal of the reward when no task is involved, which may also affect results as it is presumably more difficult for a primate to refuse a food reward than a token.

Considering capuchin monkeys, negative responses to inequity have been observed in all but one study that included a task (Brosnan & de Waal, 2003; Fletcher, 2008; van Wolkenten et al., 2007; but see: Silberberg, Crescimbene, Addessi, Anderson, & Visalberghi, 2009), but never in studies that did not include a task (Dindo & de Waal, 2007; Dubreuil, Gentile, & Visalberghi, 2006; Roma, Silberberg, Ruggiero, & Suomi, 2006). This was even true within the same group of capuchin monkeys (Brosnan & de Waal, 2003; Dindo & de Waal, 2007; van Wolkenten et al., 2007). Subsequent within-species tests compared subjects' responses to unequal outcomes when they had to work for those rewards to when the experimenter simply handed them out for "free" verified that inequity responses occur only in the context of a task in both capuchins (van Wolkenten et al., 2007) and chimpanzees (Brosnan, Talbot, et al., 2010). Recent work has shown that the type of task is not important, but only that a task is required at least in squirrel monkeys (Freeman et al., 2013).

There are several possibilities for this consistent effect of the task. First, it may be an artifact of captivity. Despite caretakers' best efforts to distribute food equally, higher ranking individuals typically obtain more and better quality foods than subordinates do through the use of aggression or intimidation, so subjects may be accustomed to situations in which foods are distributed unequally (Brosnan, Talbot, et al., 2010; Sapolsky, 2005). Alternatively, if inequity is indeed related to cooperation, then these subjects, sitting adjacent to one another and alternating participation in the task, may perceive the task as a cooperative one, triggering a sensitivity to inequity (Brosnan, 2011a, 2011b; see also Sect. 21.5, Evolution of Inequity: Emerging Patterns). In fact, the one chimpanzee study that found no response to inequity in a task-based paradigm also involved subjects sitting across from one another, separated by a 1 m wide testing space (Bräuer et al., 2009), rather than adjacent in the same enclosure, which may support the idea that the chimpanzees did not perceive that situation as one of joint action (Brosnan, Talbot, et al., 2010).

Intriguingly, despite the fact that effort seems to be essential in primate studies, in these tests subjects do not respond to differences in effort when rewards are held constant. When subjects had to exchange more (versus fewer) tokens for a reward, in neither capuchin monkeys (van Wolkenten et al., 2007) nor chimpanzees (Brosnan, Talbot, et al., 2010) did differences in the level of effort influence individuals' behavior. Similarly, in a study in which chimpanzees had to wait for 10 s (a long wait for these apes) after exchanging to receive their reward, while their partner got the reward immediately, the temporally disadvantaged chimpanzees did not respond differently (Brosnan, Talbot, et al., 2010). Thus far, only one study has showed that capuchin monkeys are sensitive to another's effort in inequitable situations (Takimoto & Fujita, 2011). Therefore, while a task appears to be essential, subjects seem to be more tolerant of differences in the level of effort than they are to differences in the level of the reward. This is different from humans, who typically expect a greater reward for a greater effort (Lawrence & Festinger, 1962), and thus is an avenue that requires greater exploration.

21.3.3 Experimental Context

All studies comparing different groups, whether or not they are of the same species, are faced with unavoidable differences in procedure. In animals, these manifest as differences in housing and husbandry that are typically beyond the control of the researcher. Facilities vary in size, shape, and spatial orientation and social arrangements are limited by the demographics of the group and the relationships among the individuals being tested. Unfortunately these factors can greatly impact responses. Both enclosure size (Bräuer, Call, & Tomasello, 2007) and visual access to other individuals (Takimoto et al., 2010) influence behavior.

Such practicalities may explain some of the conflicting results in inequity studies in chimpanzees. As mentioned earlier, chimpanzees have reacted negatively to inequity in studies in which they were seated next to one another in the same

enclosure (Brosnan et al., 2005; Brosnan, Talbot, et al., 2010), but not in studies in which they were in separate enclosures, seated across from one another and separated by a 1 m testing space (Bräuer et al., 2009). Of course, such constraints can point to important factors influencing responses. As in chimpanzees, the spatial orientation between two individuals has proven important for humans in some cognitive tasks. Humans prefer to sit opposite one another in competitive tasks, but adjacent to each other in cooperative ones. Subjects' self-reports indicate a strong interest in eye contact, particularly in the competitive task (Sommer, 1965). This may be particularly important in inequity, as these responses are apparently rooted in cooperation.

Additionally, in these studies we measure whether subjects *react* to inequity, not whether they *notice* it. In fact, it is very likely that subjects notice inequity but fail to respond. Studies of human children that have used explicit measures, such as verbal responses or active division of rewards, found little evidence that children understand distributive justice before the age of five (e.g., Fehr, Bernhard, & Rockenbach, 2008; Lane & Coon, 1972), whereas studies using implicit measures, such as emotional and behavioral responses, have found that children as young as 15 months old notice and react to inequitable distributions (e.g., LoBue, Nishida, Chiong, DeLoache, & Haidt, 2011; Schmidt & Sommerville, 2011; Sloane, Baillargeon, & Premack, 2012). This means that animal results need to be compared to humans' behavioral outcomes, not their reported decisions.

21.4 Inequity Responses in Nonprimates

Those interested in the evolution of human behavior often focus on the primates, as we ourselves are primates, however, nonprimate species may also be informative about the ecological or social conditions under which behaviors evolve as well as the contexts under which they vary. Several studies have used variants of the typical inequity procedure to explore responses in

nonprimates. Much work has focused on canids, who show sensitivity to fairness and social norms through social play in the wild (Bekoff, 2004). Lab work on domestic dogs shows that they are less willing to give a paw on command if rewards are given to a partner but they themselves receive nothing (Range, Horn, Viranyi, & Huber, 2009; Range, Leitner, & Virányi, 2012). However, unlike primates, dogs did not respond to differences in food quality, nor did they ever reject a reward. Dominance also did not influence refusals, but dogs who were socially close (i.e., regularly slept in body contact) were more averse to unequal outcomes than were dogs with a less affiliative relationships (Range et al., 2012), a pattern that differs from primates (Brosnan et al., 2005) and humans (Clark & Grote, 2003). Regardless of their partner's payoff, however, dogs prefer experimenters who give them the most rewards (Horowitz, 2012), indicating that they are more interested in maximizing their own reward than equality per se. Other recent work has focused on the corvids, who converge with primates on several behaviors. Crows and ravens decreased exchanging for a reward when a partner received a free gift and refused to work more often in the inequity condition than the equity condition (Wascher & Bugnyar, 2013). One species that does not respond to inequity is cleaner fish (Raihani, McAuliffe, Brosnan, & Bshary, 2012), a result we discuss in the next section.

21.5   Evolution of Inequity: Emerging Patterns

The comparative approach is a powerful tool for understanding the evolutionary function of a given behavior. By examining inequity across a wide range of species, we can begin to identify some emerging patterns that may help to elucidate the prerequisites for IA. Although only about a dozen species have been studied thus far, some patterns are already emerging. First, the variation of responses to inequity indicates that inequity responses are not a homology among primates. For example, within the primate Family Cebidae, capuchin monkeys do respond nega-

tively to inequity (Brosnan & de Waal, 2003) while closely related squirrel monkeys do not (Talbot et al., 2011). Likewise, among apes, humans (Hatfield et al., 1978), chimpanzees (Bräuer et al., 2009; Brosnan et al., 2005; Brosnan, Talbot, et al., 2010), and possibly bonobos (Bräuer et al., 2009) respond negatively to inequity in at least some contexts, but orangutans do not (Bräuer et al., 2009; Brosnan et al., 2011).

We can also use the existing data to rule out several other hypotheses. Almost by definition, one would only expect to find inequity responses in group-living species; solitary individuals who meet rarely have little reason to be interested in another's outcomes and so it is unlikely that the trait would have been selected for (although if the reaction is the result of a homology, it may be apparent in some solitary species nonetheless). However, it is not the case that all group-living species respond negatively to inequity. Squirrel monkeys, who are highly gregarious, do not respond to inequity (but do respond to individual contrast; Talbot et al., 2011), nor do callithrichids, who live in close family groups (Freeman et al., 2013). More specifically, some have suggested that inequity responses may be a trait shared among socially tolerant species (Neiworth et al., 2009). However, social tolerance is not necessarily a prerequisite, either, as macaques, who are generally less socially tolerant than many other primates (Thierry, 2000), also respond to inequity (Hopper et al., 2013; Massen et al., 2012). Finally, negative responses to inequity do not follow from advanced cognition. Orangutans, who have a very large brain-to-body ratio and are equivalent to other great apes on cognitive tasks (Shumaker, Palkovich, Beck, Guagnano, & Morowitz, 2001), are not sensitive to their partner's outcomes (Bräuer et al., 2009; Brosnan et al., 2011).

The hypothesis that the inequity response emerged in tandem with cooperation, as a mechanism to compare one's own effort and outcomes with that of another (Brosnan, 2006b; Fehr & Schmidt, 1999), does fit current evidence in animals (Brosnan, 2006b, 2011b; Price & Brosnan, 2012; Range et al., 2009; Wascher & Bugnyar, 2013). All of the species that respond to inequity

habitually cooperate with nonkin in various contexts, including food sharing, cooperative hunting, coalitions, and alliances (e.g., Bekoff, 2004; Dugatkin, 1997; Emery, Seed, von Bayern, & Clayton, 2007; for a review see Price & Brosnan, 2012). Negative reactions to inequity may stabilize cooperation by helping individuals recognize when a cooperative partner is getting more than their "fair share," which is a cue that it may be time to find a new, more equitable, partner (e.g., a partner choice mechanism). Although this means suffering the short-term cost of finding a new partner, it has the potential to lead to larger payoffs in the future. Note that this behavior does not necessarily require conscious decision-making by the individuals involved. For this behavior to be under positive selection, individuals who sampled other partners when they were getting less than a current one would have to be more successful than those who did not sample in this way, whether or not they understood their gain.

However, responses to inequity are only beneficial if the gains of switching to a new partner exceed the average net cost of doing so. In cases in which the benefits of maintaining a social partner are high (e.g., if the partner is related or assists with offspring care), or the costs of finding a new partner are high (e.g., if finding a new partner would mean giving up a season's reproductive output), then responding to minor inequities may not be beneficial. This seems to be the case with cooperative breeders. These species live in close-knit family groups consisting of a breeding pair and a number of additional helpers, often their offspring, to provide alloparental care (Clutton-Brock, 2006). This breeding style seems to have influenced their social behavior in a number of ways (Hrdy, 2009; Van Schaik & Burkart, 2010), and it may be that one of them is to show reduced sensitivity to inequity with one's mate due to the high costs of finding a new one (Freeman et al., 2013). Callithrichids, a cooperatively breeding group of primates, do not respond negatively to inequity (Freeman et al., 2013; Neiworth et al., 2009), nor do owl monkeys, who exhibit biparental care (Freeman et al., 2013). Humans, too, are cooperative breeders (Hrdy, 2009) and so may have been selected not to

respond to small inequities in close relationships. Supporting this, studies among marital partners have found that the stage of the relationship between two partners plays an important role in determining to what extent they respond to small inequities, such as the division of household tasks (Clark & Grote, 2003; Frisco & Williams, 2003; Pillemer, Hatfield, & Sprecher, 2008).

Another interesting exception occurs in cleaner fish. Male cleaner fish maintain small territories known as cleaning stations where they service "client" fish by removing ectoparasites and dead skin (Côté, 2000), often working with unrelated females that inhabit these cleaning stations to obtain food (e.g., join client inspections; Bshary, Grutter, Willener, & Leimar, 2008). Nonetheless, cleaner fish were not sensitive to inequity in an experimental study in which they had to complete a task (tactile stimulation) to receive a reward that sometimes differed from their partner's (Raihani et al., 2012). However, cleaner fish punish (Raihani, Grutter, & Bshary, 2010), a behavior that is uncommon in primates (Jensen, 2010; see also Sect. 21.6.3 for more on punishment). It may be that cleaners use punishment to change their partner's behavior rather than inequity to identify when it is time to find a new partner (Raihani & McAuliffe, 2012).

21.6   Inequity and Related Behaviors

21.6.1 Cognitive Requirements of Inequity Responding

In order to respond negatively to inequitable outcomes, one must first be able to recognize when another individual receives a preferred outcome (Brosnan, 2006a, 2006b). In the case of foods, this requires differentiating the quality or quantity of two foods, which most animals can do (Shettleworth, 2009). Individuals must also differentiate between their own and others' outcomes. Such discrimination is also necessary for social learning, which is also widespread across the animal kingdom (e.g., Zentall & Galef, 1988).

Once the inequity is recognized, the individual must feel strongly enough about the discrepancy between one's own outcome and another's to alter their behavior. Thus, in order to refuse a food reward in tests of inequity, one must be able to control their impulse to obtain an immediate reward or delay gratification. Not surprisingly, all of the primate species that so far have shown a negative response to inequity also are able to delay gratification in experimental tests (Dufour, Wascher, Braun, Miller, & Bugnyar, 2012; Evans & Beran, 2007; Evans, Beran, Paglieri, & Addessi, 2012; Leonardi, Vick, & Dufour, 2012). However, not all of the species that demonstrate delay of gratification exhibit negative responses to inequity (e.g., marmosets: Stevens, Rosati, Ross, & Hauser, 2005). Thus, the ability to delay gratification may be a prerequisite to refusing in the context of inequity, but inequity responses do not immediately follow from this ability. Different species are able to delay gratification for different periods of time (e.g., Evans et al., 2012), and it is possible that, once established, increased selection for negative responses to inequity selected for increased delay of gratification abilities.

Although negative responses to inequity may interact with other cognitive mechanisms, they do not necessarily involve rational or even conscious decision-making. Responses to inequity are more likely to be an emotional response, motivated by personal dissatisfaction rather than objective deduction of what is fair or just in the situation. Children, too, respond to inequitable distributions by 15 months of age, before they are able to articulate and reason about fairness or other moral issues (Schmidt & Sommerville, 2011; Sloane et al., 2012). On the other hand, it will be interesting to see whether the intent of the actor influences animals' decisions, as it does in humans, who refuse unfair offers less often when a computer dictates the distribution (Blount, 1995). There is evidence that some nonhuman primates also understand the intentional actions of others (Call, Hare, Carpenter, & Tomasello, 2004). However, in a study in which monkeys were given a choice between working with an experimenter who followed the rules and one who did not provide the promised outcomes, subjects showed no preference between the "inequitable" human and the "fair" one, whether they personally experienced the humans or observed them interacting with other monkeys (Brosnan & de Waal, 2009), possibly indicating that the intent of the experimenter did not influence their decisions. In similar experiments, neither monkeys (Sheskin, Ashayeri, Skerry, & Santos, 2014) nor dogs (Horowitz, 2012) discriminate between experimenters who previously treated them fairly versus those who did not. While it is possible that intentionality influences some primates' responses, as it does humans', more research is needed to explore this possibility.

21.6.2 Inequity and Prosocial Behavior

The studies earlier all focus on how animals respond to receiving less than a partner, or disadvantageous inequity. However, inequity aversion in humans includes two components: responding to being both disadvantaged and advantaged. Advantageous inequity aversion occurs when one responds to getting more than a partner. Although such reactions are rare in animals, they do occur on occasion. In one study, chimpanzees were more likely to refuse a highly preferred reward when their partner received a less preferred reward (e.g., the subject was advantaged) as compared to when they both received the same higher value reward (e.g., the rewards were equal). Although we do not know what the underlying motivations of the chimpanzees were, they nevertheless noticed and responded to inequitable situations in which they were overcompensated (Brosnan, Talbot, et al., 2010).

More commonly studied is prosocial behavior, in which individuals make choices that provide a benefit to their partner at no cost to themselves. Although the specifics of the designs vary, in general, subjects' responses with a partner are compared to their responses to the same reward distribution when alone; if subjects are truly pro-

social, rather than simply attracted to an option with more total food items, they should selectively choose the prosocial option when sitting next to a partner as compared to when by themselves. Although there is quite a lot of variation in outcomes, across both species and experimental paradigms, for most species that have been tested there is at least some evidence of prosocial behavior (reviewed in de Waal & Suchak, 2010; Jaeggi, Burkart, & Van Schaik, 2010; Silk & House, 2012).

More interesting for our purposes is how subjects respond when prosocial tendencies conflict with equity. In a recent study, capuchin monkeys had to choose whether or not to pull in a tray that would bring their partner either the same reward (equal options) or a more preferred one (prosocial options). Prosocial behavior is evident in this paradigm if subjects pulled in the tray more often when a partner was present than absent (excluding conditions in which the puller itself benefits, in which case they should always pull in the tray). In situations of moderate disadvantageous inequity, capuchin monkeys demonstrated prosocial behavior, delivering low value food to their partner even though the actor itself received nothing. However, when the partner received a highly preferred food and the subject received either a low value food or nothing, prosocial behavior ceased (Brosnan, Houser, et al., 2010). Thus, although negative reactions to inequity limited prosocial choices, these two behaviors can coexist and interact to shape behavior.

21.6.3 Retributive Responses to Inequity

On the opposite side of the spectrum, inflicting harm unto others may be important for the maintenance of cooperation, as selfish individuals will exploit cooperators for a "free ride." Punishment is one mechanism by which individuals may stop free riders from exploiting them (e.g., strong reciprocity; Boyd, Gintis, Bowles, & Richerson, 2003; Gintis, Bowles, Boyd, & Fehr, 2005; although see Dreber, Rand, Fudenberg, & Nowak, 2008; Rockenbach & Milinski, 2006).

Functionally, punishment is an act that imposes a cost on another individual while incurring an immediate cost to the actor, but on average, punishment results in a long-term benefit to the punisher (i.e., second-party punishment; Clutton-Brock & Parker, 1995; Fehr & Fischbacher, 2004). Humans will also punish others even when they themselves do not directly benefit, but instead the benefits go to the group (i.e., third-party/altruistic punishment; Fehr & Gächter, 2000, 2002). Although second-party punishment has been observed to occur in a wide variety of species, from eusocial insects to nonhuman primates (e.g., de Waal, 1982; Reeve & Gamboa, 1987), third-party punishment is much less common (Jensen, 2010).

Considering the evidence to date, dominant, but not subordinate, chimpanzees punished thieves when their own food was stolen, but not when someone else's was, providing evidence of second-party, but not third-party, punishment (Riedl, Jensen, Call, & Tomasello, 2012). Still, some observations of third parties intervening during conflicts are suggestive of third-party punishment because the actor is seemingly impartial to the outcome (e.g., "policing" de Waal, 1982; de Waal & van Roosmalen, 1979; Watts, Colmenares, & Arnold, 2000). Of course, it is difficult to rule out the possibility that the actors receive some sort of immediate or delayed direct benefit. However, behavior like this may have been integral in the evolution of third-party punishment. Male cleaner fish punish noncooperative females who take a bit of mucus (a preferred food) out of the client fish rather than eating only ectoparasites (see Sect. 21.4). This causes the bitten client to flee, depriving both the male and female of additional foraging opportunities. Such punishment by the male increases the likelihood that females will behave cooperatively in future interactions (second-party punishment; Raihani et al., 2010). This behavior also benefits the client fish, however, who no longer get bitten, and as such functions as third-party punishment as well. Raihani et al. (2010) argue that this form of "self-serving" third-party punishment may be a key step in the evolution of altruistic punishment observed in humans.

If third-party punishment is rare in other species, it may be more beneficial to explore second-party punishment, which may also support fairness norms, albeit in a self-interested way. One task commonly used to explore second-party punishment is the Ultimatum Game (UG; Güth, Schmittberger, & Schwarze, 1982; see also Konow & Schwettman, 2016, Chap. 5 of this handbook). In the UG, one individual (the proposer) splits a sum of money with another individual (the responder), who can either accept the offer, in which case both individuals receive the proposed allotment, or reject the offer, in which case neither individual receives any reward. Although rational choice models predict that humans should accept any offer, because any increase is better than none, in reality, people in Western cultures typically reject when less than 20 % of the sum is offered (Camerer, 2003). Possibly because they anticipate this reaction, proposers typically offer about 40 % of the allotted sum, which is more than is offered when the responder does not have the opportunity to reject offers. Versions of this task with animals and small children typically use a so-called limited form UG, in which the proposer can choose from one of only two distributions, which may be easier for them to understand.

Three UG studies have been run in chimpanzees. In two of these, proposers offered the smallest amount and responders accepted virtually all offers, including those in which they received nothing (Jensen, Call, & Tomasello, 2007; Kaiser, Jensen, Call, & Tomasello, 2012). In these studies, the way in which the responder could refuse was to fail to pull in a tray of food (i.e., inhibit an action), rather than actively choosing to reject. Such inhibitory responses are difficult even for humans; humans asked to wait 1 min to refuse an offer in a face-to-face context accepted most offers, as did the chimpanzees (Smith & Silberberg, 2010). In the third study, proposers had to choose a token and pass it to their partner, who could then either accept the offer by returning the token to the experimenter or not, refusing the offer. Their choices were compared to those in a control condition in which the responder could not influence the outcome. As with previ-

ous UG studies in chimpanzees, responders accepted all offers, however they switched from a 90 % preference for a token that brought them more rewards in the UG condition to a 60 % preference for a token that gave both individuals equal rewards in the control condition. This was also true for children in a similar task. Although there were no refusals, in both children and chimpanzees responders reacted negatively to unequal choices, so it is possible that the threat of a refusal (punishment), which is cheaper than refusing a positive outcome, was sufficient to change the proposers' behavior in favor of the responder (Milinski, 2013; Proctor, Williamson, de Waal, & Brosnan, 2013).

21.7 Conclusions and Future Directions

Comparative research on nonhuman animals provides a way to explore the evolution of humans' sense of fairness and justice. Because nonhuman primates cannot be asked how they feel about various scenarios, as we would do with humans, this research instead places subjects in situations in which an experimenter creates inequity between the subject and a conspecific social partner. Subjects who react negatively, for instance refusing rewards or refusing to participate, are considered to respond negatively to inequity. These studies have found that, like humans, some nonhuman species respond negatively to inequitable outcomes. Also like humans, different individuals react differently, and currently there is research underway to try to determine which factors are key in influencing animals' responses. The distribution of negative responses to inequity across species indicates that it is closely linked to cooperation; that is, species that cooperate extensively outside of kinship and pair-bond relationships are more likely to respond negatively to inequitable outcomes. Thus, responses to inequity may function to allow individuals to compare their own outcomes with those of another, allowing them to choose fair partners for cooperative interactions. Finally, inequity responses are likely driven by and inter-

act with other behaviors such as delay of gratifi-
cation and prosocial behavior.

Yet many questions remain. For instance,
although much human work has been devoted to
the different treatment of positive versus negative
rewards (e.g., Törnblom, 1988) and tangible ver-
sus intangible rewards, including social resources
such as love or status (e.g., Kraemer & Chen,
2012; Törnblom & Vermunt, 1999), most studies
to date in nonhumans have studied inequity only
in the context of positive food rewards (for a
notable   exception,   see   van   Leeuwen,
Zimmermann, & Ross, 2011). Thus, work is
needed in nonhuman animals to determine, first,
the degree to which food rewards or other tangi-
ble outcomes are treated differently than intangi-
bles and, second, how this differs across species.
Second, relationship quality strongly influences
inequity responses in humans, but we know very
little about how these relationships influence ani-
mals' responses. Third, we know very little about
the ontogeny of inequity responses in nonhuman
species. The only study to date found that rhesus
monkeys do not respond to inequity until approx-
imately 2.5 years of age, indicating a similar
developmental trajectory as is seen in humans
(Hopper et al., 2013). Finally, we need additional
evidence in other animals to help clarify the link
between cooperation and inequity, and to better
explore the contexts under which reactions to
inequity occur.

While inequity responses are not developed
to the same degree in other species as in humans,
these comparative data are essential in our
understanding of how our own sense of fairness
evolved. Collectively, the evidence on inequity
responses to date best support the hypothesis
that the negative response to inequity is a conver-
gent trait that most likely emerged in tandem
with cooperation, as a mechanism to compare
one's own outcomes with that of another.
Moreover, inequity responses vary, indicating
context specificity. This comparative approach
was initially informed by our understanding of
human behavior in the face of inequity, and we
are now at a place where the nonhuman data can
in turn further our understanding of our own
behavior.

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Morality and Justice

22

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Morality and justice have apparent similarities. Both facilitate social interaction, coordination, and cooperation. Both can feel like external standards that somehow should carry more weight than individuals' preferences. That said, morality and justice are not synonymous. Scholars as far back as Aristotle have identified ways that morality and justice differ (see Konow, 2008). In this chapter, we review research programs from the literatures on moral development, the social psychology of justice, and the burgeoning social psychological literature on adult morality and examine how scholars have conceptualized the relation between morality and justice. We review these literatures in roughly chronological order to illustrate how theorizing and research about morality and justice has changed over time.

We find a great deal of variability in how theorists have approached links between morality and justice. Some treat them as the same construct (e.g., classic theories of moral development; Piaget, 1932/1997; Kohlberg, 1981). Others view morality as one of several possible motivations for justice (e.g., Folger, 2001; Skitka, 2003). Still others argue that justice is merely one component of morality (e.g., Haidt & Joseph, 2004). The goals of this chapter are therefore to (a) review these different perspectives on morality and justice, and (b) offer constructive critiques and identify ways that these theories might inform each other. We conclude that three separate literatures converge on the basic idea that morality and justice are distinct but related constructs. However, no consensus exists regarding more specific aspects of the relation between the constructs.

22.1 Moral Development and Justice

22.1.1 Classic Theories of Moral Development

Justice has had a long and deep connection to theory and research on moral development, beginning with Jean Piaget's focus on the moral lives of children as revealed through games and play. He observed that children's games are dominated by concerns about fairness (Piaget, 1932/1997). In early years, children are very concerned about following the rules, but they also begin to understand that rules are relatively arbitrary as they develop. Finding ways to coordinate

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play to facilitate group function becomes more important than the rules themselves. Piaget therefore came to view moral development as the result of interpersonal interactions through which people find solutions all will accept as fair (Piaget, 1932/1997).

Kohlberg (1981) embraced and elaborated on Piaget's conclusion that moral development is rooted in justice. Kohlberg described the stages of moral development in a variety of ways, but one clear way he thought they differed was in the motivation that drives justice judgments. In Stages 1 and 2, people do little more than seek to avoid punishment and obtain rewards. Their conceptualization of justice is mainly defined by self-interest. At Stages 3 and 4, people begin to consider others' expectations for their behavior and the implications of their behavior for society as a whole. They show concern for other people and their feelings, follow rules in an effort to be seen as a good person, and feel an obligation to contribute to the group, society, or institution. At Stage 5, people define justice in terms of upholding people's basic rights, values, and the legal contracts of society. People at this stage understand social life is a social contract to abide by the laws for the good of all and to protect the rights of the individual and the group. Finally, at Stage 6, people believe that laws or social agreements are valid only if they are based on universal principles, and their justice judgments are motivated by concerns about self-condemnation rather than social approbation. In short, people become increasingly able to take into account the perspectives of others as they progress through the stages, and the source of moral motivation shifts from outside (i.e., heteronomy) to inside the individual (i.e., autonomy).

Although Kohlberg's theory was enormously influential, it nonetheless has a host of problems. For example, people seldom give responses to moral dilemmas that can be completely encapsulated or described by any single Kohlbergian stage. The theory also has been criticized for championing a Western worldview and being culturally insensitive (e.g., Simpson, 1974; Sullivan, 1977), and sexist in both its construction and interpretation of morality (Gilligan,

1982). There also have been many critiques of the evidence that Kohlberg tried to mount in support of the notion that moral development occurs in universal ordered stages (e.g., Simpson, 1974; Sullivan, 1977).

22.1.2 Contemporary Theories of Moral Development

Contemporary theories of moral development have adapted some components of Kohlberg's ideas, but have dropped its most controversial aspects, including normative claims that some stages of moral development and reasoning are better or worse than others. Ties between moral development and justice operations remain, but the emphasis on justice is not as strong in contemporary theories of moral development as they were in Kohlberg's writing about the topic. Next, we review two of these contemporary theories: Moral schema and domain theory.

Moral schema theory. Moral schema theory reconceived Kohlberg's stages as cognitive schemas (Rest, Narvaez, Bebeau, & Thoma, 1999a, 1999b). According to this theoretical update, people use three kinds of schemas to make sociomoral judgments: personal interest, norm maintenance, and post-conventional. The personal interest schema develops in early childhood, the norm maintenance schema develops during adolescence, and the post-conventional schema develops in late adolescence and adulthood. Once formed, people can use any one of the schemas to guide their judgments and behavior, and theoretically can move fluidly between them as a function of how well features of situations and social relationships map onto and therefore prime the activation of one or another core schema.

When people apply the personal interest schema, they tend to focus on their own self-interests in a situation or justify the behavior of others in terms of their perceptions of others' personal interests. The norm maintenance schema focuses on (a) the needs of cooperative social systems and the group, (b) a belief that living up to these norms and standards will pay-

off in the long run, and (c) a strong duty orientation, whereby one should obey and respect authorities. Finally, the post-conventional schema primes a sense of moral obligation based on the notions that laws, roles, codes, and contracts facilitate cooperation. However, people also recognize that these standards are relatively arbitrary, and there are a variety of social arrangements that can achieve the same ends. This schema leads people more toward an orientation that duties and rights follow from the greater moral purpose behind conventions, not from the conventions themselves. Post-conventional thinking therefore focuses people on ideals, conceptions of the ultimate moral good or imperative (Rest et al., 1999a). Although moral schema theory does not explicitly reference justice or justice operations, Rest et al. (1999a, 1999b); Rest, Narvaez, Bebeau, and Thoma (1999b) nonetheless emphasize that their theory is fundamentally about justice: "We still agree with Kohlberg that the aim of the developmental analysis of moral judgment is the rational reconstruction of the ontogenesis of justice operations" (Rest et al., 1999b, p. 56).

Domain theory. Domain theory was proposed as an alternative view of moral development as criticism of Kohlberg's theory began to mount. A key observation that helped launch domain theory was that people, even young children, differentiate between actions that harm innocent people and those that break rules but do not harm anyone (Turiel, 1983; see also Nucci & Turiel, 1978; Smetana, 1981). Based on growing support for the distinction between transgressions that do versus do not harm someone, Turiel surmised that two distinct systems underlie people's judgments of social events; a system focused on morality and another on social convention.

Domain theory defines morality as conceptions of rights, fairness, and human welfare that depend on inherent features of actions (Turiel, 1983). For example, punching a stranger in the face for no reason is wrong because it hurts someone, not because it violates a law, social rule, or custom. Social conventions, in contrast, are rules that a particular group has adopted to create and maintain order within the group. Conventions are arbitrary in the sense that they depend on group norms and practices rather than intrinsic features of the actions they govern. For example, greeting someone with a handshake or by showing them the back of your hand with just your middle finger extended is only meaningful in a particular society that has established rules about those actions. Other societies have established different practices for greetings that are equivalent in terms of how they regulate interpersonal interactions (e.g., kisses on the cheek, flicking your hand under your chin); nothing about these actions in-and-of-themselves is inherently right or wrong. In sum, morals and conventions both establish permissibility or impermissibility and create social order, but conventions depend on group context whereas morals are viewed as more universal. In domain theory, as in formalist ethics, morals (a) are not based on established rules (i.e., rule contingency), (b) prohibit rules that would sanction undesirable actions (i.e., rule alterability), and (c) generalize to members of other groups and cultures (i.e., rule and act generalizability).

Supporting the notion that there is an important psychological distinction between the moral and conventional domains, people judge and punish moral transgressors more severely than those who break conventions (Smetana, 2006; Turiel, 1998). Additionally, moral rules do not depend on authorities. Children say that hitting and stealing are wrong, even if a teacher says it is okay (Nucci & Turiel, 1978; Smetana, 1981, 1984). Similarly, children endorse obedience to moral requests (e.g., to stop fighting) made by any person, including other children, but they only endorse obedience to norms (e.g., seat assignments) from legitimate authorities (Laupa, 1994). Domain theory therefore provides a clear account of when and why people sometimes are willing to break rules to achieve what is in their view a greater good. Moral rules supersede social conventions and provide both the motivation and the rationale that attempts to change the system requirement.

In summary, moral developmental theory began with the core assumption that morality and

justice operations were functionally the same psychological constructs. Although the emphasis on justice operations is less explicit in contemporary moral developmental theory than it was in Piaget and Kohlberg's work, these theories nonetheless continue to assume that justice and morality are either very deeply connected if not the same psychological construct. Integrating the domain theory distinction between morality and convention with social psychological theory and research on justice, however, suggests the connections are not as deep as these theorists might believe—an issue we revisit in the concluding section of this chapter.

22.2 Morality from the Perspective of Justice Theory and Research

Justice theory and research evolved almost entirely independently of theory and research in moral development. Moral development theory and research was focused on improving childhood education. Justice theory and research, in contrast, was initially motivated by a desire to understand the factors that affect satisfaction with promotion decisions and wages, and the implications of just or unjust treatment on worker productivity (e.g., Adams, 1965; Stouffer, Suchman, DeVinney, Star, & Williams, 1949). Early justice theory and research focused largely on questions of distributive justice, that is, how people believe the benefits and burdens of social cooperation should be distributed. Theories of distributive justice generally assume that people approach life as a series of negotiated exchanges, and that human relationships and interactions are best understood by applying subjective cost-benefit analyses and comparisons of alternatives. Although based on an assumption that people are rationally self-interested, these theories also propose that properly socialized persons learn that to maximize rewards in the long run, they need to understand and adhere to norms of fairness in their relationships with others (e.g., Walster, Walster, Berscheid, & Austin, 1978).

In the early 1980s, justice theory and research shifted from a dominant focus on distributive justice to consider the role that procedures play in people's conceptions of fairness, with a corresponding shift in assumptions about the motives that drive people's concern with fairness. Procedural justice theorists posited that people's concern about being fairly treated is driven more by relational motives, such as needs to feel valued, respected, and included in important groups, than it is by material self-interests (e.g., Lind & Tyler, 1988; Tyler & Lind, 1992). Both the quality of decision-making procedures and the quality of interpersonal treatment provided by decision-making authorities, provide individuals with important information about their status and standing within a group (Blader & Tyler, 2003).[1]

Morality as a consideration or motivation that shapes people's justice reasoning is a relatively new development in justice theorizing and research. Some of this work connects with the historical focus of justice research on questions of distributive and procedural justice, and some of it does not, but each of these perspectives nonetheless posit that morality—and not only self-interest or relational needs—plays a role in how people think about fairness.

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[1] Some scholars consider interpersonal treatment a dimension of procedural justice (e.g., Blader & Tyler, 2003), others argue that interpersonal treatment from those who implement procedures is a separate construct termed interactional justice (Bies, 2005; Bies & Moag, 1986). Meta-analyses indicate that interactional justice and procedural justice are highly overlapping but nonetheless distinguishable constructs (Cohen-Charash & Spector, 2001; Colquitt, Conlon, Wesson, Porter, & Ng, 2001). For example, people tend to experience higher levels of interactional justice when decision makers provide justifications and explanations for outcomes compared to when they do not, irrespective of the decision-making procedures used to generate the outcomes. Although theorists suggested from the outset that poor treatment can prompt moral outrage (Bies, 1987), the potentially unique link between moral motivation and interactional justice has only recently begun to be emphasized and articulated in detail (e.g., Spencer & Rupp, 2009).

22.2.1 Moral Exclusion and the Scope of Justice

The scope of justice is defined as the boundary condition on when morality and justice are perceived as applicable concerns: Moral rules and justice considerations only theoretically apply to those psychologically included in people's scope of justice (Opotow, 1990). Moral exclusion, a related concept, refers to the entities (e.g., individuals, groups of people, or animals) that are excluded from people's scope of justice and therefore not considered as having the right to fair or moral treatment (Opotow, 1995).

Theory and research on the scope of justice has its roots in evidence that people are relatively hard wired to sort others into categories of "us" versus "them" (Deutsch, 1990). Categorizing entities in this way corresponds with a tendency to see people within one's group (and therefore scope of justice) as good, and those outside of it as less so (e.g., Tajfel, Billig, Bundy, & Flament, 1971). The consequences of moral exclusion theoretically range from mild kinds of micro-aggression (e.g., verbal or behavioral indignities; Sue, Bucceri, Lin, Nadal, & Torino, 2009) to much more harmful forms of exclusion, including extermination, genocide, slavery, or mass internments (e.g., DeWind, 1990; Nagata, 1990, 1993; Staub, 1990). Consistent with scope of justice predictions, people are less likely to support social policies designed to help excluded groups (Beaton & Tougas, 2001; Opotow, 1994; Singer, 1996), more likely to deny excluded groups legal procedures and rights (Boeckmann & Tyler, 1997), and more likely to express apathy when they witness negative treatment of excluded than included groups (Brockner, 1990; Foster & Rusbult, 1999).

Although the notion that people maintain a scope of justice has been generative, it has not escaped constructive criticism. Among other issues, there is not agreement that justice and morality are functional equivalents, or if instead, justice is only one aspect of morality or ethics (Hafer & Olson, 2003). Although Opotow and others treat these concepts as relatively interchangeable, it might be preferable to narrow the "scope of justice" term to concerns about fairness, rather than all of morality. In addition, there is confusion about whether the scope of justice should be conceptualized as a dichotomous (in which case targets are either in or out of the scope) or continuous variable (in which case exclusion can range from mild to severe, Hafer & Olson, 2003). The scope of justice concept also implies that if someone is "inside the scope," then they get positive treatment, whereas if they are outside the scope, they do not. What this conceptualization ignores is the possibility that entities—regardless of whether they are included or excluded from perceivers' scope of justice—can vary in whether they are perceived as deserving positive or negative treatment (Hafer & Olson, 2003).

22.2.2 The Functional Pluralism Model of Justice

The functional pluralism model of justice attempts to integrate moral concerns into how people think about questions of procedural and distributive justice. According to the functional pluralism model of justice (Skitka, 2003; Skitka, Aramovich, Lytle, & Sargis, 2009; Skitka & Wisneski, 2012), the adaptive challenges people confront in their everyday lives require the ability to move fluidly between different goal states or motives. For example, people have to resolve the problems of (a) competing for scarce resources, such as wages or jobs (the economist), (b) how to get along with others and secure their standing in important groups (the politician), and (c) building a meaningful sense of existence (the theologian).[2] In short, the functional pluralism model's position is that people are intuitive economists, politicians, *and* theologians. Which homunculus is piloting the ship at any given time (so to speak), depends on the current goal orientation of the actor and the salience of various situational cues that could activate one or another of these mindsets.

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[2] Other mindsets or perspectives that can influence perceptions of fairness are the intuitive scientist and prosecutor (see Skitka & Wisneski, 2012 for a review).

The intuitive economist. People take the perspective of an intuitive economist when situations prime a materialistic mindset. According to the functional pluralism model of justice, material goals and concerns are most likely to be activated when (a) there is a possibility of material gain, (b) the relational context is defined in market terms, and (c) other goals are not particularly salient. Contexts that prime the intuitive economist therefore include negotiations for goods and services, purchases, investments, and other contexts in which the primary goal is material exchange.

When the intuitive economist, or materialistic mindset is activated, people define equitable outcomes as more fair than outcomes distributed equally or on the basis of need (e.g., Deutsch, 1985), a finding that is robust across cultures (Fiske, 1991). They also become physiologically distressed at either inequitable underpayment or overpayment, and adjust their level of effort and productivity to restore equity (see Walster et al., 1978 for a review). Although no research to our knowledge has studied the degree to which an intuitive economist mindset affects perceptions of procedural justice, there are some logical possibilities. For example, intuitive economists should be especially concerned about consistency, for example, that pricing rules or compensation guidelines are applied in the same way irrespective of who is purchasing the goods or performing the service. Given that voice effects on procedural fairness are explained to some degree by the instrumental benefits of process control (e.g., Lind, Kanfer, & Earley, 1990), people in an intuitive economist mindset might also be especially sensitive to opportunities for voice, but primarily for instrumental rather than noninstrumental reasons.

The intuitive politician. When situations activate an intuitive politician mindset, people are motivated to achieve and maintain a position to influence others, to accumulate the symbols, status, and prestige associated with influence and power, and seek approval from the social groups and individuals to whom they are accountable (Tetlock, 2002). Intuitive politicians' motivation is rooted in "the knowledge that one is under the evaluative scrutiny of important constituencies in one's life who control valuable resources and who have some legitimate right to inquire into the reasons behind one's opinions or decisions. This knowledge activates the goal of establishing or preserving a desired social identity vis-à-vis these constituencies" (Tetlock, 2002, p. 454).

The functional pluralism model predicts that people are more likely to take the perspective of the intuitive politician when: (a) their material needs are at least minimally satisfied, (b) their needs for belongingness, status, and inclusion are not being met or are under threat, (c) the potential for significant relational losses or gains are made especially salient, (d) the dominant goal of the social system is to maximize group harmony or solidarity, (e) people's interdependency concerns are primed, and (f) accountability demands are high (Skitka, 2003; Skitka & Wisneski, 2012).

Consistent with the idea that the goals associated with the intuitive politician perspective influence people's reasoning, people care more about procedures and interpersonal treatment than material outcomes when (a) social identity needs are particularly strong, (b) perceivers are of low rather than high status, (c) status concerns are primed, and (d) they are high rather than low in interdependent self-construal and interdependent self-construal is activated (see Skitka & Wisneski, 2012 for a review). In a related vein, people are more likely to accept negative or unfavorable material outcomes when they are the result of fair rather than unfair procedures (the "fair process effect," e.g., Folger, 1977), in part because these procedures convey information about belongingness (e.g., De Cremer & Alberts, 2004) and respect (Lind & Tyler, 1988; Tyler & Lind, 1992). In short, people sacrifice material interests to serve social identity needs and goals, when social identity needs are more salient than material ones.

Variables related to social identity also influence people's judgments of distributive justice. For example, people primed with solidarity and group harmony goals, who are chronically higher in communal or interpersonal orientation, or who take a group rather than an individual level perspective, are more likely to allocate material rewards equally than equitably, and to rate equal allocations as more

fair than equitable ones. Other research indicates conceptions of fairness vary as a function of the social role of the perceiver. For example, when one's social role as a parent is more highly activated, one is more likely to perceive allocations based on need as fairer than those based on equity or equality (see Skitka & Wisneski, 2012 for a review).

The intuitive theologian. People adopt an intuitive theologian mindset when they are motivated more by concerns about morality and immorality and questions of the greater good than by either their social standing or material self-interest. People should be more likely to use a moral frame of reference for evaluating fairness when (a) their material and social needs are minimally satisfied, (b) they have a moral conviction about the outcome being decided (e.g., whether abortion is or is not legal); (c) moral emotions are aroused, such as moral outrage, guilt, or shame; (d) there is a real or perceived threat to people's conceptions of morality (not just normative conventions), (e) people's sense of personal moral authenticity is questioned or undermined, or (f) people are reminded of their mortality (Skitka, 2003; Skitka, Aramovich et al., 2009; Skitka & Wisneski, 2012).

Consistent with these hypotheses, people are more likely to believe that duties and rights follow from the greater moral purposes underlying rules, procedures, and authority dictates, than from the rules, procedures, or authorities themselves when they have a moral investment in outcomes (Skitka, Bauman & Lytle, 2009; see also Kohlberg, 1976). Moral beliefs are not by definition antiestablishment or anti-authority; they just are not dependent on establishment, convention, rules, or authorities. Instead, when people take a moral perspective, they focus more on their ideals, and the way they believe things "ought" or "should" be done, than on a duty to comply with authorities. When people have moral certainty about what outcome authorities and institutions should deliver, they do not need to rely on standing perceptions of legitimacy as proxy information to judge whether the system works—in these

cases, they can simply evaluate whether authorities get it "right." "Right" decisions indicate that authorities are appropriate and work as they should. "Wrong" answers signal that the system is somehow broken and is not working as it should. Consistent with these ideas, people's fairness reasoning is driven more by whether authorities get it "right" than by whether authorities provide opportunities for voice, respect the dignity of those involved, or otherwise enact procedural fairness when people have a moral investment in decision outcomes (e.g., Bauman & Skitka, 2009; Skitka, 2002; Skitka & Houston, 2001; Skitka & Mullen, 2002; Skitka, Aramovich et al., 2009; Skitka, Bauman & Lytle, 2009).

In summary, theories of procedural and distributive justice have emphasized materialistic and social motivations underlying justice and ignored or dismissed the possibility that people's conceptions of fairness might connect to underlying moral motives. Justice theory and research has been preoccupied with which of these two motives—materialistic/egoistic motivation versus social identity and belongingness—best explains people's reasoning about procedural and distributive fairness. A working definition of justice and what it means to people, however, could just as reasonably start with morality, righteousness, virtues, and ethics rather than with self-interest, belongingness, or other nonmoral motivations. The functional pluralism model of justice treats materialistic and social identity concerns as valid motivations that can contingently influence how people think about fairness (instead of framing these as competing theoretical alternatives), but it also recognizes that moral concerns sometimes shape people's fairness reasoning as well.

22.2.3 Fairness Theory and the Deonance Approach

Fairness theory focuses less on questions of procedural and distributive fairness, and more on people's reactions to transgressions. Fairness theory posits that justice is fundamentally about

accountability and the assignment of blame in response to counter-normative outcomes and interpersonal conduct (Cropanzano, Byrne, Bobocel, & Rupp, 2001; Folger & Cropanzano, 1998, 2001; Folger, Cropanzano, & Goldman, 2005). According to the theory, perceived fairness depends on people's answer to three central questions: (a) *Would* the situation have turned out better if things were done differently? (b) *Could* the actor have behaved differently? (c) *Should* the actor have behaved differently? That is, "would" judgments assess whether something negative occurred by considering counterfactual alternatives as reference points. "Could" judgments determine whether the actor realistically could have chosen a different course of action. "Should" judgments ascertain whether the actor violated moral or ethical standards. In short, people judge fairness by comparing aspects of events associated with accountability to counterfactual alternatives.

The "should" component of fairness theory explicitly links justice and morality. It argues that perceived transgressions of moral norms for interpersonal conduct—the product of "should" judgments—arouse deonance, a motivational state akin to reactance and dissonance (Folger, 1998, 2001). Deontic responses have at least five important attributes that distinguish them from other responses to unfairness (Folger et al., 2005). Deontic responses often involve rapid evaluations of situations that alert perceivers to injustice. Although people can and do consciously deliberate about justice, initial appraisals of unfairness can arise from automatic attribution processes that detect and categorize stimuli as negative for the perceiver. Deontic responses do not always serve individuals' self-interest and often include strong emotions, especially anger and hostility that drive behavioral responses. Furthermore, deontic responses prompt a desire for retribution. Rather than seek compensation for the losses they incurred, aggrieved persons can be motivated to restore justice through punishment or other means perceived to decrease the likelihood of future violations (e.g., Skarlicki &

Rupp, 2010). However, deontic responses also include opportunities for social reconciliation, which open the door to future interactions once a situation has been satisfactorily resolved. Taken together, these aspects of the deontic approach highlight a facet of the way people experience injustice that has been absent from many theories of justice.

In summary, fairness theory attempts to integrate and organize theory and research on moral judgment with justice, and proposes the social cognitive and emotional processes that may underlie when, why, and how people judge and react to unfairness. Empirical research that formulates and tests specific hypotheses derived from fairness theory has recently gathered momentum (e.g., Umphress, Simmons, Folger, Ren, & Bobocel, 2012), but as with any relatively young theory, there are many areas of fairness theory that remain untested, unaddressed, and underspecified. For example, fairness theory currently has only addressed negative events, that is, people's responses to perceived transgressions. Although the theory may ultimately be extended to explain people's reactions to positive events (Folger & Cropanzano, 2001), asymmetries in how people process positive and negative events are likely to complicate this effort (e.g., Baumeister, Bratslavsky, Finkenauer, & Vohs, 2001). Therefore, fairness theory provides a broad framework for understanding justice judgments in the context of transgressions that may provide increasing utility as it continues to develop.

22.3 Justice from the Perspective of Theory and Research on Adult Morality

Justice theorists are not alone in their recent interest in morality; in recent years other social psychologists have also become fascinated by morality. We turn next to how social psychologists interested in morality have made connections with psychological concerns with justice.

22.3.1 Moral Foundations Theory

Moral foundations theory (MFT) incorporates concerns with justice as part of a larger pluralist theory of morality. Drawing on similarities between works in anthropology (e.g., Fiske, 1992; Shweder, Much, Mahapatra, & Park, 1997), and evolutionary theories of human sociality, Haidt and colleagues proposed MFT (Haidt & Joseph, 2004, 2007; Haidt & Graham, 2007; see Graham et al., 2013 for a review) to explain variation in morality across (sub)cultures. In particular MFT argues that there is a small set of innate "foundations" upon which cultures construct their moral systems. Thus, MFT argues some aspects of morality are organized in advance of experience (Marcus, 2004), but nevertheless get revised during childhood through cultural practices and experiences. The revision process accounts for the diversity of moralities witnessed across cultures and across groups within a culture (Graham, Haidt, & Nosek, 2009).

MFT asserts that there are at least five moral foundations: (1) Harm/care, (2) Fairness/reciprocity, (3) In-group/loyalty, (4) Authority/respect, and (5) Purity/sanctity (Graham et al., 2013). The harm/care foundation underlies virtues of kindness, generosity, and nurturance and evolved from our ability to feel the pain of others. The fairness/reciprocity foundation underlies ideas of justice, rights, equity, and autonomy and is related to the process of reciprocal altruism. The in-group/loyalty foundation underlies the virtue of self-sacrifice for the group and values such as loyalty and patriotism; it evolved in response to our ancestors' ability to form shifting coalitions. The authority/respect foundation underlies the virtues of obedience to legitimate authorities and respect for tradition; it evolved from our history of hierarchical social interactions. Finally, the purity/sanctity foundation underlies ideas about religiosity and how the body can be desecrated by contaminants and impure activities; it evolved from disgust mechanisms that protect the body. Notably, Haidt and colleagues believe that several additional foundations may exist, including but not limited to Liberty/oppression, Efficiency/waste, and Ownership/theft (Graham et al., 2013).

To date, however, empirical research on additional candidates for "foundationhood" has focused mainly on Liberty/oppression, which underlies the negative reactions people have to individuals or institutions that meddle in the lives of others (see Iyer, Koleva, Graham, Ditto, & Haidt, 2012).

The harm and fairness foundations are individualizing foundations (in which individuals are the locus of moral value, and concerns with autonomy and protecting individuals' rights are paramount), whereas in group, authority and purity are binding foundations (in which the group is the locus of moral value, and concerns with loyalty, duty, and self-control are paramount; Graham et al., 2009). Haidt and colleagues argue that most research in moral psychology has tended to focus on the individualizing foundations, and has neglected the other foundations.

Much of the research on MFT has been applied to understanding ideological disagreements between liberals and conservatives (and of late, libertarians). In particular, Haidt and colleagues have argued that liberals endorse the harm and fairness foundations more than the other foundations, whereas conservatives tend to endorse all five foundations more equally (Graham et al., 2009; Haidt & Graham, 2007); both groups equally endorse liberty (Graham et al., 2013). Thus, according to MFT, the root of some ideological disagreements rests in the fact that conservatives endorse moral principles that liberals don't recognize as moral (Haidt & Graham, 2007). MFT and moral motives theory (reviewed later in this chapter) together suggest that justice researchers may have missed an important moderator of how people judge fairness, specifically, the political orientation of the perceiver.

Although MFT has generated a lot of research in the short time since its original formulation, it has also been subject to criticism (for a review see Graham et al., 2013). In particular, MFT has been criticized for lacking conceptual clarity on what constitutes a foundation and for not providing enough evidence that moral intuitions are in fact innate (Suhler & Churchland, 2011). Some scholars reject its pluralist perspective and argue

that all morality comes down to the dimension of harm (Gray, Young, & Waytz, 2012). Others argue that only the harm and fairness dimensions are truly moral, and the other foundations represent conventional beliefs (e.g., Jost, 2009). Still others criticize MFT for missing vital elements of morality (see Janoff-Bulman's work reviewed below) or for not paying enough attention to the relational context in which concerns about morality arise (Rai & Fiske, 2011). The authors of MFT acknowledge these criticisms in their recent writings and discuss ways that MFT could address these criticisms in future research (Graham et al., 2013).

In summary, MFT argues that concerns about harm and justice (which have been the dominant focus in the literatures on moral development and the social psychology of justice) are only two foundations on which morality is built. By drawing our attention to other possible foundations of morality (e.g., authority), MFT has highlighted that justice and morality are not identical concepts because concerns about justice and harm are only part of the larger pie of morality.

22.3.2 Relational Models Theory and Moral Relationship Regulation

The relationship regulation approach to morality posits that people derive their standards for morality and justice from their understanding of the social relationships within specific situations (Rai & Fiske, 2011). According to this perspective, moral principles do not exist independent of the social-relational contexts in which they operate. Instead, moral concepts such as harm, equality, or purity are situationally determined as a function of the type of social relationship a given situation involves. Diversity in moral thought, feelings, and actions therefore is not the product of erroneous recognition of moral facts but a legitimate consequence of how different people interpret social situations and implement a finite set of schema about the nature of a given relationship.

Social relationships generally fit one of four basic relational models: communal sharing, authority ranking, equality matching, and market pricing (Fiske, 1991, 1992; see also Haslam, 2004). How people define fairness and morality therefore depends on the relational system. In communal sharing relationships, all people within a given group (e.g., a family) hold equivalent and undifferentiated status and can expect equal access to resources, but the same is not true for outsiders. The authority ranking model provides organization within a group by introducing asymmetry among members according to ordinal positions that indicate linear patterns of dominance and deference. In equality matching relationships, people seek to balance their outcome relative to others' in terms of both valence and magnitude along one dimension at a time (e.g., effort). In market pricing relationships, people take into account a wide array of disparate dimensions of comparison and combine them along a common metric (often money) into a single ratio that facilitates complex comparisons and exchanges. The four basic relational models help people anticipate and coordinate behavior, evaluate interactions and exchanges, and identify transgressions.

Each relational model prescribes the basis for moral motivation and judgment that people use to derive appropriate standards of conduct given the nature of the relationship between the individuals involved (Rai & Fiske, 2011). Unity is the principal moral motive in communal sharing relationships. People in communal sharing situations are expected to take care of their own. They ought to satisfy any in-group members' unmet needs, experience threats to individual members of the group as a threat to the group as a whole, and protect the integrity of the group from both internal and external disruptions. Hierarchy is the principal moral motive in relationships characterized by authority ranking. People expect inequality in these situations; lower ranking individuals claim fewer resources and have a duty to support and defer to higher ranking individuals. Higher ranking individuals, in contrast, claim more resources but are obligated to lead and look after lower ranking individuals.

Equality is the principal moral motive in the equality matching model. In relationships characterized by equality matching, people strive to provide equal opportunities or outcomes through processes such as turn taking, in-kind reciprocity, and lotteries in which each person has the same opportunity to be chosen. Finally, proportionality is the principal moral motive in market pricing relationships. When market pricing applies, people monitor multiple inputs and outputs simultaneously and ensure that rewards and punishments are equitable. Taken together, the relational regulation approach integrates a wide array of perspectives, including prior research on care (e.g., Opotow, 1990), authority (e.g., Tyler & Lind, 1992), and multiple distributive justice criteria (e.g., Deutsch, 1985). By doing so, it provides a comprehensive and contingent theory of when and why moral rules and motives vary across situations and individuals.

From the perspective of relational models theory, moral conflict is largely the result of disagreement over implementation rules that specify when, how, and to whom each relational model applies (Fiske, 1991, 1992; Fiske & Tetlock, 1997). The relational models themselves are universal but abstract. Beliefs about how to operationalize the models to address specific situations and relationships vary across cultures, groups, institutions, ideologies, and individuals' familiarity with possible precedents. Consider, for example, a situation in which most people agree that the equality matching model fits. If one person does another a favor, everyone might agree that reciprocation is appropriate. In the absence of more precise implementation rules, however, it remains unclear how or when the favor should be reciprocated. Different interpretations of the ways to satisfy the requirements of a model can therefore lead to misunderstanding, disagreement, and conflict.

Disagreement over which model ought to apply to a given situation is less common than disagreement over implementation rules, but it tends to generate intense and intractable con-flict that is accompanied by moral outrage (Fiske & Tetlock, 1997). Tradeoffs that are relatively easy to make when viewed through the lens of one relational model can appear inappropriate—or even ghastly and unthinkable—when viewed through the lens of another. Goods and services, for example, are bought and sold every day, and the vast majority of these transactions are acceptable because people apply the market pricing model to such exchanges. When it comes to human organs, however, people often apply the communal sharing model, which causes them to view organ markets as taboo and morally repugnant. Somewhat similarly, friendships often operate under the equality matching model. If one couple invites another to their home for dinner, the appropriate response is to reciprocate at a later date. Offering to pay a sum that would cover the cost of dinner would be perfectly acceptable under the market pricing model (e.g., at a restaurant), but awkward and uncomfortable under the equality matching model in someone's home. In sum, relational models and the moral motives that accompany them facilitate social interactions, but conflict arises when people apply different implementation rules, or worse, a completely different model.

In summary, relational models theory and the moral relationship regulation approach provide a rich framework for understanding how and why morality and justice vary across situations, and it also explains when and why people sometimes moralize conflict and resist the type of tradeoffs that are necessary to resolve disagreements. The relational systems model is solidly grounded in interdisciplinary theory and empirical research about how people coordinate social relationships. However, it is presented at a level of abstraction that may make it difficult to formulate hypotheses about how the theory should apply in specific situations. Moreover, the theory allows that any given situation can simultaneously involve parts of each model, which may limit its utility or make it unfalsifiable. Therefore, greater specification of the theory is needed before it can be tested cleanly.

22.3.3 Moral Motives Model

Janoff-Bulman and Carnes (2013) moral motives model has been offered as an alternative to MFT and the relational models theory. Building on the scaffolding of theory and research on behavioral regulation and motivation (e.g., motives of approach and avoidance, and behavioral activation versus inhibition; e.g., Carver & Scheier, 1998), Janoff-Bulman and Carnes argue that morality fundamentally involves behavioral regulation to facilitate an optimized social existence. In particular, proscriptive moral regulation is focused on avoiding immorality or transgressions, and is inhibitory and protection oriented. In contrast, prescriptive morality is an approach motivation oriented toward providing rather than protecting.

In addition to arguing that morality engages these two motivational systems, Janoff-Bulman and Carnes (2013) argue that these moral motivations can play out at three different levels of analysis, specifically morality of the self, the other, and the group. At the level of the self, proscriptive and prescriptive moral motivations are associated with self-restraint and moderation on the one hand, and industriousness on the other. Other directed moral motivation is interpersonally directed, and is proscriptively focused on avoiding harm, and prescriptively focused on helping and fairness. Finally, the group-based or collective oriented moral motives are concerned with social order and communal solidarity when they are proscriptively oriented (e.g., status quo maintenance), and focused on social justice and community responsibility when they are prescriptively motivated. Similar to MFT, Janoff-Bulman and Carnes (2013) argue that liberals and conservatives differ in their moral motivations. According to this model, however, ideological differences are not classified around individuating or binding foundations, but are focused instead on differences in the motivational priorities of liberals and conservatives. Political conservatives' moral motivations are more likely to be proscriptively motivated, whereas political liberals' moral motivations are prescriptively motivated.

The moral concerns identified by MFT overlap to a considerable degree with the moral motives model, with one primary exception. MFT defines fairness in individuating terms—it describes microjustice (i.e., justice from the perspective of the individual). In contrast, moral motives theory differentiates between micro- and macrojustice, or justice at the level of the individual versus the collective, respectively.

Although the macro- or social justice component of moral motives theory has already proven to be somewhat controversial (see Graham, 2013 for a critique), it has strong empirical grounding in research that has revealed important differences between how people think about justice for individuals versus collectives (Brickman, Folger, Goode, & Schul, 1981). Individual justice focuses on person-specific variables, such as merit. Macrojustice (or what Janoff-Bulman & Carnes, 2013 called social justice) instead focuses on the shape of the outcome distribution writ large, such as the distribution of annual income of a given public. Discourse about growing income inequality is a concrete example of a macrojustice concern.

MFT also implies that liberals for the most part do not have a communal moral orientation. Moral motives theory challenges this idea, and argues that liberals do have communal moral concerns, they just are not captured well by the foundations of in-group, authority, and purity, which are largely described in proscriptive terms, which appeal to conservatives. In contrast, moral motives theory proposes that liberals' communal moral motivations are prescriptively oriented around concerns about social justice and communal responsibility, and not in-group, authority or purity.

Strengths of moral motives theory include its explicit grounding in psychological theory and research on motivation, as well as reinvigorating the important distinctions between micro- and macrojustice. Especially given recent public debate about issues such as income inequality, social class divisions in access to higher education, and various other macrojustice topics, how people reconcile conflicts between micro- and

macrojustice concerns will be an important area for future research.

22.4 Morality and Justice: The Same or Different Constructs?

This review highlights the considerable variability in the literature regarding how morality and justice are related. For Piaget and Kohlberg, morality and justice were viewed as essentially the same thing; more contemporary theories of moral development, however, have de-emphasized the links between morality and justice operations. Contemporary theories of morality differ from theories of justice in the kinds of connections they make between morality and justice. Moral foundations and moral motives theories, for example, posit that justice is merely one aspect among many that define the moral domain. Alternatively, recent theories of justice maintain that morality is one concern that underlies why people care about justice.

One way to help clarify the similarities and differences in the psychology of justice and morality may be to integrate the distinction domain theory makes between normative conventions and moral imperatives with justice theory and research. Specifically, it may be that people's conceptions of justice are often grounded more on conventional beliefs than moral imperatives. Consistent with this assertion, people tend to acknowledge and accept the idea that determinants of fairness can and should vary across situations, but they experience their moral beliefs and convictions as universally generalizable and objective truths (e.g., Goodwin & Darley, 2008; Morgan, Skitka, & Lytle, 2013). Moreover, researchers have identified a plethora of allocation norms and standards that are seen as differentially fair and appropriate in different contexts, relationships, or situations (e.g., Deutsch, 1985). A broad range of factors similarly shape perceptions of procedural fairness (e.g., Leventhal, 1980; Lind & Tyler, 1988) and the relative weight that people place on distributive versus procedural considerations when making fairness judg-

ments (e.g., Brockner et al., 1998; Skitka & Mullen, 2002; van den Bos, Wilke, Lind, & Vermunt, 1998). Furthermore, the claim that justice rules are more often based on normative conventions than moral imperatives is reinforced by the degree to which definitions of justice include not only informal norms, but also a host of formalized codes and guidelines that can vary across organizational structures or communities. Homeowners' associations, for example, generate very localized versions of their covenants; workplaces vary in their pay and benefit policies, and so forth. Although all homeowners' associations and workplaces (for example) will develop their covenants and policies in ways that ensure fairness (and therefore increase compliance), there is no one just set of rules, nor do people experience these rules as universally generalizable or objective truths.

In contrast, people do not generally accept and expect that their conceptions of morality are or should be contextually contingent or situationally variable, and are offended at the very idea that morality could be relative (e.g., Darwell, 1998; Smith, 1994). Even philosophers who reject the idea of moral objectivism (e.g., Mackie, 1977) nonetheless accept that people's commitment to the idea that there are objective moral truths is central to folk metaethics (i.e., people's beliefs and assumptions about the nature of morality).

In summary, our review of the rather disjointed literature on morality and justice leads us to tentatively conclude that morality and justice are distinct, but sometimes overlapping psychological constructs. Perceptions of justice are typically more negotiable and flexible than moral beliefs. Justice judgments also are at least as likely to be driven by nonmoral as moral concerns. That is, justice judgments often are made using what Rest et al. (1999a, 1999b) referred to as personal interest or norm maintenance schemas, or what Skitka and Wisneski (2012) labeled as the intuitive economist or politician mindsets. Justice only becomes moralized when it is based on post-conventional beliefs about fundamental questions of right and wrong, which unlike normative conventions, are nonnegotiable, authority independent, and autonomous.

Future theory and research will need to further develop and refine the ways in which morality and justice are similar and different. Important to this refinement will be (a) careful definition of terms, (b) deciding whether justice and morality describe judgments, behaviors, attitudes, motives, treatment, or outcomes (or all of the above), and (c) exploring the ways in which perspective may matter, that is, whether one is the recipient or target, a third-party perceiver, or the allocator or actor of justice and morality.

## 22.5	Conclusion

In summary, theories of moral development, morality, and justice evolved independently but have converged on the idea that justice and morality are inherently linked yet separate constructs. The relation between justice and morality is almost assuredly conditional; sometimes there is a high degree of overlap between justice and morality, but there are aspects of morality that have nothing to do with justice and aspects of justice that have nothing to do with morality. That said, little research has directly examined this space. Future research aimed at doing so has the opportunity to have a big impact because it may inform multiple literatures.

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Social Dynamics of Legitimacy and Justice

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At our university, when, after careful consultation and consideration, the College dean appoints a department chair, that faculty member knows that she: (1) has the support of the dean; and (2) most faculty members in her department "endorse" her candidacy as well. She is, in effect, legitimized as the occupant of a legitimate position. In the course of her term, she must make a number of decisions regarding the allocation of course assignments, travel and research funds, committee assignments, faculty raises, hiring in particular substantive areas, and the like. Faculty members judge how well she goes about making those decisions and the actual resulting resource distributions. Although they may personally disagree with some decisions, they may still judge them as at least within the purview of her role as chair, if not more generally as fair and beneficial to the department. In other instances, some faculty may contend that

her decisions are unfair and yet not challenge them, recognizing that their colleagues may not share their views. And, sometimes, when a chair repeatedly fails to consult faculty members, makes unilateral decisions that benefit her personally and only her closest collaborators, and also submits slipshod reports required by upper administration, department members may demand that the dean dismiss her. By claiming that she has imposed unjust practices on the department that have threatened the morale and compromised courses and scholarly production within it, they essentially undermine her legitimacy as chair.

Although the latter action may be rare in most academic settings, the example highlights the complex relationship between two fundamental principles relevant to interaction: legitimacy and justice. Implied in this example is that the dean appointed that particular faculty member because she had been observed to make judicious, fair decisions and treat her colleagues with respect. The example also suggests that legitimacy of the occupant of the chair position affects the interpretation and judgment of the chair's actions, with faculty members initially allowing leeway for some of her actions that they perceive as unjust. With concrete instances of legitimacy and justice, it is sometimes difficult to determine which of two existed first.

This chapter examines the relationship between legitimacy and justice in terms of social dynamics characterizing a variety of situations, particularly

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in organizational contexts, that sometimes represent justice processes as antecedent to legitimacy and sometimes as a consequence of them. Together, these two processes draw attention to the welfare not simply of individuals but of the collectivity—the organization or larger group—in which they are embedded. And in so doing highlight the stability of the social order, including the possibility of reproducing existing inequalities, and identify potential pathways for change. Essentially, legitimacy processes play a potentially important role in the evaluations and actions of low and high ranking members in stratified groups.

Here, we refer to legitimacy as the process through which patterns of behavior or a cultural/social object gain social support and approval (Johnson, Dowd, & Ridgeway, 2006; Zelditch & Walker, 1984). Legitimated rules and authorities, moreover, entail a perceived obligation to obey (Tyler, 2001; Zelditch & Walker, 1984). And, social justice pertains to "a state of affairs (either actual or ideal) in which (a) benefits and burdens in society are dispersed in accordance with some allocation principle…(b) procedures, norms, and rules that govern…forms of decision making [that] preserve the basic rights, liberties, and entitlements of individuals and groups; and (c) human beings…are treated with dignity and respect…" (Jost & Kay, 2010:1122).

In some respects, distributive, procedural, and interactional justice principles represent legitimated rules that govern individual- and group-level interactions. Such principles signify what people expect in their family and work lives, from their governments, and so forth. To the extent that individuals, especially those in authority positions, behave consistently with justice principles, they may ensure the perceived legitimacy of their actions and rules, as well as the structures in which they are embedded. For example, Tyler (1990/2006a) shows that when people judge the procedures used by legal authorities to be fair, they are more likely to perceive the authorities as legitimate and comply with their requests and decisions. Generally, when authorities treat rule violators with dignity and respect, offenders develop a greater appreciation for the normative order of the group, organization, or polity. Similarly, when managers distrib-

ute resources necessary for subordinates to do their jobs well in a fair and effective manner, they are more likely to be supported by both their superiors and their employees in their positions (Hegtvedt & Johnson, 2009). In these ways, justice processes fuel legitimacy.

In contrast, violations of those rule-based expectations may stimulate perceptions of injustice and responses to restore justice. Yet, for a variety of reasons, people disadvantaged by a distribution, a decision-making procedure, or interpersonal encounter may not attempt to address perceived injustice (e.g., Gaucher, Kay, & Laurin, 2010; Hegtvedt & Isom, 2014; Olson & Hafer, 2001). One key reason is that they believe or come to accept their outcomes or treatment—or the system that produced them—as legitimate. In such ways, legitimacy shapes justice processes.

Thus, the causal primacy of legitimacy or justice depends upon the nature of the existing context and recognition of what can be gained from social discourse by understanding the dynamic nature of their relationship. And, of course, in some situations, when perceived unfairness is pervasive and shared, dissent may brew among those disadvantaged leading to at least the desire for, if not actual, change and the emergence of the legitimacy of alternative rules, norms, authorities, or structural arrangements (see Walker, 2014).

In this chapter we examine this dynamic relationship between legitimacy and justice. Given that the preceding chapters have detailed aspects of social justice, here we begin by addressing the question: What is legitimacy? To respond conceptually to that question, we draw upon literatures in philosophy, sociology, and psychology. Then we present theoretical arguments and review empirical studies focused on the effects of justice on legitimacy and on the effects of legitimacy on justice. In doing so, we touch upon (but do not develop in depth owing to page constraints) issues of power. We conclude by noting the double-edged implications of legitimacy and justice for social change and by highlighting issues regarding additional processes (such as social comparisons and emotions) that may augment the dynamic between these two fundamental notions that serve to reinforce the fabric of society.

23.1 Conceptualizing Legitimacy

Sociological and psychological conceptualizations of legitimacy, not surprisingly, share some similarities owing to their common roots. Just as justice has a long history anchored in philosophical discourse, the notion of legitimacy also emerges in philosophical treatises (see Peter, 2010; Solomon & Murphy, 2000; Zelditch, 2001b). Philosophical forbearers largely focused on conceptualizations of political legitimacy, with emphasis on the state. In doing so, they raise, at least implicitly, issues of power and the means of ensuring justice for those served by the state. Social scientists have extrapolated from these state-focused arguments and focused more generally on the legitimacy of authorities and decision-makers at the organizational level.

As a social contractarian philosopher, Locke (1690/1990) argues that political legitimacy derives from the consent (implicit or explicit) of the governed and represents a foundation for subsequent discourse. He further contends that people who give their consent to the "social contract" (i.e., the authority of the state) are obligated to follow the state's laws. Rousseau (1762/1988) expands this argument, recognizing that consent may stem from several sources: private will, reflecting personal interests; a citizen's general will, considering interpretations of the common good; and the general will, constituting the common good (see Peter, 2010). To the extent that democratic decision-making reveals the general will, legitimacy emerges. Rousseau also argues that political legitimacy transforms power into state authority, bringing with it citizens' obligations to comply. While legitimacy ensures state functioning, he foreshadows a crisis of legitimacy when states employ their power in a manner that is harmful to its citizens. In such cases, what is legitimate may not be, in a broader sense, just and may stimulate the dissent as illustrated (on a much smaller scale) in the example of the department chair.

Modern philosophers also weigh in on legitimacy and its relationship to justice. Rawls (2001) addresses the crisis identified by Rousseau by arguing that "political power is legitimate only when it is exercised in accordance with a constitution (written or unwritten), the essentials of which all citizens, as reasonable and rational, can endorse in the light of their common human reason" (p. 41). Moreover, Rawls (1993) contends that political legitimacy stems from the fundamental notion of society as a "fair system of cooperation," involving free and equal citizens and, as detailed in his theory of justice regarding the establishment of fair distributions, a fair society (see Rawls, 1971, 2001). Like Rousseau, he too cautions that decisions made by state institutions may be legitimate but not necessarily just, recognizing that justice pertains to social and economic institutions and dynamics as well. Buchanan (2003) echoes this premise when he suggests that a political entity (e.g., a new state) may gain legitimacy from other states by demonstrating a "minimal internal justice requirement." Such a requirement involves indication that the entity protects the human rights of those over whom it wields power and that it had a right to come into existence (i.e., did not emerge through usurpation).

The philosophical approaches provide a backdrop to conceptualizing legitimacy and its relationship to justice in current social psychological works. The prescriptive approaches offered by Enlightenment-era social contractarian philosophers clearly resonate in the work of twentieth century sociologist Max Weber on legitimacy (1922/1968). And, the arguments of Rawls and Buchanan on the inherent role of justice processes regarding distributions, procedures, and treatment in shaping legitimacy parallel developments in social psychology in recent decades.

Weber's (1922/1968) exposition on "what makes a social order legitimate" highlights both consent and obligation to comply as Locke suggested, and recognizes, as Rousseau did, that individuals may have interests distinct from the common good. Weber argues that even though individuals may differ in their beliefs and values, they come to behave in a manner consistent with the rules of a given social order because they presume that others accept the rules as well. To the extent that they perceive that others support the

social order, the order itself becomes an appropriate, objective feature of social life. Thus, legitimation involves a collective social process that engages social actors who come to develop cognitions that a social object (e.g., a rule, an authority, a procedure, a distribution, a political polity) is valid and objective. By acting in accord with the legitimated rules, individuals exhibit compliance and reinforce normative behavior, even if doing so contrasts with their personal habits, beliefs, or interests.

Building on Weber's core argument, sociologists Dornbusch and Scott (1975) distinguish "propriety," representing personal beliefs about the desirability and appropriateness of a social order's norms and procedures, from "validity," signifying collective consensus regarding such matters. Validity perceptions stem from observations that others occupying positions of authority support the norms and procedures (i.e., authorization) or that peers offer such support (i.e., endorsement). Authorization and endorsement, respectively, lead individuals to feel obligated to obey the social order's norms and procedures even in the absence of personal approval of them. Thus, in effect, "validity" of a social order trumps individuals' beliefs of its impropriety (see Zelditch, 2006). Extending the example opening this chapter, even though some faculty members may disagree with a chair's decision to seek positions in a particular area, they may recognize that others support the chair's prerogative to shape hiring decisions and that the designated areas are ones in which graduate students may find jobs, which could benefit the department in the long. Developments of the effects of legitimacy on justice processes, detailed below, take Dornbusch and Scott's elaborated Weberian approach as a starting place for their analyses.

Weberian ideas on legitimacy also typify work in psychology. Tyler (2006b) defines legitimacy as "the belief that authorities, institutions, and social arrangements are appropriate, proper, and just" (p. 376). Although his proffered definition conflates legitimacy and justice, like Weber he specifies that "when [legitimacy] exists in the thinking of people within groups, organizations, or societies, it leads them to feel personally obli-

gated to defer to those authorities, institutions, and social arrangements" (Tyler 2006b, p. 376). He anchors current discussions of legitimacy to the history of the study of the dynamics of authority in psychology. Kelman (2001) reinforces this foundation by noting that "the authority's ability to exert influence depends on his or her perceived legitimacy" (p. 55). As described further below, Tyler's theoretical approach to legitimacy (Tyler, 1990/2006a, 2001, 2003, 2010) focuses on the legitimacy of authorities. His theorizing emphasizes how legitimacy emerges from the extent to which authorities employ fair procedures or, in other words, how justice processes shape the emergence of legitimacy.

Additionally, psychologists examine the extent to which a set of beliefs legitimizes a social order, an authority, a distribution of wealth, and the like. Hafer and Sutton (2016, Chap. 8 of this handbook; Lerner, 1980) suggest that belief in a just world dictates that people's outcomes are deserved because of who they are or what they do. Such a belief leads individuals to justify their own lower outcomes and legitimize lower outcomes to others as undeserved. Consequently, people fail to respond to what otherwise might be seen as personal and third-party injustices. Beyond individual outcomes, sets of beliefs justify existing systems of distribution or decision-making. In discussing justice and politics, Jost and colleagues (Jost, Banaji, & Nosek, 2004; Rothmund, Becker, & Jost, 2016, Chap. 15 of this handbook) review system justification theory, which proposes people are motivated "to rationalize away the moral and other failures of our social, economic, and political institutions and to derogate alternatives to the status quo" (Jost & Kay, 2010:1148). That motivation propels individuals to rely upon conscious or unconscious stereotypes to defend and justify existing systems. In effect, system justifying beliefs allow acceptance of inequalities in the status quo, leading people to see those inequalities as supported and deemed appropriate by others (i.e., legitimized).

These psychological approaches have provided the foundation for recent volumes that have examined the relationship between legitimacy

and justice (Bobocel, Kay, Zanna, & Olson, 2010; Jost & Major, 2001). Despite the varied disciplinary roots, two fundamental questions characterize the legitimacy/justice relationship: How do justice processes explain the emergence of legitimacy? How does legitimacy affect perceptions of and responses to injustice? Below we address theoretical arguments and empirical work relevant to each of these questions.

23.2   Justice Processes and the Emergence of Legitimacy

Philosophers Rawls (1993) and Buchanan (2003) anchor legitimacy in elements of fairness and justice. While individual-level (e.g., referential beliefs, interaction dynamics) and institutional-level social processes facilitate the legitimation of rules, norms, actors, structural arrangements, or the like (see Johnson et al., 2006), we focus on the role of various justice processes. We first delineate Tyler's (Tyler 2001, 1990/2006a, 2006b, 2010) argument about how procedural justice leads to the legitimacy of authorities. Importantly, Tyler's conceptualization of procedural justice involves two elements: decision-making and interpersonal relations. The latter involves the fairness of treatment, which is akin to interactional justice with its emphasis on respect (Bies, 2001; see Jost & Kay, 2010 on the overlap). Then we consider other accounts that bring in distributive justice concerns. We conclude with empirical evidence for these approaches.

23.2.1   The Role of Procedural (and Interactional) Justice

Tyler's (1990/2006a) empirical examination of "why people obey the law" offers the first formulation of how fair procedures used by authorities nurture the emergence of legitimacy. As noted above, legitimacy carries with it a voluntary deference behavior, often in the form of complying with rules, requests, decisions, and the like. Tyler

thus anchors his argument in terms of the more general process of ensuring rule adherence or compliance in social groups. Below we trace the foundation of and subsequent development of this argument.

At the core of Tyler's perspective on justice and legitimacy is a contrast to other means by which authorities secure rule adherence (for other views on such processes, see Fetchenhauer & Wittek, 2006; Kahan, 2005). Tyler (2001, 2006b, 2010) assumes that authorities want to maintain social order and to do so requires securing the cooperation of group members. Authorities might do so by establishing directives and providing incentives and/or sanctions to ensure that individuals follow the directives. Though potentially characterized as a "rational approach," the provision of incentives and the application of sanctions require both the availability and use of resources as well as systems of monitoring or surveillance to elicit the desired behavior. Regardless of whether described in terms of a "command and control process" (Tyler, 2001), social control (Tyler, 2002), reliance on coercive power (Tyler, 2005), or a deterrence approach (Tyler, 2010), such instrumentality is costly (in terms of material and social resources) and often inefficient. Instead, Tyler (2001) proposes an identity approach and then subsequently extends that perspective in his value-based approach to regulation (Tyler, 2010).

Tyler's (2001) identity approach to legitimacy develops out of the group value (Lind & Tyler, 1988) and relational (Tyler & Lind, 1992) models of procedural justice, which rely heavily on social identity theory (e.g., Tajfel & Turner, 1979, 1986; see also Hogg, 2006). Assuming that people want to secure a positive social identity, they draw on information delivered during social interaction to develop both a sense of themselves and their relationships to others, including group authorities. Essentially, individuals want to feel valuable to their group and believe that they belong to valuable groups. Authorities can deliver such status-relevant information through how they make decisions and treat group members. Decision-making fairness involves conformity to rules pertaining to accuracy, honesty, representativeness,

neutrality, correctability, and ethicality (see Leventhal, Karuza, & Fry, 1980). Additionally, decision-makers should demonstrate respect through politeness and dignified treatment and provide evidence of their trustworthiness (Tyler & Lind, 1992; see also Blader & Tyler, 2003). The latter behaviors of decision-makers capture elements of interactional justice (Bies, 2001) as well. Belief that one belongs to a valuable, high status group combined with the status conveyed to him or her by fairness in interaction with authorities produces positive self feelings and enhances identification and commitment to the group, which in turn increase the likelihood that group members accept the decisions of authorities and follow their rules.

Thus, the overarching premise of this identity approach is that procedurally fair authorities are more likely to be perceived as legitimate. For example, when a manager involves his subordinates in decisions that affect how they function in their jobs and shows them respect, the employees are more likely to see him as legitimate and to comply with his requests. The procedural justice/legitimacy link is likely to be particularly strong when group membership is central to individuals' identities and authorities belong to the same social group as the members. Such ties to a group and respectful treatment within a group communicate that an individual belongs to a moral community that embraces particular values rooted in procedural justice that promote human dignity (Tyler & De Cremer, 2009). In effect, procedural justice shapes values.

Tyler (2010; Tyler & De Cremer, 2009) extends the linkages between procedural justice, values, and legitimacy in their value-based approach to rule adherence. He casts the legitimacy of certain rules as value-laden and couples those legitimacy-based values with individual moral values. He argues that "congruence between [legitimated] rules and an individual's moral values should …motivate adherence, as people strive to follow their inclinations to do what they feel is morally right" (Tyler, 2010, p. 258). Thus judgments about legitimacy and morality fuel individuals' intrinsic motivations and sense of responsibility to ensure that their

behavior conforms to the norms, rules, and policies of the groups to which they belong. Such coupling provides the framework for what Tyler terms a "self-regulatory model of authority" (Tyler & De Cremer, 2009). People are more likely to obey rules when they perceive them to be congruent with what they recognize as legitimate and fitting with their sense of right and wrong. For example, when managers talk openly with their subordinates about the values guiding their decisions about job assignments and expected performances, and the two groups forge a shared understanding of those values, then subordinates are more likely to comply with requests consistent with those values. Although Tyler casts such an approach as more efficient and less costly than instrumental strategies dependent upon resource expenditures and emphasizing material outcomes, he notes that its activation within any group or organization will take time to develop.

Nonetheless, to the extent that authorities use fair procedures, incorporating both fairness in decision-making and treatment of group members, they plant the seeds of legitimacy for their rules and policies. Yet, emphasis on procedural justice in the context of hierarchical, authority-based relationships is only one approach to how justice facilitates the emergence of legitimacy. Drawing on sociological traditions, other approaches emphasize the role of distributive justice.

23.2.2 The Role of Distributive Justice

Tyler's procedural justice and value-oriented approach to legitimacy and rule adherence emphasizes relational issues over instrumental, outcome-oriented ones. His conceptualization of instrumental strategies, however, constricts the nature of structural or resource-based relations at the core of most organizations to interactions only between authorities and subordinates, ignoring the dynamics among subordinates themselves. Hegtvedt and Johnson (2009) offer a complementary resource-based model of the

emergence of collective sources of legitimacy, such as authorization and endorsement (Dornbusch & Scott, 1975; see Zelditch, 2006), in multi-tiered organizations based on a social exchange approach to power (e.g., Blau, 1964; see Molm, 2006) and distributive justice processes (see Hegtvedt, 2006; Jost & Kay, 2010). By doing so, they move beyond emphasis on individual beliefs and motivations to the impact of interaction dynamics, including those involving third-party observers who may not be directly affected by the behavior of an authority but whose beliefs may influence those directly affected. Inclusion of observers underscores the *collective* nature of both justice and legitimacy.

As foreshadowed by the ideas of political philosophers noted previously, within any organization, the power structure often constitutes the context in which legitimacy beliefs arise. Those in power hold resources that make it possible to direct, coordinate, and instruct the activities of organizational members so that all benefit in the long run (e.g., products are sold; employees earn a livelihood). Even though coercive power use creates a less stable (and possibly opposed) foundation for authority than legitimacy beliefs, structural power arrangements per se do not require that power be used coercively. Hegtvedt and Johnson (2009) argue that power held by authorities affords them opportunities to contribute to their subordinates' welfare by distributing resources that assist them in being successful in their jobs. Authorities already authorized (legitimated by support from above) may have more opportunities to use their power to provide valued resources to their subordinates (Kanter, 1977) than those lacking authorization.

Nonetheless, to the extent that authorities act benevolently through repeated, successful exchanges, of both material, tangible resources (such worked hours and pay) as well as symbolic, intangible ones (such as praise, office location, awards) (Wayne, Shore, & Liden, 1997), they engender perceptions of distributive and procedural justice, trust (e.g., Molm, Takahashi, & Peterson, 2003), and commitment (Lawler & Yoon, 1998). Moreover, assessments that outcomes and treatment are fair for self and observed

to be so for others reinforces the collective welfare of members of the organizational group (e.g., Settoon, Bennett, & Liden, 1996) and may stimulate shared approval and support of the authority (i.e., legitimizing an authority through endorsement by peers and subordinates). When higher-level authorities note the endorsement of their mid-level managers and the compliance by subordinates that such legitimacy motivates, they may, in turn, augment their authorization of the mid-level authorities. For example, a department chair who provides her faculty members with adequate travel and research funds, appropriate office space, and public recognition for accomplishments is using the resources associated with her department in a way that is likely to win the favor of her colleagues; a dean's observation of this resource use and resulting endorsement of a chair may reinforce her appointment decision.

In contrast to Tyler's (2001, 2010) approach, which assumes that authorities and subordinates are members of the same group and thus promote a shared group identity, the structural power, resource-based approach of Hegtvedt and Johnson (2009) recognizes that authorities and subordinates may perceive themselves as belonging to different groups. Yet, with its emphasis on the dynamics of exchange, the resource-based framework suggests two potential processes that may mitigate the ill consequences of perceiving membership in different groups. First, dynamics among subordinates may allow for the emergence of a sense of shared perceptions among subordinates, which may nurture a shared identity not in opposition to the authority. And second, to the extent that authorities use their power benevolently, they signal respect toward subordinates and cultivate perceptions of procedural justice, as described by Tyler, which may engender a group feeling that includes both subordinates and authorities.

Hegtvedt and Clay-Warner (2004) elaborate on the interpersonal and cognitive processes by which subordinates come to view authorities' behaviors as procedurally just and compare their perceptions to those of others to provide a basis for the emergence of endorsement. With endorsement, subordinates may begin to cement their

relationship and possibly their group identity with the authority. Wenzel (2006) demonstrates that identification with an "inclusive category" (consisting of one's ingroup, outgroup, and authority) enhances the legitimacy of the authority when it treats ingroup and outgroup members similarly. Thus, benevolent power use may enhance the development of relationships across group boundaries, bolster commitment to the organization, and ultimately lay a foundation of an inclusive group identity.

The resource-based approach seems to characterize the antecedents to legitimacy during the initial stages of exchange relationships within a work group when the potential for endorsement is emerging. Then, once established, Tyler's identity/value approach describes the maintenance of legitimacy within groups. Both frameworks assume that authorities and subordinates have similar goals. Yet when the two groups have different goals, subordinates may identify among themselves, rather than with authorities. The coupling of such separation with the failure of authorities to use power benevolently may result in conflict, as illustrated in the example that opened this chapter. Below we further examine how collectively perceived injustice may undermine the perceived legitimacy of the authority and challenge the status quo.

Even though certain conditions may undermine the legitimacy of an authority whose initial support and approval was established via justice processes, neither model explicitly deals with such processes. In many other ways, however, the procedural and distributive justice models of the antecedents to legitimacy are complementary. Importantly, they identify issues of structure, interactional dynamics, and identity relevant to the emergence of legitimacy.

23.2.3 Empirical Evidence of the Effects of Justice on Legitimacy

Substantial evidence, reviewed below, confirms the relationship between procedural justice, including its interpersonal elements, and legiti-

macy, in support of Tyler's identity and value-oriented approaches. In contrast, fewer empirical investigations have examined the impact of distributive justice on legitimacy. Empirical work fits within two interactional domains: encounters with legal authorities and organizations.

Encounters with Legal Authorities

Support from the public is one necessary component to enable the criminal justice system to function properly. Fagan (2008) identifies procedural fairness and respectful treatment as one of the major concerns for the legitimacy of the criminal justice system (other concerns involve perceived justice in sentencing and the system's ability to accurately detect wrongdoing and thus protect the public). Tyler's research (1990/2006a) launched consideration of how the fairness of interactions with the police and courts affects perceptions of legitimacy. Subsequent studies examine particular types of encounters with legal authorities and of communities.

Tyler (1990/2006a) examines the self-reported attitudes and behaviors toward agents of the law of a random sample of 1575 Chicago residents, including a smaller subsample that had direct experience with police or courts. The study focuses on the impact of relational (procedural justice) and instrumental (distributive justice considerations regarding outcomes) elements on perceptions of legitimacy and the relationship between legitimacy and compliance. While the latter relationship is fully confirmed, the former relationships are more nuanced. Results indicate that citizens who thought that authorities used fair procedures (e.g., representation, impartiality, consistency) in making decisions and treated them with respect and dignity were more likely to be judged as legitimate, regardless of the actual outcome of the encounter. And, although distributive justice assessments influenced compliance, they did not affect legitimacy.

Similarly, results from two surveys of respondents from random samples drawn for registered voters in New York City ($N = 586$ sampled prior to and $N = 1422$ sampled after September 11, 2001), perceived procedural justice emerged as the best predictor of police legitimacy, exceeding

the impact of performance evaluations and distributive justice (Sunshine & Tyler, 2003). The perceived fairness of police treatment had a stronger relationship with legitimacy than perceived police ability to offer effective help and quality of police services relative to people of a different race or socioeconomic status. Plus, perceived legitimacy increased compliance with police requests.

When police officers have support from the people in their communities, they are more successful in keeping order and reducing crime. In Australia, postal survey findings involving 2.611 residents show that those who believe police procedures and practices are fair are more likely to view them as legitimate and be satisfied with their services (Hinds & Murphy, 2007). As illustrated in a randomized field trial study in the United States, even minor, though procedurally just, traffic encounters enhance individuals' beliefs about the legitimacy of the police (Mazerolle, Antrobus, Bennett, & Tyler, 2013). Empirical evidence also shows the linkage between fair encounters with police and perceptions of their legitimacy among Jamaican high school students ($N=289$), which in turn enhances their willingness to help the police fight crime (Reisig & Lloyd, 2009). Importantly, as shown by a study integrating census data and survey responses in a mid-size city ($N=531$ from representative state sample across different types of neighborhoods) this robust relationship between procedural justice and perceived legitimacy of the police remains even when analyses take into account the impact of concentrated disadvantage in neighborhoods (Gau, Corsaro, Stewart, & Brunson, 2012).

Two practices often employed by the police, however, threaten their legitimacy, in large part because people view the procedures employed as unfair. First, "order maintenance policing" seeks to control crime by sending a message that even the slightest infractions will not be tolerated, and often involves practices such as frequently stopping people suspected of petty or low-level disorderly behavior. Based on interview data from young men ($N=45$), such practices appear to negatively affect police legitimacy and crime

control efforts because these stops often target relatively minor or ambiguous offenses (e.g., "stop and frisk") (Gau & Brunson, 2010). Second, "profiling" considers a person's race when determining how to proceed with regard to actions like stopping cars for traffic violations, patrolling neighborhoods, or arresting alleged offenders. This practice, when used as a measure for procedural injustice, negatively affects perceptions of police legitimacy (study 4 [$N=1.653$] Tyler & Wakslak, 2004). Thus, despite the aim of these practices to increase public safety, they negatively impact perceived procedural justice and thus police legitimacy as well.

Other research focuses on evaluations of court authorities and perceived legitimacy. Although Gibson (1989) suggests that people may comply with unpopular Supreme Court decisions because of levels of diffuse support for the Court rather than procedural justice concerns, Tyler and Rasinski (1991) reanalyze Gibson's data ($N=606$ from General Social Survey) and reveal an indirect effect of procedural justice, through legitimacy, on compliance. While Gibson (1991) questions their reanalysis because individual citizens know little about Supreme Court procedures and assessment of procedural justice in this instance may be insufficiently distinct from measures of perceived legitimacy, other studies provide support for the link. For example, Tyler (1997, study 6, $N=502$ California bay area residents) shows that relational elements (neutrality, trustworthiness, status recognition) have stronger impact on perceived legitimacy of the Supreme Court than instrumental concerns (e.g., outcome favorability, process control), although the latter were not irrelevant to legitimacy judgments.

Also other investigations in which litigants are familiar with the legal decision process uphold the relationship between perceived procedural justice in court proceedings and legitimacy of the criminal justice system. Qualitative research ($N=120$) shows that adolescents perceive the criminal justice system as less legitimate, regardless of their personal outcomes, if they experience delays, confusion, or unprofessional conduct

in the courtroom (Greene, Sprott, Madon, & Jung, 2010).

Encounters with Authorities in Other Contexts

Evidence from contexts outside of the legal arena also provides support for the predicted relationship between procedural justice and the perceived legitimacy of authorities. Results from studies 1–5 (each involving different samples: college students in Studies 1 [$N=335$] and 2 [$N=346$]; residents of Chicago serving in managerial roles in Study 3 [$N=409$]; public-sector employees in Northern California in Study 4 [$N=305$]; and San Francisco citizens in Study 5 [$N=401$]) reported in Tyler (1997) show that relational factors representing procedural justice enhance the perceived legitimacy of authorities in the family, in academic departments, in private- and public-sector work organizations, and local government. And again, instrumental concerns about outcomes affect legitimacy but have lower impact than procedural justice.

In another study, Tyler and Blader (2000) interviewed 404 employees, working in various contexts, about their supervisors or leaders in their organizations use of fair procedures and their perceptions of the legitimacy of those leaders. Evidence for the expected positive relationship emerges. Additionally, other work on employees (Tyler & Blader, 2005) confirms a strong link between both perceived legitimacy and value congruence and rule adherence among employees.

A recent study (Van der Toorn, Tyler, & Jost, 2011) provides some indirect evidence of the Hegtvedt and Johnson (2009) argument regarding the role of power and distributive justice in the emergence of legitimacy. Anchoring their research in the systems justification approach (Rothmund, Becker, & Jost, 2015), they argue that outcome dependence (i.e., the extent to which a subordinate is dependent upon an authority for desired outcomes and thus power-disadvantaged) enhances the likelihood of judging the authority as legitimate. Results from the analysis of three surveys (involving conflict resolution for undergraduates [$N=380$], a natu-

rally occurring social dilemma focused on water shortages [$N=401$], and New York residents' perceptions of the police [$N=830$]) consistently demonstrate positive effects between outcome dependence and perceived legitimacy of authorities. (Positive effects for perceived procedural justice emerge as well.) Two follow-up experimental studies reiterate the predicted positive relationship, one focusing on perceptions of legitimacy and the other on compliance with the authority. Additional analyses reveal that perceived legitimacy mediates the effects of outcome dependence and procedural fairness on assessments of outcome favorability. The authors conclude "that because outcome dependence breeds legitimacy the powerless also contribute to the maintenance of an unequal status quo that may not be in their own interest" (Van der Toorn et al., 2011, p. 136).

Summary

Clearly, results from studies focused on nonlegal contexts are consistent with those from legal contexts in demonstrating the expected procedural justice effect on legitimacy of authority. Yet, the findings also hint at the role outcome assessments may play. Tyler and colleagues often employ measures of outcome favorability and perceived process control to instantiate what they call "instrumental judgments" (in contrast to "relational judgments" pertaining to procedural justice); whether such instantiations actually represent perceptions of distributive justice, however, should be closely examined. Findings from Van der Toorn et al. (2011) are consistent with the Hegtvedt and Johnson (2009) argument, but their studies focus on the distribution of one outcome or evaluation. Similarly, exchange approaches and their analyses of trust and commitment hint at the importance of the use of benevolent power to bolster the legitimacy of an authority. To fully assess the impact of distributive justice requires consideration of how authorities allocate multiple resources across multiple actors over time. And, as noted in Tyler, Dienhart, and Thomas (2008), the fairness with which authorities allocate punishments when workers break organizational rules may also be relevant in

shaping the perceived legitimacy of management. Thus, the extent to which distributive justice processes complement procedural justice in shaping legitimacy of authorities (or policies or outcomes) requires further investigation. In contrast, however, scholarly work on the impact of legitimacy on justice evaluations has largely focused on distributive justice.

23.3 The Effects of Legitimacy Processes on (In) Justice Perceptions and Responses

The group value model underlying Tyler's (1990/2006a) initial approach to the role of procedural justice in the creation of the legitimacy of authority highlights how individuals are embedded in a social context. Likewise, the Weberian sociological perspective on legitimacy, first proposed by Dornbusch and Scott (1975) and elaborated by Zelditch and Walker (1984; Walker & Zelditch, 1993; Zelditch, 2001a, 2006), emphasizes the role of collective aspects of social dynamics. The impact of legitimacy on justice perceptions and responses, then, focuses on how other people's evaluations and responses in an unjust situation affect an individual's own assessments and reactions. Below we first appraise the elaborations offered by Zelditch and his colleagues and then discuss later attempts to more closely integrate their legitimacy arguments with issues of (distributive) justice. We again call attention to the behavior of third parties in justice situations to illustrate their potential role in legitimizing individuals' perceptions and responses to injustice. We conclude this section with a review of empirical studies examining the impact of legitimacy on justice processes.

23.3.1 The Role of Collective Sources of Legitimacy

In their theoretical research program, Zelditch and Walker (1984; Walker & Zelditch, 1993) seek to determine how legitimacy "increases the acceptance of, or reduces the resistance to, some-

thing else" (Zelditch, 2001a, p. 5). As such, they recognize that legitimacy may be auxiliary to other processes, including those focused on the fairness of distributions, procedures, and treatment. The foundation of their approach is Dornbush and Scott's (1975) distinction between propriety and validity. As defined above, propriety refers to an individual's personal beliefs that an "object" (an authority, rules, norms, structural arrangements) is desirable and appropriate whereas validity captures the idea that the individual believes that he/she is obliged to comply with the authority, the rules, etc. even in the absence of personal approval of them. Zelditch and Walker emphasize how views of others in the social context enhance the validity of the "object." Their perspective and later elaborations focus on collective sources of legitimacy: authorization (support from "above") and endorsement (support from those of equal or lower status). They analyze authorization and endorsement as processes that produce compliance, behaviorally demonstrating legitimacy of an authority, rules, norms, or a social order.

Why should people comply with an authorized or endorsed norm or authority? Distinct from Tyler's (2010) value approach, Zelditch and Walker anchor their response to this question in sanctions. They argue that authorities or "uppers" in a group hierarchy control formal sanctions, such as docking pay, limiting desired work assignment opportunities, or preventing promotions for insubordination. At the same time, peers or other subordinates in the group have at their command informal sanctions, including scorn, ostracism, and the like. For example, if Professor Green voiced concerns that she believed her department chair to be unjustly favoring certain segments of the department in hiring and research funds, she may have been met by disdain by her colleagues who still supported the chair and by a reduction of her own travel funds by the chair. Within a group situation, individuals compare their own evaluations of an "object" with what they believe others around them think. If they perceive support by others of, for example, an authority or norm, then they assume that others will act in accord with the authority or norm,

which, in turn, affects their own reactions. In effect, people who are affected consciously or unconsciously consider the implications of failing to also provide public support for the "object." The potential sanctions, in other words, carry social and perhaps material costs, which individuals may attempt to avoid by complying with an authority's decision or acquiescing to a given behavioral expectation. Should Professor Green have sensed that the chair remained legitimated in the eyes of her colleagues, she may not have voiced her concerns.

Although no explicit mention of the import of legitimacy to justice processes emerges in the early work by Zelditch and Walker, their program of studies (described more explicitly below) relies upon an unjust situation. And, Zelditch (2001b) hints at how perceived injustice, which may lead to dissent more generally, might destabilize the legitimacy of a given distribution or social order. Thus, it is not surprising that other scholars have attempted to make the legitimacy/justice link more apparent.

Cohen (1986) first attempted such a theoretical linkage by focusing on the legitimacy of a structure of power. He argues that authorization of a power structure increases individuals' acceptance of the structure, even if it produces an unjust distribution of outcomes. Additionally, he suggests that if observers also believe that their peers support the structure, any collective action to alter the existing social order as a response to the injustice it creates grows unlikely. Thus, authorization and endorsement operate against opposing forces for change.

Following up on Cohen's initial theorizing, Hegtvedt and Johnson (2000) delineate how collective sources of legitimacy specifically impact perceptions of and responses to injustice. They draw on distributive and procedural justice perspectives and the few early justice studies that examine how "what others think" affects individuals' justice actions. For example, Kahn, Nelson, Gaeddert, and Hearn (1982) provide evidence that in face-to-face discussions, people compare their perceptions of what distribution rule is fair with the opinions of others and end up promoting the distribution principle suggested by a member whose interests were not directly served by the principle. And when multiple group members perceive that they are unjustly treated by a leader, they tend to coalesce to reallocate rewards more justly (Webster & Smith, 1978). These experimental studies not only highlight the collective element missing from much justice research but also emphasize the development of consensus about what constitutes fairness that collectively benefits group members. In taking into account the social context of justice processes, they draw attention to the underlying role of social comparisons and cognitions in linking legitimacy to justice.

Hegtvedt and colleagues (Hegtvedt, Clay-Warner, & Johnson, 2003; Hegtvedt & Johnson, 2000) argue that when an individual compares his or her personal assessment of an outcome distribution or procedure to the evaluations expressed by others (authorities or peers) about the focus of the justice evaluation or the decision-maker, to the extent that there is disagreement, he or she grows less certain and less confident in the original assessment. The undermining of the certainty of a person's justice evaluation may attenuate the severity of the perceived injustice. In addition, the perception of injustice should stimulate the attribution process to determine "why" it occurred, with a focus on the allocator (see Utne & Kidd, 1980; Van den Bos, Bruins, Wilke, & Dronkert, 1999). Endorsement and authorization of the allocator essentially provide consensus information pertinent to the attribution process (see Fiske & Taylor, 2013). If peers or authorities legitimize the allocator, even if the distribution—representing a single act—seems unjust to the perceiver, he or she may be less likely to attribute the injustice internally to the allocator's intentions and more likely to assume external causes such as the authority's position and associated rights or a one-time judgment lapse. External attributions, in turn, are likely to decrease the perceived severity of the injustice. For example, if an authorized and endorsed manager decides unilaterally to invest in a fancy, expensive coffee machine for the office rather than distributing quarterly bonuses, employees may attribute it to some new managing gimmick to enhance the quality of the workplace rather than to an intentional decision to deprive them of

extra cash; in making that external attribution, they are less likely to protest what they might have seen as an unfair use of the money. Hegtvedt et al. (2003) consider how the legitimacy of the allocator, in conjunction with his or her use of fair procedures, also works to attenuate the perceived severity of distributive injustice.

With regard to responses to injustice, Hegtvedt and Johnson (2000) contend that endorsement and authorization may operate directly or indirectly, through altered assessments of injustice. To the extent that legitimacy invokes the possibility of sanctions—both material and social—for noncompliance, it affects the cost and nature of responses. When others disagree with a focal perceiver's assessment and legitimize the unfair distribution, procedure, or allocator, that person may be less likely to take action on his or her own and others are less likely to join in collective action to oppose the injustice. In effect, legitimacy processes hamper overt responses, although unobservable responses involving cognitive distortion of elements of the situation may occur. In contrast, if others perceive the injustice and fail to legitimize the existing distribution or allocator, then the seeds for forming coalitions and fomenting for social change are sown.

Such analysis raises two issues. First, legitimacy, especially endorsement processes, draws attention to the role of others who may not be directly affected by a particular distribution, procedure, or treatment. Yet the extent to which they support an act or a decision, or the person making the decision, may affect how an individual responds. As Skarlicki and Kulik (2005) note in their review of the growing research on the role of third parties in justice situations, observers are important group members because not only do they learn what fate they too may experience by observing that of others but they also may be active in bringing about changes. They may act as agents for the injustice sufferer vis-à-vis an authority and they may join in collective action—especially if they fail to endorse an authority or a decision and likewise perceive injustice.

The responses of others highlight the second issue: legitimacy is a double-edged sword. It generally ensures social order, but sometimes at the cost of acquiescence to an unjust distribution, procedure, or treatment. In such instances, what is legitimated may not be just. For example, in many schools there is a zero tolerance policy with regard to weapons; when schools invoke a 3-day suspension for a 7-year-old for pointing his finger like a gun at a classmate, the legitimate rule has been upheld but many may see the punishment as severe and unfair. Walker (2014) argues that tensions between legitimacy and perceived injustice threaten social stability. He contrasts individual-level responses, which may improve the lot of one disadvantaged group member, to joining with peers to take collective action as a means to potentially improve conditions for all. Although individual and collective interests may not always coincide, ultimately it is the threat of collective dissent and actual collective action (coupled with factors beyond individuals' perceptions) that weakens the status quo and potentially destabilizes systems of inequality in outcomes, procedures, or treatment. Stymieing the conflict and establishing a new sense of what is legitimate may depend on the distribution of actual benefits to signal concern with collective welfare (Cohen, 1986) or a shift in power.

To date, however, most empirical research on the influence of legitimacy on justice processes shows what Cohen (1986) labels the "acquiescence" rather than the "opposition" effect. The studies noted below are outside of traditions such as belief in the just world (Hafer & Sutton, 2016, Chap. 8 of this handbook) or legitimizing ideologies (Rothmund, Becker, & Jost, 2016, Chap. 15 of this handbook), which also demonstrate why disadvantaged actors often fail to respond to injustice, thereby acquiescing to the status quo.

23.3.2 Empirical Evidence of the Effects of Legitimacy on Justice

The work of Zelditch and Walker (1984; Walker & Zelditch, 1993) offers a first glimpse of the impact of legitimacy on responses to an unjust distribution. Later work attempts to test relationships hypothesized by Hegtvedt and Johnson (2000).

In their experimental work on legitimacy and compliance, Zelditch and Walker create a communication network where the actor in the "center" position is structurally advantaged and thus obtains the highest outcomes from interaction with others. In effect, the communication network represents a given social order, albeit one that results in an unfair distribution. Interest focuses on whether disadvantaged group members would challenge the structure or simply comply. Findings show that when the network is either validated (Thomas, Walker, & Zelditch, 1986) or specifically endorsed by other group members (Walker, Thomas, & Zelditch, 1986), demands to change it are infrequent. Such effects emerge even when private opinions (i.e., propriety) of group members indicate that they do not accept the unjust structure. Another study further demonstrates that validity affects such individual beliefs, decreasing the intensity of the belief that the network was unfair (Walker, Rogers, & Zelditch, 1988).

Vignette studies likewise confirm the effects of legitimacy on people's sense of propriety or actual justice evaluations. Johnson and Ford (1996) show that endorsement and authorization of a manager reduce the likelihood that study participants imagining themselves in a pay conflict (owing to perceived injustice about their pay) with a work manager would pursue tactics like forming a coalition or seeking the advice of higher authorities to redress the conflict. A third-party vignette study regarding the combined effects of procedural justice and endorsement demonstrates that respondents viewed the situation (the distribution of sought-after committee positions) as most fair when the decision-maker used fair procedures and was highly endorsed (Hegtvedt et al., 2009). Also, the fair process effect (whereby procedural justice positively affects distributive justice evaluations) is strongest under conditions of high endorsement.

Mueller and Landsman (2004) use data from a survey of child welfare social workers ($N = 745$) to examine the effects of endorsement and authorization proposed by Hegtvedt and Johnson (2000) as well as procedural justice. Their findings demonstrate that collective sources of legitimacy attenuate, as anticipated, the perceived injustice of the rewards that individuals receive from their company. And, legitimacy is more important than self-interest in influencing perceptions of justice. Workers' perceptions of the fairness by which decision-makers allocate the outcomes, however, mediate the legitimacy effects.

Summary

Together, these studies illustrate the impact of collective sources of legitimacy on assessments of and responses to outcome injustice. The empirical work also signals the importance of considering how legitimacy and procedural justice may combine to shape outcome judgments. What remain missing, though, are considerations of how "what others think" about an authority also shapes his or her behaviors. For instance, are legitimated authorities more likely to use fair procedures in decision-making or in their treatment of subordinates than those without legitimacy? When does legitimacy allow authorities to deviate from procedural justice? Also, examination of the conditions under which perceived injustice stimulates opposition to currently legitimated distributions, authorities, and structures awaits greater empirical scrutiny. Below we consider additional issues that may bear on the legitimacy/justice relationship.

23.4   Conclusion

In fall 1960, a cohort of young women arrived at Spelman College, a historically Black institution in Atlanta, Georgia, to begin their college careers, pursuing the promise of higher education for bettering their lives. Little did their middle-class families anticipate that their daughters would engage in far more than attending classes, choosing a major, and dating Morehouse men. As described in the documentary film, *Foot Soldiers*: *Class of 1964*, these women came to recognize the injustice of discriminatory segregation. Influenced by their upper-class mates, they began to wonder why, in their social context, they consistently and squarely were confronted with discrimination in daily inter-

actions in public places such as stores, restaurants, and other businesses. Such a realization led them to challenge the legitimacy of the system that permitted such discrimination. Despite parental acquiescence to the existing system and instructions to their daughters to focus on their studies and remain distant from the unrest, they participated in the coordinated civil rights protests that were sweeping the American south. While peacefully picketing or sitting in at segregated lunch counters, they suffered the wrath of Klu Klux Klan members, police, and even less racist whites who simply feared challenges to the long-standing Jim Crow laws. Collectively, individuals brought attention to the injustice of a legitimated system and, ultimately, the nonviolent protests coupled with recognition by others, including third parties in positions of power and advantage, of that injustice, spurred the passage of one of the most transformative pieces of legislation in twentieth century United States: the Civil Rights Act of 1964.

In effect, the civil rights movement epitomizes Rawls's (1993) recognition that legitimated state institutions may not always be just. This historical example illustrates the dynamic relationship between legitimacy and justice beyond the confines of a particular organization as well as its double-edged nature. Parents of the young women essentially complied with the validity of a (unfair) system—regardless of personal beliefs—and urged their daughters to suppress responses to the injustice. Nonetheless, the college freshmen perceived injustice (whether conceptualized as procedural, distributive, or interactional) and attempted to undermine the legitimacy of system. Their actions seem to have emerged from development of a group identity tied to the vision of their older classmates, interactional dynamics that spurred endorsement of a new system, and the collective action—and ultimately a margin of consensus—necessary to achieve it. In turn, the desired new system aligned with moral beliefs of equality and freedom, consistent with Tyler's (2010) value approach to social regulation.

While analysis of this particular example, one among many describing historic social change,

reflects the dynamics of legitimacy and justice processes described in the foregoing review, it also hints at issues that have yet to be examined theoretically or empirically. To conclude this chapter, we identify several issues that we believe will augment our understanding of the linkage between legitimacy and justice.

First, this chapter has demonstrated that the primacy of legitimacy or justice in the relationship between the two processes, a "chicken and egg" conundrum of sorts, fades when the nature of the social context enters the analysis. The legitimacy of a new rule, a new authority, a new social order emerges over time. Justice processes play a role in its emergence, as the philosophers argued. Whether procedural, interactional, or distributive justice is paramount, however, depends on the existing familiarity between members of different groups, subordinates, and their managers, "the people" and governmental representatives, and the like. Hegtvedt and Johnson (2009) argue that the fair distribution of resources may matter in early interactions among authorities and their subordinates to establish legitimacy whereas continued procedurally, just decision-making and treatment of subordinates may sustain that legitimacy. Empirical work should consider the stage of a relationship when examining the impact of forms of justice on legitimacy. In addition, those relationships are often embedded in structural power arrangements. Although many studies focusing on perceptions of authorities (in organizations generally or specifically in legal arenas) implicitly considered the impact of power differences, few studies explicitly examine the impact of variation in structural power arrangements and in the nature of power use, despite theoretical arguments emphasizing their importance (e.g., Cohen, 1986; Hegtvedt & Johnson, 2009).

In many instances, legitimacy already exists, providing stability and decreasing the cost of compliance. Yet, as studies reviewed above indicate, legitimacy attenuates perceptions of and responses to injustice. Nonetheless historical examples illustrate the possibility of undermining previously legitimated social orders. More systematic work is needed to address the condi-

tions under which perceived legitimacy fails to quell concerns about injustice (see Walker, 2014). In effect, this is a question of the process of delegitimation (Johnson & Watson, 2015). To do so also requires consideration of underlying processes activated by social conditions.

Thus, a second issue focuses on social psychological processes of cognition, identity, social comparisons, and emotions. The theoretical approaches described in this chapter clearly identify roles for cognition or attribution (see also work in system justification theory on stereotyping (Rothmund, Becker, & Jost, 2016, Chap. 15 of this handbook) and group identity. Although beyond the scope of this chapter and not specifically anchored to justice concerns, much work on intergroup processes involves examination of cognitive and group identity mechanisms that foster or breakdown discriminatory practices, which, respectively, maintains or undermines the legitimacy of a social ordering of groups (see Hogg, 2006). And, implicit in both procedural and distributive justice approaches pertaining to legitimacy are concerns about social comparisons. When and with whom do individuals compare their justice assessments with those of others, which in turn shape their justice assessments? Are comparisons to members of the group with which they identify or are they to others who they believe have more power in the situation? In the example of the Spelman women who joined the civil rights movement, clearly they compared their evaluations of injustice to those of their upper-class peers rather than to their parents. Explicating underlying cognitive, group identity, and social comparison processes seems essential to a more nuanced understanding of the effects of legitimacy on responding to injustice.

Unlike the other underlying processes, scholars have given little attention to the role of emotions in current theorizing and empirical work at the intersection of legitimacy and justice. Yet justice researchers have long argued that people emotionally respond to injustice, which in turn may propel further behaviors (see Hegtvedt, 2006). One vignette study (Johnson, Ford, & Kaufman, 2000) addressing emotions shows that individuals are less likely to feel resentment and

to express anger or resentment when a dispute over pay is with a manager endorsed by their peers, (i.e., legitimacy depresses negative emotional responses to injustice). Emotions, however, may play other roles in the dynamic between legitimacy and emotions. Emotional bonds with fellow group members may shape comparison choices, the development of a group identity, and ultimately the perceptions of the fairness of a system. Indeed, some evidence demonstrates that affect influences assessments of justice (Van den Bos, 2003) and is not simply a response to injustice. Emotions may also override assessments of the "costs" of challenging a legitimate system that produces unfair outcomes or uses unfair procedures. The *Foot Soldiers* example hints at these possibilities—incoming cohort members developed emotional bonds to their more senior counterparts, which may have reinforced personal negative feelings toward discrimination. Emotional elements of legitimacy and justice, moreover, may also figure in understanding motivations underlying both compliance with and challenges to legitimate authorities.

Although Tyler (2010) highlights motivational elements pertaining to justice and legitimacy processes, his argument raises a third issue regarding the nature of legitimacy. In effect, he suggests that congruency between an individual's own moral values and the values represented by the dictates of legitimate authorities, help to shape intrinsic motivations, which underlie a new value-based model of social regulation. As such, legitimacy seems to become an attribute of an individual, not of an "object" external to the individual. While such congruency helps to achieve rule adherence or compliance with authorities, it also seems akin to saying that Weberian notions of propriety drive systems of legitimacy. Yet, as reviewed above, much of the research by Zelditch and colleagues (see Zelditch, 2001a) suggests otherwise—individuals failed to challenge a legitimized system despite their personal beliefs about its unfairness. Personal moral beliefs, moreover, especially when they are supported by others, as in the example of the Spelman women, may be a means for undermining an illegitimate system. This contrast between the possibility that

legitimacy rests in an individual versus resting in a rule, authority, or social system represents a conceptual issue to drive future theorizing and empirical work.

As evidenced in the work described in this chapter, justice and legitimacy processes are often intertwined in social contexts, making it sometimes difficult to disentangle their connection to one another. Yet, previous research certainly provides some understanding of this complex relationship and the behavioral consequences that arise in justice situations. Work bringing together some of the underlying processes, such as cognitive, emotional, social identity, and social comparison processes, may provide a greater understanding of this complex relationship and resulting behavior. For example, Spears (2008) begins some of this work in his analysis of how the roles of legitimacy, group identity, perceptions of group injustice, and emotions may help to constrain discrimination. Building such bridges will advance theoretical understanding of the conditions under which actors will resist and challenge the taken-for-granted inequalities between groups and advocate for new just systems of governing/organizing, as well as the conditions under which legitimated yet unjust systems remain in spite of felt injustice.

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Archives and Social Justice Research

24

Susan Opotow and Kimberly Belmonte

Archives are familiar institutions. They vary widely in size, content, medium, and purpose. Some are small family or institutional collections stored in homes, offices, or libraries. Others are large and preserve a city's history, such as the 72 miles of records in the London Metropolitan Archives, or a nation's history such as the 150 million documents in the Ottoman Archives in Istanbul. This paper argues that archives are rich sites for empirically-based social justice research.

Archive is a noun when it refers to a place-based repository for historical records or artifacts. The verb, *to archive*, positions archiving as an active process: "to place or store in an archive referring to the activities involved with acquiring, collecting, and making archival material available to the public and to scholars" (Oxford English Dictionary, 2014). The Society for American Archivists describe of the professional activities that create and maintain archives:

> Archivists select, preserve, and make available primary sources that document the activities of institutions, communities and individuals… Archivists provide important benefits and services such as: identifying and preserving essential parts of the cultural heritage of society; organizing and maintaining the documentary record of institutions,

groups, and individuals; assisting in the process of remembering the past through authentic and reliable primary sources; and serving a broad range of people who seek to locate and use valuable evidence and information (Society of American Archivists, 2012).

24.1 The Abuse of Authority: Archives and Injustice

As influential societal institutions, archives have documented violent and unjust state activities as well as opposition to injustice.

Critical scholars have argued that, in addition to preserving and maintaining historical material, archivists can foster social justice (cf., Cook, 2011; Jimerson, 2007). Harris (2007) maintains that "if archivists do not enter the power contests on behalf of democracy, then they turn their backs on higher callings and condemn themselves to being merely bureaucrats and functionaries" (p. 262).

Archives and power. As "loci of power of the present to control what the future will know of the past" (Schwartz & Cook, 2002, p. 13), archives are authoritative sites that can substantiate or refute historical accounts, reshape collective and historical memories that fade with the passing of generations (cf., Halbwachs,

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1992), and support the contemporary social order (Gorgas, 2003; Jimerson, 2007). In a 1970 speech to the Society of American Archivists, Howard Zinn called for the field to correct biased archiving practices that primarily preserve historical material on people who are wealthy, white, and elite (Zinn, 1977). He asked archivists to actively seek out the stories and material of marginalized people who have been excluded from the historical and archival record (also see Ham, 1975). Doing so allows archives to offer counter-narratives that retell history and challenge an unjust *status quo* (Harris, 2002).

Archives and persecution. Several notoriously repressive regimes in the twentieth century produced vast archives on individuals they persecuted, tortured, and murdered (Quintana, 1998). The Third Reich in Germany (1933–1945), for example, kept detailed records on deportations and deaths (Kahn, 1969). The Stasi, the Security Ministry of the German Democratic Republic (1945–1989), generated voluminous records based on the surveillance of millions of East German citizens (Wolle, 1992). Security forces during apartheid in South Africa (1948–1994) also kept extensive files on citizens (Harris, 2002). The Khmer Rouge in Cambodia (1975–1979) archived confessions of political prisoners obtained through torture and photographs of prisoners before their execution (Caswell, 2010). As these regimes lost power, such archives became legal liabilities. Toward World War II's end, the Third Reich ordered the destruction of its records to shield its leaders from prosecution for war crimes. In South Africa, only documents with prior approval as "official memory" (Harris, 2007, p. 205) survived apartheid's end.

Archives and the advancement of social justice. Despite archives' origins in power hierarchies and their role in oppressive regimes, archives have also played a significant role in redressing injustice. Archives that remained after repressive regimes ended, along with archives produced by activist individuals and groups, have been utilized in war crime prosecutions and have substantiated victims' legal claims for redress. Archived records, for example, allowed Americans and Canadians of Japanese descent to seek reparations for World War II-era internment decades after the war (Laberge, 1987).

Archives have also documented the precarious circumstances of lives lived amidst injustice, offering detailed accounts of profound challenges faced by persecuted groups. The Ringelblum Archive, for example, was a clandestine documentation project in the Warsaw Ghetto during World War II. Led by historian Emmanuel Ringelblum, the project collected and archived narratives of "researchers, writers, teachers, people in public office, members of the underground, and simple, ordinary Jews" (Kermish, 1992, p. vii). Preserving these diverse personal accounts was motivated by a sense of urgency as mounting persecution signaled an uncertain future for the ghetto and its residents. The archive served as a collective effort to speak to people in the future about ghetto residents' experiences.

National archives also document injustice and efforts to combat it. For example, the Museum of Memory and Human Rights in Chile, which opened in 2010, contains archives documenting the brutal human rights violations of the Pinochet dictatorship (1973–1990). These significant archives accumulated as human rights groups in Chile opposed the dictatorship's repressive policies. In the post-dictatorship period, the archives were used in legal proceedings against members of the Pinochet government. In 2003 the archives were incorporated into the UNESCO Memory of the World heritage register because of their historical significance (Estrada, 2008). As authoritative historical resources that documented the Pinochet era, the archives served as the basis for the Museum of Memory and Human Right's permanent exhibition (Opotow, 2015).

24.2   Archives and Models of Justice

Justice is a complex and diffuse construct. To study the relationship between social justice and archives, we focus on three justice contingencies *what*, *how*, and *who*: distributive justice, procedural justice, and exclusionary and inclusionary justice (Clayton & Opotow, 2003; Opotow, 1996, 1997).

Distributive justice emphasizes what resources are fairly allocated to individuals or groups (Deutsch, 1985; Walzer, 1983). Perceptions that resources are distributed unfairly can provoke perceptions of distributive injustice. Foa and Foa (1974) contend that both tangible and intangible distributive resources, such as information, have psychological importance. Applied to archives, distributive justice concerns an archive's informational resources, including materials in its collections and materials that can be accessed.

Procedural justice emphasizes how procedures and processes guide social relations. A procedural model of justice is attentive to the clarity and consistency of rules, the impartiality of decision makers, and the correctability of unfair processes (Lind & Tyler, 1988; Thibaut & Walker, 1975). Applied to archives, procedural justice concerns institutional policies and archivists' activities that operationalize these policies including collecting, cataloging, preserving archival material, and shaping or reshaping a collection.

Exclusionary and inclusionary justice focus broadly on the justice contingency, *who*. It is an emphasis on social categories that are within or outside the *scope of justice*, the boundary within which considerations of fairness apply to others (Opotow, 1990). Those within the scope of justice can be viewed as deserving of rights and resources; those outside can be viewed as nonentities or enemies and therefore can be harmed or exploited (Opotow, 1995, 2012). Applied to archives, exclusionary and inclusionary justice aligns with critical perspectives that are attentive to the purpose for which an archive was created,

what was included in the collection and what was not, who uses or benefits from the archive, and who may access it and who may not. The justice contingency, *who*, aligns with arguments that archives should be inclusive and benefit all members of society with special attention to previously excluded and silenced voices and marginalized cultures (Harris, 2007; Jimerson, 2007; Zinn, 1977). All matters of acquisition of information and access to archives, including the implementation of open or closed access policies, are relevant to exclusionary and inclusionary justice.

To summarize, archives and social justice research intersect in several ways. First, archives offer details about how people in the past have perpetrated injustice, been victims of injustice, and been bystanders to injustice. This can provide information of interest to scholars who are examining the past, comparing the past with the present, or developing theory on justice and change. This information can also support social justice initiatives by providing documents that validate claims about past injustice.

Second, archives provide evidence for changes in norms and behavior over time. They offer details on various forms of injustice in the past including racial discrimination; social inequality/poverty; the abuse of political, economic, military power; and group-based victimization and violence.

Third, archives can foster informational injustice when the material they contain does not represent the totality of what was available and, instead, is biased due to selective acquisition policies or excision of unwanted material. This can serve special interests rather than the larger public.

Fourth, archives are valuable information repositories once people who witnessed past events are gone. They can supply the raw material for scholarly and artistic projects, including books, articles, plays, and exhibitions that can inform the larger public about the causes, progression, and outcomes of past injustice with the goal of preventing similar injustice in the future.

24.3 Archive-Based Social Justice Research: Five Examples

To study the kinds of justice questions that can be examined in archives, we sought out archive-based, empirical, social science studies on justice. Because the search proved challenging, yielding too many hits or too few, we worked with a university reference librarian. Together, we located 14 peer-reviewed articles at the intersection of archives and social justice. In this set of papers, researchers used archives to investigate various social justice issues at the individual, community, institutional, and societal levels. A close read of the method sections in each paper indicated that 5 of the 14 papers had a primary focus on archival research. In the section that follows we describe these five papers that sample the broad possibilities for archive-based social justice research.

24.3.1 Domestic Work During Apartheid

The Apartheid Archive Project (AAP) is an international research effort initiated in 2008 that examines the experiences of racism under South African apartheid (1948–1994), a sociopolitical system that legalized racial segregation to preserve white privilege. The AAP focuses on apartheid as remembered in the narratives of people who lived through it in order to understand how apartheid affected ordinary South African people in their daily lives and its continuing effects today. Its narratives permit the study of the complex relationship among memory, nostalgia, injustice, and guilt.

To examine how people experienced structural injustice in the past and how that past continues to influence contemporary society, Tamara Shefer (University of the Western Cape) studied 17 narratives on domestic workers collected by the AAP. Her 2012 paper, "Fraught tenderness: Narratives on domestic workers in memories of apartheid" examines the complex relationship

among care, intimacy, power, control, and humiliation. These narratives focused on people whose lives were rendered invisible during apartheid. In one narrative a man recalls witnessing the effects of racism on his mother. His account foregrounds how economies of care entwined with the exclusionary policies of apartheid:

> I watched my mother bringing up white kids, serving white people to ensure that we were fed. With each year that passed, I watch her energy slipping away, ounce by ounce… I watched a life of a parent being offered for the convenience of a white person, until there was nothing left. My mother worked for the one family for more than 20 years. When she left their employ, there was no pension, and not even money for a couple of months. She was discarded because they had no use for her anymore. (N31, Black, male, 50s) (p. 311)

As Shefer explains, interrogating the lived experiences of apartheid asks how we, in the present, can achieve "nonracialism, gender equality, peace and justice" (p. 310). Examining the experience of structural injustice alongside institutionalized white privilege, Shefer argues, can aid us in the task of fostering racial justice today:

> A nonviolent and peaceful South Africa requires facing the historical and contemporary renditions of power relations, in their intertwined material, ideological, and psychical forms, so that the humiliations and violence caused by racism become unimaginable. (p. 316)

Shefer's study on domestic workers during apartheid highlights distributive and exclusionary injustice. Distributive injustice is evident in the meager compensation domestic workers received and their poor working conditions. Exclusionary injustice attends to people's experiences within the extremely narrow scope of justice of apartheid. The AAP fosters distributive and inclusionary justice by collecting documents on the human effects of apartheid and making them available to researchers and the wider public on the Web. The Project and its research papers clarify that all South Africans have histories that are important at the individual, family, and national level. These histories allow people today to remember and learn from an unjust past.

24.3.2 Educational Injustice and Queer Militancy

People who identify as lesbian, gay, bisexual, or transgender (LGBT, referred to with the umbrella term, *queer*) have historically experienced discrimination in multiple spheres of society. In a 2010 paper on educational justice, "Doing and feeling research in public: Queer organizing for public education and justice," Erica Meiners (Northeastern Illinois University) and Therese Quinn (School of the Art Institute of Chicago) describe an archive they created to document the marginalization of LGBT individuals and support their activist goals. They investigated the relationship between the privatization of public education and the marginalization of queer students and teachers in Chicago Public Schools, centering their research on three conflictual educational contexts that denigrated homosexuality: (1) military-themed schools within the public school system at a time when homosexuality was illegal in the US military and individuals identified as homosexual were discharged; (2) holding conferences for public school teachers at a private Christian college requiring applicants to sign a pledge stating that homosexuality is immoral; and (3) the removal of sexual orientation and social justice training from teacher accreditation standards.

Meiners and Quinn's archive spanned two years (2005–2007), and it included political campaign letters, flyers, emails, and petitions. As one example, in 2004 the Chicago Board of Education decided to convert part of a public high school to a military-themed school funded with a grant from the local naval base. Opponents to this initiative argued that it would privatize education to serve special interests and marginalize queer students and educators. The archive they created includes a 2005 letter from 53 educators to the Chicago Board of Education explaining their opposition and stating in part:

> Although the Chicago Board of Education, City of Chicago, Cook County, and the State of Illinois all prohibit discrimination based on sexual orientation, the United States Military condones discrimination against sexual minorities… Chicago should refuse to allow the military to recruit in its public schools, and refuse to do business with organiza-

tions that discriminate against its citizens. (Meiners & Quinn, 2010, p. 150)

Consistent with a scholar-activist model, Meiners and Quinn used this archive to build a movement that demanded LGBT students and teachers be afforded the same rights and privileges afforded their heteronormative peers. Thus, the archive was an activist tool that was deployed to contest discrimination.

Meiners and Quinn's work is intended to foster procedural justice by questioning educational procedures and policies that normalize the exclusion of LGBT students. They engage in what Felstiner, Abel, and Sarat (1980–81) have described as "naming, blaming, and claiming" (p. 631), identifying injurious experiences so that they can become more widely understood as grievances warranting broader attention. In their scholarship that documents injustice, Meiners and Quinn seek distributive and inclusionary justice. In this example we see how these two kinds of justice interact when information sharing, a form of distributive justice facilitated by archives, can support inclusionary advocacy in public education.

24.3.3 Land Claims: Ancestral Rights and Historical Injustice

In a 2008 paper on legal and racialized social inequality in the past and present, Sharad Chari (University of KwaZulu-Natal and the London School of Economics) utilized ethnographic methods to document how residents of Wentworth, a suburb of Durban, South Africa, created archives to engage in political work to counter historical and contemporary racism. Wentworth, a township polluted by the petrochemical industry, was developed for Colored[1] people in the 1960s and has been a center of environmental activism in South Africa.

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[1] Social categorizations constructed during apartheid used the term Colored as one of four main racial groups identified by law: Blacks, Whites, Colored, and Indians. Colored describes people of mixed racial/ethnic origin who possess ancestry from Europe, Asia, and various tribes of Southern Africa.

Chari's paper, "The antinomies of political evidence in post-apartheid Durban, South Africa," examines how local environmental justice groups and individuals in Wentworth counter "corporate and governmental obstinacy" (p. S64) by producing archives that they use as tools for environmental activism.

In this study, residents described various environmental efforts including obtaining title to ancestral land that was lost because of long-standing race-based policies of dispossession and segregation predating and during apartheid. Chari interviewed Wentworth residents who sought recompense for lost land holdings through the maintenance of personal archives that included land titles, newspaper clippings, photocopies of book chapters, and objects. These archives were assembled purposefully to speak back to institutionalized racism that had allowed whites, but not people from other racial designations, to own land under apartheid.

Chari described the use of archives to press questions of justice for a Wentworth resident, Louise Landers. Using documentary evidence including her land title documents as well as chapters she has photocopied from books, Landers asserted her family's land before they were dispossessed by the 1913 Land Act. Chari explained:

> What is important is that these and a few other individuals in Wentworth continue to collect historical evidence not just for compensation of loss of land and title, but also to demonstrate the wrongfulness with which these arguments have been dismissed. In this respect, these appeals to historical evidence share common cause with others who maintain documentary evidence of participation in Apartheid and anti-Apartheid politics, in varied ways of claiming the right to political participation. (Chari, 2008, p. S72)

Chari placed Landers's efforts in the sociopolitical context of evidence-based claim-making:

> These limited archiving experiments in Wentworth show how some people try to support their political claims—whether individual or communal—by supplementing notions of agency with the careful maintenance of documents. While Louise Landers maintains evidence of her land claim, she also sees it as part of a broader project of Coloured land

restitution, and she clips newspaper articles on similar restitution and recognition efforts elsewhere in South Africa. (Chari, 2008, S73)

These personal archives, like Meiners and Quinn's (2010), are attentive to social justice process and outcomes. These archives are not intended to be repositories of historical records. Instead they are efforts by people to create tools that they use to redress injustice. In such archives narratives and evidence together reveal a compelling history. Chari's scholarship on the making and using of archives engages with questions of procedural, distributive, and inclusionary justice. The residents are concerned with procedural injustice enshrined in laws and court procedures. Consistent with Shefer (2012), this research also asks: How did procedures and distributions of resources, normalized under apartheid, affect people historically and how do they continue to affect people in South Africa today? The evidence in residents' archives draws our attention to structural injustice in such questions as: Whose claims have legitimacy? Who was allowed to own land? Do such claims rightfully expire?

24.3.4 The Black Panther Party's Community Activism

The Black Panther Party (BPP), prominent in the USA in the 1970s, was stereotyped in the mainstream media as a dangerous and violent organization. These derogatory accounts reinforced negative stereotypes, inflamed fears, and justified undercover surveillance and violence directed at the BPP by the state. Scholarship by Ricky Pope (Western Michigan University) and Shawn Flanigan (San Diego University) focuses on community service activities of the BPP. They observe that service activities by groups willing to use violence are often framed as a utilitarian tool to recruit members.

Focusing on the BPP in the 1970s and using archival material, Pope and Flanigan problematize this "utilitarian notion of service provision" (p. 446) to argue that the BPP's community

programs were intended to support and heal communities burdened with oppressive structural arrangements. Their 2013 paper, "Revolution for Breakfast: Intersections of Activism, Service, and Violence in the BPP's Community Service Programs," describes Pope and Flanigan's examination of archival material on the wide range of BBP social services activities at their Oakland California headquarters. These materials include archival video footage, narrative and personal accounts, and news articles. Pope and Flanigan write:

> The BPP offered a wide range of health and social services as part of its survival programs, including free breakfast programs for school children and food aid for families; schools, adult education, and childcare; medical care, medical research, and ambulance services; cooperative housing; employment assistance; free shoes and clothing; free plumbing, home maintenance, and pest control; and protective escort for the elderly (Hilliard, 2007). (p. 454)

As Craig Rice explained in *The Black Panther*: *Intercommunal News Service* (Hilliard, 2007), a book compiling 20 volumes of the BBP's official newsletter, *The Black Panther* (1967–1980):

> The Panthers… promoted self-defense against hunger, self-defense against addiction, self-defense against poverty. They established programs to address critical issues like the breakfast program for school children and the free health clinics, and gave a voice to those who had never been heard before. (Pope & Flanigan, 2013, pp. 459–460; see Rice, 2007, p. xvii)

These programs were instituted in response to the BPP's understanding that the police did not protect the black Oakland community:

> The absence of police protection and the presence of police oppression is a common theme reported in relation to provision of services by the BPP… On the days that seniors go to the banks to cash their social security and pension checks, they are sometimes mugged. Since the police department does not do its job, we have initiated S.A.F.E [Seniors Against a Fearful Environment]… When seniors asked the Oakland Police Department for more protection, they received only suggestions: "Walk closer to the curb, away from buildings." Recently, the Oakland City Council gave the police department over $455,000 for another police helicopter that will patrol the city from the air while senior citizens are being mugged on the

ground. These acts show the gross unconcern the city government has for the aged. (Pope & Flanigan, 2013, p. 463; from *The Black Panther* [newsletter], Dec. 16, 1973)

What was ignored then as well as now, Pope and Flanigan argue, are the significant contributions the BPP made to the community through programs that addressed chronic hunger and poverty, the lack of police protection, and police brutality.

Pope and Flanagan's use of archival material challenges historic, derogatory accounts of the BPP and provides details on the context in which the Black Panthers worked and their social justice activities. They argue that these activities were undertaken to benefit the larger community rather than to recruit members. Their research highlights distributive justice in two ways. First, it highlights historical distributive injustice in the deficient civic resources afforded the Oakland community. Second, it utilizes archival evidence as informational justice in order to counter past distortions and one-sided accounts of the BPP in the 1970s, representations that justified exclusionary policies then and that hinder a fuller understanding of the BPP's history now.

24.3.5 Social Movements and Political Posters

The Center for the Study of Political Graphics (CSPG) is a California-based archive that collects and exhibits domestic and international political posters on social issues from the late nineteenth century to the present (Wells, 2000). The CSPG has over 80,000 political posters in its collection focusing on human rights, racism, sexism, war, environment degradation, and other social issues. In this social justice graphic archive, the posters are understood as historical records that document people's efforts to make the world more just (CSPG documentary, 2014). In her 2000 paper, "Solidarity forever! Graphics on the International Labor Movement," Carol Wells describes how this collection of posters, which chronicle international and transhistorical social justice and human rights issues, have con-

tinuity over time as social justice movements become influential, recede, and then become relevant again.

Traveling exhibitions of the CSPG have included *All Power to the People*!, a collection of Black Panther Party posters and newspaper graphics produced in the 1960s and 1970s,[2] and *Courageous Voices*,[3] an exhibition on racism, sexism, and human rights (Wells, 1990). Recent CSPG exhibitions include *Out of the Closet and into the Street*, focused on LGBTQ liberation movements nationally and internationally that "connect the celebrations and struggles that have been central to the history of Los Angeles to the broader LGBTQ community, and show the central importance of graphics to educate, agitate and organize.[4]" Another exhibit, *Prison Nation*,[5] included posters of the prison-industrial complex, racial disparities in sentencing, the death penalty, prison privatization, and prisoner re-entry.

Wells (2000) describes the importance of the graphic tradition in struggles for social justice:

> The graphic tradition supporting the rights of workers—especially posters and cartoons—has an unprecedented continuity. Most protest movements are related to a specific event, such as the Viet Nam War, or a topical issue, such as AIDS. Some struggles, such as women's rights, are cyclical and have been 'rediscovered' by subsequent generations. But the labor movement, with all of its changing populations and social conditions, has been producing powerful images throughout the current century, and many decades before. Labor posters cover many human-rights issues confronting society at large, such as sexism, racism, immigration, war (both anti and pro) and the environment. (pp. 509–510)

By documenting social movements through protest graphics, the CSPG encompasses key social justice issues including racism, sexism, war, environmental degradation, exploitative

labor conditions, racial disparities in incarceration, and the violations of human rights. It highlights distributive injustice in the lack of equity and fair treatment.[6] By organizing traveling exhibitions of its archival collections, CSPG makes its collections more available, enacting principles of distributive and inclusionary justice. The generativity and intergenerationality of archival material is particularly evident in the collections and exhibitions of the CSPG. Many of its posters, which are now archival material, drew upon the then-available archival material when they were created.

24.3.6   Contributions of Archive-Based Research to Social Justice

These five studies sample the wide range of archives available that are useful for social justice research from smaller, personal collections to institutionally-based archival material. Utilizing archival material as a primary data source to examine a wide variety of social justice issues, these five papers suggest three ways that archive-based research can further research on social justice.

Changes in norms and values. Each of the papers speaks to changes in justice norms and behaviors over time. For example, archives allowed Shefer (2012) and Chari (2008) to compare present and past. Both scholars document how the injustice of apartheid, which seemingly ended decades ago in 1994, can nevertheless persist in present lives and social relations. Shefer's (2012) layered analysis that examines multiple perspectives across time reveals the complex personal and societal dynamics associated with institutionalized injustice. Chari (2008) discusses contemporary individual-produced archives that address historical and contemporary laws and norms with implications for social justice. Wells (2000) describes an archive that allows researchers to examine activist responses to

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[2] See information on *All Power to the People*! exhibit at http://www.politicalgraphics.org/home.html

[3] See http://www.politicalgraphics.org/cgi-bin/album.pl?album=12courageous_voices

[4] See https://www.politicalgraphics.org/exhibitions/annotations/outofthecloset.pdf

[5] See https://www.politicalgraphics.org/pdf/PRISON%20NATION%20-Gallery%20Guide.pdf

[6] Also see Lau (2013) on the Interference Archive and http://interferencearchive.org

various kinds of social justice issues over time. The many kinds of archives in these papers, including protest posters, narratives about domestic work in the apartheid era, and personal archives on land claim, fundamentally concern such enduring social issues as racism, inequality, and the abuse of power that takes various forms over time.

Constructive effects of archival research. Each of the five papers details the constructive effects of archival research and its potential to redress stereotypes, distortions, and erasures from mainstream histories. For example, Meiners and Quinn's (2010) work on LGBT marginalization and Pope and Flanigan's (2013) work on distortions of BPP history exemplify how archives can foster informational justice, a form of distributive justice that reappraises past stereotypes and contributes new knowledge. The use of archives in these papers provides evidence on contexts and issues missing from the public record. Chari's work (2008) indicates that personal archives can be utilized productively along with other methods (e.g., surveys, interviews) to capture the complexity of lives lived amidst difficult and unjust conditions.

Continuing forms of injustice. All five papers speak to various groups' memories of having experienced injustice. Focused on historical periods, they enrich our knowledge of a past that is relevant today. Shefer's (2012) study of domestic workers' exploitation during apartheid resonates with the plight of low-wage workers throughout the world today. Meiners and Quinn's (2010) paper resonates with homophobia and discrimination against LGBT people that continues to have harmful effects in societies throughout the world. Chari's (2008) research on grassroots archives links historic and contemporary environmental degradation to activist movements in marginalized communities throughout the world. Pope and Flanigan (2013) address distortions in the historical record about groups that were vilified and persecuted as they sought to achieve the wider applicability of social justice. Wells (2000) describes how visual representations have sup-

ported anti-racist, anti-sexist, pro-labor, and other social movements in the past. Visual evidence of these movements in the Center for the Study of Political Graphics Archive can inform and inspire contemporary collective efforts to realize social justice goals.

24.4   Working with Archival Data: Inclusionary and Exclusionary Challenges

Archives offer social justice researchers a rich and varied source of historical data that may be unavailable from other sources. They can provide details on individuals' lives, societal institutions, special events, and historical periods. Like other data sources, archival data have limitations, so this concluding section advises readers about methodological and interpretative challenges of working with archival data.

24.4.1   Methodological Challenges of Archival Data

In archival methods, history and ethics entwine. Archives, regardless of their age or size, offers only a slice of history. An archive cannot capture every event nor can it contain the complete record of every life, organization, or nation. Because an archive's collection is limited to materials originally gathered and later maintained, social justice researchers should be knowledgeable about the archive's history and consider the strength and appropriateness of the available material to answer their research questions (Zaitzow & Fields, 1996).

Over the lifespan of an archive, archivists were subject to influences of the prevailing *status quo*. These may have been reflected in decisions they made about the kinds of materials that were important and warranted preservation. These decisions might later have been revisited as an archive expanded or downsized, resulting in additions to or culling of the collection. Throughout an archive's history, the collection

may also have changed as records were deliberately or inadvertently destroyed, a process called *fragmentation* (Guha, 1997).

Archives contain historic materials that seem to offer incontrovertible evidence of the past. Critical scholars have argued, however, that archives only offer a "professional illusion" (Gilliland, 2011, p. 197) of neutrality and objectivity (Also see Jimerson, 2009; Schwartz & Cook, 2002). Ketelaar (2008) challenges the notion that any set of archival records can be impartial because they include what their recorder recorded as true. Although archives can be authoritative, they cannot claim impartiality as they invariably present a particular perspective of truth and history. Thus, each archive has its own history of inclusions and exclusions that have occurred over generations of archival caretaking.

The Ethical Code of the Society of American Archivists (2012) is attentive to the exclusionary and inclusionary potential of archives, stating: "Since ancient times, archives have afforded a fundamental power to those who control them. In a democratic society such power should benefit all members of the community" (Society of American Archivists, 2012). Like traditional historical accounts that afforded more attention to elites than to ordinary or marginalized people (cf., Newsinger, 2009; Prashad, 2007; Zinn, 1980), archives have often been focused on elite sectors of society. Anne Gilliland (2011) urges archivists to be more attentive to marginalized communities in their work:

> The needs of some communities and individuals whose identities, lives or welfare are implicated with the record will never be equitably addressed without a proactive archival community that many would argue is incompatible with neutrality, but others would argue is the pursuit of social justice (p. 207).

To achieve such social justice goals, the Ethical Code of the Society of American Archivists ask archivists to capture a multiplicity of historical perspectives rather than have a limited base of knowledge. It also urges archivists to make their archives widely accessible to the public so that archives can foster knowledge broadly rather than offering access only to the elite individuals or groups.

In their seminal 1993 Sage methods monograph on archival research, Elder, Pavalko, and Clipp summarize these challenges well: (1) archival data are never precisely what one wants or expects; (2) archival data reflect the perspectives of original investigators; and (3) the rationale for using archival data should be based on the strengths of the data, while aware of its weaknesses.

Therefore, before beginning work with archive-based materials, researchers should be aware of the archive's history and alert to particular material or perspectives that may be missing. Historicizing the archive and its collection permits scholars to interpret key material in light of such questions as: Who created the archive, when, and for what purpose? Who has maintained it and with what resources? Was material lost over time? If so, what, when, and why?

24.4.2 Interpretative Challenges of Archival Data

Drawing on Carolyn Steedman's (2002) work, Maria Tamboukou (2014) describes her archival research on an individual's letters as working with historical fragments and discontinuities that require the interpretation of silences. She observes that the notion of the archive inevitably "operates with certain inclusions and exclusions" (p. 618) that requires the researcher to make interpretative decisions throughout the research process. She states:

> The researcher is always creating an archive of her own, which gradually becomes part of wider fields and bodies of knowledge. It is the researcher's archive, or what I have called 'the researcher's cut', that creates a unity, piecing together archival fragments, theoretical insights, spatio-temporal experiences and material conditions and limitations. (p. 631)

Tamboukou's description implies that, on a smaller scale, researchers' work with archival material mimics the archivists' work in selecting and arranging historical material. Her description

emphasizes that archival research requires researchers to be attentive to inclusions and exclusions in their own process.

Ben Gidley (2012) advises that even when records are missing, partial, or biased, they can reveal a history of injustice when read knowledgeably and critically. In the context of colonial texts, Edward Said (1993) has argued for a contrapuntal reading that takes account of intertwined histories and perspectives even when some perspectives are slighted in the text. To read a text contrapuntally is to read "with a simultaneous awareness both of the metropolitan history that is narrated and of those other histories against which (and together with which) the dominating discourse acts" (p. 51). Said (1993) explains that by "extending our reading of the texts to include what was once forcibly excluded" (p. 66–67), we can place differing perspectives in relation to each other in order to see multiple perspectives represented in historical material (cf., Robbins, Pratt, Arac, Radhakrishnan, & Said, 1994). Because available archival material may over-represent a dominant perspective, it can present a biased view of social justice in past times. A contrapuntal reading of archival material would take account of underrepresented and marginalized perspectives. Correcting for such exclusions in the archival record allows researchers to grasp the experiences and tensions that gave rise to procedural, distributive, or exclusionary injustice in lives, in society, and in the historical record.

24.5 Conclusion

As valuable informational repositories, archives offer social justice researchers details about justice norms and behaviors in periods when injustice was perpetrated or protested. The archival record is astonishingly rich and deep but it is also limited. Although it can speak to our research questions, these data had specific meaning at the time they were created and when they were archived. Materials not valued in the past may be absent from the record. Archives offer readers

data but not interpretations. Researchers, therefore, must be knowledgeable about the period under study and careful about imposing meaning from the present onto the past. With these caveats in mind, the analysis of archival data can yield important findings that can expand our knowledge of past social justice and its relevance today.

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Justice and Culture

25

Ronald Fischer

Justice issues are among the most fundamental elements in any human interaction. As soon as two individuals start a relationship or interaction where they want or need to exchange some form of goods, issues of fairness and justice emerge. These exchanges can be material such as trading food, clothes, or tools, or can involve immaterial goods, such as helping each other or sharing information. Imagine two people stranded on an empty island. They need to regulate and solve problems such as the organization of food gathering and how much food each person is allowed to eat. If one gathers the firewood, is the other person allowed to benefit from the fire at night or cook food? Is the effort expanded to gather firewood worth an equal share in any spoils of hunt or should our desert island protagonists give priority to some activities over others? These questions arise in any social interaction independent of cultural context. The desert island example is a simple scenario which is encountered in much more complex forms in social interactions in modern societies. It is no coincidence that Hammurabi's code—one of the earliest surviving

writings from ancient Mesopotamia—deals with questions of paying fair wages, regulating inheritance and making fair decisions in social interactions.

Humans are an ultra-social species. The formation of tight social relationships and the ability to form effective bands of related individuals enabled our survival in prehistoric times. Humans most likely roamed in small bands. Within each band, each band member received enough to get by and the social group helped to ward off predators and enemies. Going all the way back to the beginnings of humanity, all currently continuing human groups and cultures share a concern for justice. Rudimentary justice behaviors can even be observed in higher primates such as chimpanzees, rhesus monkeys or gorillas, suggesting an evolutionary or biological mechanism for justice (e.g., Brosnan, 2006). What is likely to make humans different is our sense of individuality within a social context. Allan Lind (2001) theorized that all humans are faced with the fundamental dilemma of whether they should submit to the group or whether they should retain their self-identity. In most social situations, these two goals are mutually exclusive and individuals need to find a balance. Lind (2001) argued that the best solution to this dilemma is to use perceptions of justice. Justice principles concern boundaries of power abuse, entail criteria for decision-making and adequate

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interactions that limit the potential for exploitation and allow individuals to engage in group activities without the fear that advantage will be taken of them. Therefore, by relying on justice perceptions in social relations, individuals can get a sense of whether they are exploited or whether they are regarded as full members of the social group.

My argument, drawing upon these evolutionary examples, is that justice concerns are universal, independent of culture. Yet, cultures differ in how and when justice issues are addressed and the specific criteria that are used by different human groups to solve justice dilemmas. Studying cultural differences in justice is of great importance given (a) the fundamental nature of justice in regulating human interactions and (b) the unprecedented levels of interactions between individuals from different nationalities and cultures due to globalization and internationalization of business. In the remainder of this chapter, I will explore some of these differences, especially in the context of work relations, where justice issues are probably most salient (e.g., just think of the number of hours each day most people spend at work) and because it is organizational justice that has attracted a large amount of research in the social sciences. In order to understand how culture may influence justice perceptions and justice-related decision-making, I will first differentiate between different components in the justice process.

25.1 Unpacking Justice Perceptions

25.1.1 Level of Abstraction: The How

Justice concerns, actions, and perceptions can be differentiated in a number of ways. First, we may examine justice perceptions in terms of the level of abstractness. Morris and Leung (2000) proposed a two-stage model distinguishing between justice rules and justice criteria. Justice rules are abstract principles that guide decisions, whereas justice criteria are the implementations of any specific rule. Expanding this model, Leung and Tong (2004) added justice practices: the concrete

actions that are used to implement justice criteria. This addition of practices is quite important from a cultural perspective, because individuals may universally prefer a single justice rule (e.g., paying people according to their contribution), but how such a rule is implemented (in terms of the criteria or practices) may differ significantly depending on the local conditions.

25.1.2 Focus on Justice Perceptions: The When

A second distinction was introduced by Cropanzano, Byrne, Bobocel, and Rupp (2001), differentiating temporal aspects of perceptions of justice. The major difference is between evaluations of specific events (event perspective) versus a more global evaluation of individuals, groups, or institutions in terms of their accumulated justice credits (social entity perspective). Event perceptions are evaluations of specific organizational events such as promotion or pay raise decisions at a specific point in time, whereas entity evaluations are global evaluations of social entities such as supervisors, groups, or organizations over time. Research in justice using experiments has typically examined event perceptions (e.g., the fairness of a justice manipulation), whereas entity perceptions are more often investigated through the use of field surveys (e.g., asking individuals to evaluate the perceived overall fairness of supervisors or organizations). Cropanzano et al. (2001) linked these two perceptions back together. First, objective justice-related events are evaluated by individuals (event perceptions) and these perceptions are then cognitively integrated by individuals into global perceptions about a social entity (entity perceptions) (Lind's, 2001 Fairness Heuristic Theory suggests a process mechanism). I argue that this differentiation is important for at least four reasons when we discuss cultural differences. First, it clearly recognizes the difference between the actor (organizational decision-maker) and the perspective of observers, partners, or recipients. Even though, it is a simple distinction, these perspectives are often confused, especially in cross-cultural work

and we need to pay close attention to whose perspective is being studied. Second, individual differences are likely to influence how much people pay attention to justice-related events. For example, there are individual differences in how much people pay attention to violations of justice, so-called equity sensitivity (Huseman, Hatfield, & Miles, 1987; see also Baumert & Schmitt, 2016, Chap. 9 of this handbook). In addition to individual differences, there are also cross-national differences in equity sensitivity (Chhokar, Zhuplev, Fok, & Hartman, 2001; Mueller & Clarke, 1998). Third, the interpretation of justice events by the observer, partner, or recipient of any interaction is important. These interpretations are likely to be shaped by personal, situational, and cultural context variables (Morris, Leung, Ames, & Lickel, 1999). Finally, if individuals perceive some injustice, they will need to decide how to react. Perceived injustice does not automatically translate into behavioral or attitudinal changes. Individuals often have choices about whether and how to react to actions of perceived injustice and these choices (as well as the extent to which people perceive a choice) also differ across situations and cultural contexts. Much cross-cultural research does not consider presence or absence of choice and the nature of choice when individuals are faced with injustice. Individuals in a particular cultural context may not react to an unfair action because of a perceived lack of choice or a perceived inability to express their negative reactions, but nevertheless feel that an injustice was committed. Claims that justice is less important in some cultures compared to others typically ignore the influence of choice and/or situational constraints. It may just be that researchers missed this crucial variable that limits the expression of perceived injustice (which was studied by the researcher).

25.1.3 Dimensions of Justice: The What

A third and classic distinction is in terms of the dimensions of justice. There is now relative consensus in the literature that there are at least three dimensions of justice. Distributive justice refers to perceptions of the distribution of rewards, whether people believe that their outcomes and rewards match their inputs or investments (Adams, 1965). The second component is procedural justice, which is the evaluation of the procedures that determine these outcomes (Thibaut & Walker, 1975). Interactional justice (Bies & Moag, 1986) concerns the treatment of individuals by decision-makers, the extent to which procedures are explained and issues of showing respect and sensitivity in justice-related interactions. Interactional justice elements apply to both procedures and distributive elements. Consequently, Greenberg (1993) argued that there are four different components of organizational justice ordered along two independent dimensions. The first dimension is the traditional differentiation of justice focusing either on procedures or outcomes. The second dimension refers to the focal determinant (either structural or interpersonal). According to Greenberg (1993), procedural and distributive justice are concerned with structural aspects of organizational decision-making. The focus is on the institutional or structural context within which the interaction occurs, e.g., the procedures used to determine an outcome and the perceived fairness of the final outcome. The concept of interpersonal justice in contrast emphasizes the treatment of individuals, examining how the structural elements are implemented in interpersonal interactions. Crossing the two dimensions leads to four justice components: procedural (procedures, structural), distributive (distributions, structural), informational (procedures, social), and interpersonal justice (distributions, social). This unifying framework has helped to clarify how justice perceptions at the entity level can be organized. An instrument measuring these four dimensions has been developed by Colquitt (2001) in US organizations. The most comprehensive assessment of this measure across different cultural contexts was done by Fischer et al. (2011), examining justice perceptions in samples from Argentina, Brazil, Egypt, Indonesia, Lebanon, Malaysia, New Zealand, Philippines, Saudi Arabia, Taiwan, Turkey, United Kingdom, and the United States.

Using state-of-the-art multigroup confirmatory factor analysis, they found strong support for a four-dimensional structure that fitted well across all countries. At the same time, perceptions of justice were found to be more highly intercorrelated in societies where relationships are characterized by inequality and greater group orientation (collectivism). In these more hierarchical and group-oriented contexts, employees may discriminate less between different dimensions of justice and perceive the organization more holistically. Fischer et al. (2011) argued that this pattern fits with extensions of the relational model of authority (Tyler & Lind, 1992). Interestingly, score reliabilities were lower in collectivistic settings, partially explaining why justice effects may sometimes be weaker in some non-Western samples.

25.1.4 Justice Motives: The Why

Finally, individuals may care about justice for different reasons (Ellard, Harvey, & Callan, 2016, Chap. 7 of this handbook). This relates to the larger question that I started the chapter with, namely why justice may be important to individuals. Classic research by Mel Lerner (1971, 1975, 2003) showed that people have intrinsic justice motives when confronted with serious violation of justice, which leads to strong emotional reactions when people are perceived to be suffering. In such high stake situations, emotional reactions such as anger, shame, guilt, disgust, or contempt compel individuals to take actions (Lerner, 2003). Most contexts studied by psychologists today are less dramatic and allow individuals to choose between different alternative courses of action (or evaluation). A number of possible motives underlying justice effects have been debated in the literature (e.g., Colquitt, Greenberg, & Scott, 2005; Cropanzano et al., 2001; Folger, 1998; Gillespie & Greenberg, 2005; Greenberg, 2001; Lind & Tyler, 1988; Thibaut & Walker, 1975). The three most popular explanations have been the instrumental approach (emphasizing a human concern with control over outcomes, e.g., Folger, 1977); the relational or group-value approach

(emphasizing identity concerns such as self-worth, esteem, and acceptance by others as communicated by fair treatment; Lind & Tyler, 1988; Tyler & Lind, 1992) and the moral virtue or deontic approach (people care about justice because it reinforces basic values of human dignity and worth; Folger, 1998; see also the earlier work by Lerner, 1971; 2003). More recent theories such as fairness heuristic theory (FHT, Lind, 2001) and uncertainty management theory (UMT, Lind & Van den Bos, 2002; van den Bos & Lind, 2002) combine some of these concerns, by postulating that individuals worry about possible exploitation in their relationships with groups and authorities and therefore monitor justice as a means of gauging whether they can trust particular groups and authorities (see for example, Jones & Martens, 2009). The central tenet of these theories is that humans have a need for predictability and uncertainty reduction.

These different justice motives can be distinguished into more specific motives which then may be related to several of the four justice dimensions discussed in the previous section (e.g., Barry & Shapiro, 2000; Jones, Scarpello, & Bergmann, 1999; Kim & Leung, 2007; Shapiro & Brett, 1993). For example, procedural justice has strong links to both instrumental control and noninstrumental belonging motives (e.g., Barry & Shapiro, 2000; Shapiro & Brett, 1993). As a consequence, the debate has therefore shifted to the question of the relative ordering of these needs (e.g., Colquitt et al., 2005; Cropanzano et al., 2001; Gillespie & Greenberg, 2005). There is some emerging consensus that there are a number of basic needs or goals underlying justice concerns which are then translated into more specific needs or goals during particular interactions with decision-makers. Gillespie and Greenberg (2005) listed belonging as the most important motive, whereas Colquitt et al. (2005) added security (comprising both trust and uncertainty) as a second basic motive. Assuming that these two goals are the most basic goals, they may then be expressed in terms of control, esteem, or morality concerns within more specific justice-related events and encounters. The examination of justice

motives shows much promise for understanding variability in justice perceptions and justice effects across cultural contexts (see Fischer, 2013a). Next, I briefly examine psychological approaches to culture.

25.2   Culture in Psychological Research

Culture is incredibly difficult to define, with many divergent and contradictory definitions being used in the social sciences (Faulkner, Baldwin, Lindsley, & Hecht, 2006). In cross-cultural psychology research, which is what this chapter draws upon, culture is typically defined as a shared meaning-system within a population which is passed on through generations (Fischer, 2012a). The assumption is that values, beliefs, norms, and attitudes are shared among individuals in the same culture (see Fischer & Schwartz, 2011 for a critical examination of this assumption). Following Hofstede's (1980) seminal study, cross-cultural researchers have focused primarily on values as central elements of culture to help us to understand how cultures differ (Smith, Fischer, Vignoles, & Bond, 2013). Values are defined as motivational goals that function as guides in life to select courses of action and to evaluate people and events (Fischer, 2013b).

A number of major dimensions have been described over the years. The most fundamental and central dimension of culture is the extent to which individuals see themselves as independent and autonomous or as part of a larger group. This dimension is most commonly called individualism–collectivism (Hofstede, 1980). A second dimension concerns the distribution of power within social groups. Individuals may be seen as moral equals and little hierarchical differentiation exists between individuals within groups or there may be marked status hierarchies that separate individuals within the same group. This dimension is often called power distance (Hofstede, 1980) or Hierarchy (Schwartz, 1994). A third dimension, that will be relevant for the discussion in this chapter, concerns the extent to which uncertainties in life are acceptable and tol-

erated versus people trying to strive for certainty and structure in their lives. This dimension is called uncertainty avoidance (Hofstede, 1980). A final dimension, that will be relevant for the discussion in this chapter, is the extent to which individuals and groups emphasize competition and success versus harmonious relations. Hofstede (1980) called this dimension Masculinity–Femininity (Hofstede also included gender relations and gender-definitions of occupations in his original definition), but I prefer the label Mastery versus Harmony (used by Schwartz, 1994). Hofstede (1980) developed the first widely used set of dimensions. Other dimensional systems do exist (notably House, Hanges, Javidan, Dorfman, & Gupta, 2004; Schwartz, 1994; see reviews in Smith et al., 2013) and they typically converge with Hofstede's dimensions. I used the terms for cultural dimensions in previous research. There has been some debate about whether the value dimensions that individuals hold and the value dimensions of cultures as systems are similar or different (Hofstede, 1980; Schwartz, 1994). If the value systems of individuals and cultures are different, we cannot draw any parallels between individual and culture-level processes and processes at one level cannot be extended to the other level. Fortunately, more recent examinations of this issue suggests that individuals and cultures actually share similar dimensions of values, making it possible to discuss individual and culture-level processes together (Fischer, 2012b; Fischer, Vauclair, Fontaine, & Schwartz, 2010; Fischer & Poortinga, 2012; see the review in Fischer, 2013b).

In addition to these psychological dimensions of culture, economic differences need to be considered. Justice in most social settings is about distributing limited resources. The economic conditions of the system within which the exchange is taking place is likely to impact how decisions are made and how individuals will react to these decisions. At the most fundamental level, market integration or the extent to which individuals are integrated into a money economy that structures social relations in terms of economic value is likely to shape decisions. There is some evidence that this is a fundamental dimension

that differentiates traditional hunter-gatherer and foraging cultures from cultural groups living in modern nation states (Henrich et al., 2010). Among market economies, the extent to which wealth is distributed equally or whether there are large income inequalities is also likely to play a significant role. If individuals are accustomed to large wealth inequalities, they may judge unequal distributions differently to individuals who live and work in egalitarian settings. In addition to these wealth inequalities, the overall wealth in a society is also likely to shape justice decisions and perceptions. If the average level of income is sufficient to meet basic needs, justice processes may operate differently compared to contexts where the average level of income is so low that basic needs are difficult to be met. These economic variables are closely interrelated with cultural value dimensions at the nation level, with higher average income typically being associated with more autonomous, individualistic, egalitarian, and more uncertainty tolerant values at the nation level. Income inequality is typically associated with power distance and hierarchy values as well as more conservative and collectivistic values (see Smith et al., 2013 for a general review of the literature).

25.3 A Cultural Framework of Justice

As discussed above, justice can be examined in terms of questions of what, when, how, and why. These questions can be related back to each other. Decision-makers have options for resolving organizational and social dilemmas. The selection of criteria and practices are at the discretion of the decision-maker, but are also shaped by the social and cultural context. These decisions are evaluated by individuals affected by those decisions. Over time, individual evaluations are integrated into entity perspectives about the overall organization. People are concerned about justice for at least two major reasons (belonging or security concerns) which shape what justice elements in an interaction are being paid more attention to. Furthermore, the emerging perceptions can be differentiated in terms of the four dimensions of

justice (distributive, procedural, informational, and interpersonal justice). These justice perceptions of both events and entities may or may not be translated into actions, depending on the situational constraints and the choice of the perceiver. See Fig. 25.1 for a visual depiction of these links, which provides a general framework for examining the various points where culture becomes important for understanding justice processes. The figure serves two purposes in the current chapter. First, it gives an overview of the justice areas and processes covered in this chapter. Second, it provides a general framework that integrates various models of justice perceptions and reactions in the social, organizational, and cross-cultural justice literature. The major premises are as follows. The larger country-level environment influences the institutional context and the decision-makers within it as well as the salient needs that employees feel. Decision-makers in an organizational context will apply some rules and criteria that need to be put into practice in the specific context. These actions create events that are noticed by employees and are subsequently evaluated and cognitively integrated into entity perceptions about the organization and decision-maker that will lead to some reactions, if there is perceived injustice. These evaluations, perceptions, and their cognitive integrations are again shaped by the values held by the employees. I will discuss these various elements and their flow in the following sections of this chapter. This general framework therefore helps to understand where and how culture may play a role in the justice processes.

In the final part, I will briefly summarize some of the key studies that have examined cultural questions in justice judgments. I separate the discussion by the dimensions of justice and level of abstraction. I finish by discussing justice effects.

25.4 Distributive Justice

25.4.1 Distributive Justice Rules

Equity theory (Adams, 1965) remains the dominant theoretical approach to distributive justice (see Jasso, Törnblom, & Sabbagh, 2016,

Fig. 25.1 Frame of justice and culture
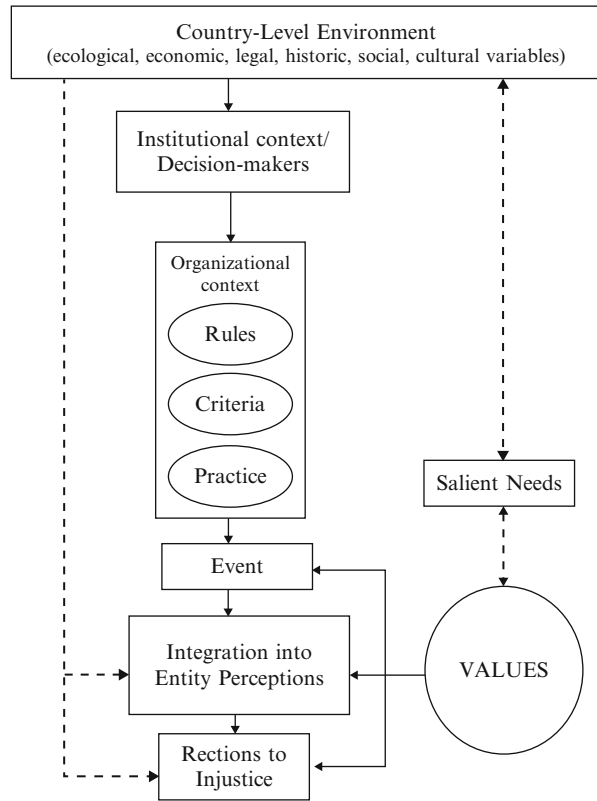
Chap. 11 of this handbook). Following a long line of previous work by philosophers and social scientists, Adams postulated that individuals compare their ratio of inputs and outcomes in social interactions with those of others. Applied to organizational settings, the most likely and relevant situation is where employees evaluate the outcomes that they receive based on management decisions. In other social interactions, partners may evaluate how much they have contributed to their relationship and whether they receive sufficient returns for their investment. Later work by Deutsch (1975) introduced other rules, including equality (all individuals receive the same amount, independent of any other distinguishing features) and need (allocation to the most needy, independent of work performance). Other rules such as seniority have also been studied in cross-cultural research (see Fischer, 2008 for a review).

Leung (1997) reviewed the available literature and came to the conclusion that equity is

universally preferred in business settings (see also Deutsch, 1975). However, a more systematic review and meta-analysis of 25 experimental studies by Fischer and Smith (2003) challenged this earlier conclusion. The meta-analysis demonstrated consistent and significant cross-cultural differences in equity over equality (measured as the relative allocations of grades, points, or money in laboratory settings). These differences systematically varied with levels of inequality across societies. Equity was more often used in samples coming from nations in which income was distributed unequally and in which power was distributed unequally. Extending this work to organizations using survey methods, Fischer et al. (2007) measured perceptions of organizational allocations in samples from the United Kingdom, the United States, East and West Germany, New Zealand, and Brazil. They found that higher Mastery values (values emphasizing achievement and demonstrating success; Schwartz, 1994) at the country level

were associated with greater use of equity. Both dimensions emphasize a differentiation of individuals based on their status and abilities. These studies have all used an event focus. In a different meta-analysis of survey studies capturing an entity perspective, Fischer and Maplesden (2006) aggregated survey-based measures of distributive justice (commonly conceptualized as tapping equity, with work effort as relevant input) among employees (thus, excluding experimental studies and student samples). Examining levels of reported distributive justice across 30,528 employees from 29 nations, levels of perceived distributive justice covaried with indicators of collectivism and power distance. Therefore, the findings across these various studies are quite consistent, independent of whether the focus is on events or entity perceptions. Equity becomes more prevalent in contexts where hierarchy, dominating others and fitting into conservative and close-knit groups are culturally emphasized.

Equality has been studied less frequently. One of the few studies that asked employees to state whether equality had been used as a decision-criterion in organizational contexts (Fischer et al., 2007) reported no cross-cultural differences in perceived equality-based allocation across six nations. Equality could also be inferred from decisions in economic game studies. One common economic game involves participants dividing a sum of money between themselves and another person. These so-called dictator games show significant variation in equality across populations that vary in the level of integration into a market system (Henrich et al., 2010). Individuals from groups that use hunting and gathering as main form of subsistence (compared to working for a wage) are more likely to keep larger amounts of money for themselves. The lowest levels were observed among the nomadically foraging Hadza from Tanzania and the Tsimane from Bolivia, individuals gave just over 25 % to their partner. Individuals from wage-earning groups share about 45 % of the money, which approximates an egalitarian division. Studies like the one by Henrich et al. (2010) demonstrate the importance of market integration

as a mechanism underlying cultural differences in equality between hunter and gatherers and individuals making a living by working for money. We know relatively little about variation among individuals from cultures living in modern nation-states who earn a living by going to work. Given the importance that rhetoric of equality has in many philosophical and religious teachings, it is surprising how little work has been done on equality as a decision rule. More work is needed to examine how equality is used in both organizational and social contexts.

In contrast, need has been examined in a number of cross-national research. Both laboratory studies with students (e.g., Berman & Murphy-Berman, 1996; Berman, Murphy-Berman, & Singh, 1985; Chen, 1995; Giacobbe-Miller, Miller, & Victorov, 1998; Murphy-Berman, Berman, Singh, Pacharui, & Kumar, 1984) and surveys of business employees (Fischer, 2004; Fischer et al., 2007) suggest quite substantive differences across cultures. Some of these differences may be related to economic variables, specifically unemployment rates (Fischer et al., 2007). A clearer understanding of the economic context on decision-making is needed. In the current context of economic scarcity, this should be a major priority because decisions focusing on need affect the most vulnerable members of society.

25.4.2 Distributive Justice Criteria

One of the obvious gaps in cross-cultural research has been the lack of attention to distributive justice criteria that can be used for implementing rather abstract justice rules. Most importantly, the equity rule is open to various interpretations and can be implemented differently across situations and individuals. Adams (1965) was explicit in its broad format, discussing various potential inputs (e.g., effort, education, experience, age, attractiveness) and both positively (e.g., pay, various benefits, rewards intrinsic to the job) and negatively valenced outcomes (e.g., poor working conditions, monotony, fatigue, uncertainty, insults, rudeness). Being a perceptual ratio in people's minds as well as a

form of a social contract, individuals may cognitively shift their ratios by altering inputs or outcomes or they could use these ratios as a base for negotiating the relevance of these various inputs and outcomes for any given exchange. This flexibility of the original equity formulation allows for significant variation in the form of ratios across cultures. The existing literature has focused quite narrowly on work-related effort as input and material benefits such as pay or promotions as outcomes.

Various different rules such as seniority (age) or need and even equality can be reintegrated with equity. I discuss some of the previous cross-cultural work first before outlining how these studies may fit a broader equity rule.

Focusing on age or seniority first, what makes seniority interesting is that it is both an egalitarian as well as a differential allocation principle (Martin & Harder, 1994). Seniority in organizational contexts implies equality because all employees are treated equally and it is up to the individual to decide to stay in the company and gain the benefits of seniority in the long run. At the same time, it is also a differential rule because of emphasizing exactly these individual differences. Rusbult, Insko, and Lin (1995) argued that seniority might be "a temporarily extended version of the equality rule (i.e., a rather long-term version of turn-taking), if a member remains in the group long enough, he or she eventually will reap the benefits accruing to senior members" (p. 26). Fischer (2009) in a study with German, US, British, and New Zealand employees demonstrated that allocation based on seniority was more often found in organizations that were rated as more egalitarian, supporting Rusbult's extended equality argument at the organization level. In contrast, across cultures Mendonca and Kanungo (1994) suggested that status and position as reward criteria will be more acceptable in higher power distance nations. A number of studies with students reported greater use of seniority in Asian samples compared to US samples (Chen, 1995; Hundley & Kim, 1997; Rusbult et al., 1995). Other studies with actual employees suggested that traditional preferences for seniority may be decreasing in Chinese samples (Chen,

Wakabayashi, & Kakeuchi, 2004). Fischer (2008) found no significant relations between power distance and the frequency of seniority-based allocation across studied businesses in the United States, United Kingdom, New Zealand, and Germany. Nevertheless, Fischer reported a link with uncertainty avoidance: greater uncertainty avoidance was associated with greater reported use of seniority. As mentioned above, uncertainty avoidance is the cultural tendency to avoid ambiguities and uncertainties in everyday life and to rely on the tried and tested (Hofstede, 1980). Rewarding seniority is one way to increase the familiarity of organizational members and to reduce uncertainty by relying on those who know the system well.

Turning to need, one of the important questions that has not been well addressed is how we should define need and what is legitimately considered needy in various cultural contexts. Experimental studies have manipulated need quite differently, including descriptions of poor financial situation and family illness (e.g., Murphy-Berman et al., 1984), being either single, married with one child and two incomes or married with two dependents and one income (Giacobbe-Miller et al., 1998) or in terms of age or in terms of justified or unjustified debt (Kashima, Siegal, Tanaka, & Isaka, 1988). This last example highlights that some principles may be overlapping, because age has been considered part of the seniority principle as discussed previously, but it could also be conceptualized as a form of need in some cultures.

These ambiguities in past research raise the legitimate question of (a) whether justice rules and the associated criteria are empirically independent of one another and (b) the extent to which they are all extensions of a general equity principle, assuming different inputs are relevant in different cultural contexts. Even equality can be conceptualized as a special form of equity, with equity being the equality of outcome per unit input (Rutte & Messick, 1995). Equality can only be judged in relation to some standards (some relevant inputs or outcomes). Leung (1997) originally argued that collectivists are more egalitarian with their in-group members

who have an equal status, whereas they use more differential norms with outsiders. Examining this argument from an equity perspective, group membership can be seen as the relevant input in an exchange situation, meaning that all members of an in-group receive the same reward.

I argue that different justice criteria in previous cross-cultural research can be effectively subsumed under one general rule of justice. It is more parsimonious and practically relevant to use one single rule and examine how it is implemented differently across cultures (e.g., what inputs are considered relevant to an exchange relationship). From a practical perspective such a reorientation provides a more useful frame for decision-makers in social contexts (e.g., managers, administrators). It allows people with decision power to ground any discussions around a common theme that is communicated to all and use the same underlying principle (equity). The important task then is to negotiate culturally relevant input and outcome criteria with affected individuals (e.g., staff, beneficiaries). Such a reorientation and reinterpretation allows for an effective strategy for appreciating and dealing with cultural differences. If there is an underlying principle that all individuals can relate to, this could be emphasized to highlight the overall similarity and create a common shared identity. Negotiating what is considered relevant in a given situation at work or other social settings is more easily achieved compared with a situation where decision-makers are confronted with seemingly exclusive and nonoverlapping justice rules or criteria that show no immediate room for agreement. This idea obviously needs further discussion, but could open the avenue for more effective management of culturally diverse groups and for an integration for currently diverse streams of research.

25.4.3 Distributive Justice Practices

Research on cultural differences in practices is largely missing from the literature. Distributive practices have not been systematically investi-

gated, we do not know how individuals perceive these criteria and this provides a major avenue for further research. Coming back to my previous argument, the implementation of justice rules and criteria could be examined from an equity perspective in which case context-specific practices need to be negotiated between parties in a social exchange.

25.5 Procedural Justice

Much of the research on procedural justice across cultures has been studied as part of conflict and negotiation research (see Leung & Stephan, 2001), an area that has attracted a significant amount of research and has addressed a large number of additional questions. Here I will primarily focus on justice issues arising in organizational settings as part of organizational decision-making.

25.5.1 Procedural Justice Rules

Leventhal (1980) discussed a number of procedural rules, including impartiality, consistency, acting on accurate information and allowing opportunities for correcting decisions. Thibaut and Walker (1975, 1978) suggested the additional procedural control rules of decision control (the extent to which any of the involved parties can unilaterally determine the outcome of the decision) and process control (the amount of control over the process, e.g., the development and selection of information that serves as a basis for the final decision). Folger (1977) relabeled this latter process as "voice."

There is some evidence of cultural differences in relation to voice or process control. The classic study by Thibaut and Walker (1975) that introduced the concept of procedural justice to the literature was based on differences in judicial systems in the United States, France, and West Germany. Thibaut and Walker (1975) had hypothesized that procedural justice preferences are culture bound and shaped by the legal system of the country in which individuals were residing.

However, they found strong preferences for high process control irrespective of where individuals were living. Similarly, when asking individuals about justice preferences, Cohn, White, and Sanders (2000) found relatively few cross-cultural differences in a study of nationally representative samples in Bulgaria, Hungary, Poland, Russia, France, Spain, and the United States. The one cultural difference found was that in Eastern and Central European nations, being consistent and following labor regulations had a stronger effect on justice perceptions than in Western European nations and the United States. One plausible explanation is that leaders following formal rules in Eastern European contexts that are characterized by nepotism and corruption (Pearce, Bigley, & Branyiczki, 1998) are seen as more positive. Similarly, in a study with students in the United States, Mexico, The Netherlands, and the United Kingdom, Price et al. (2001) reported no differences in voice effects. Therefore, these recent studies suggest a strong support for the importance of voice as a central element of procedural justice.

25.5.2 Procedural Justice Criteria

As discussed above, procedural rules can be preferred universally but actual criteria for implementing such abstract rules such as voice or lack of bias might be quite different. The negotiation and conflict resolution literature is more advanced in this area than the procedural justice literature (Leung & Stephan, 2001).

25.5.3 Procedural Justice Practices

Similar to distributive justice research, there is hardly any research on the procedural justice practices (implementations of procedural criteria) across cultural contexts. I propose some potential cultural processes and dimensions that may be important. For example, the cultural dimension of universalism versus particularism (Trompenaars, 1993), which forms part of a larger complex of individualistic versus collectivistic

value distinctions, appears important. In universalistic settings (for example, Germany is often cited as a universalistic country) rules are applied consistently and no variations due to situational demands can be justified. In contrast, in particularistic settings (such as Brazil) rules in specific situations might be more liberally interpreted. The Brazilian concept of *jeitinho* is an interesting, yet controversial example. In Brazilian society, rules and regulations are easily broken if the interaction partners are willing to do so. This form of behavior might be construed as corrupt from a Western perspective, but in a highly bureaucratic and centralized setting it may be the best strategy to get things done effectively and efficiently, at least in the short term. What is important to note here is that these practices may be temporally effective, but they may not be seen as fair. Research by Ferreira, Fischer, Porto, Pilati, and Milfont (2012) suggests that Brazilians are engaging in these behaviors frequently, but do not like to admit doing so and clearly attach some negative stigma to these behaviors. The culture-specific implementation of abstract rules and criteria is a rich area for further research.

25.6 Interpersonal Justice

Interpersonal justice as discussed above can be differentiated into an interpersonal behavior component (enactment of procedures and interactions with decision-makers) and an information component. Although it may be seen as a universal philosophical rule to treat individuals with respect and dignity, Fischer and Maplesden (2006) in their meta-analysis found that across 67,060 participants from 23 countries, greater power distance (Hofstede, 1980) was associated with lower levels of interpersonal justice. Individuals in hierarchical societies did not report feeling as fairly treated by their supervisors as individuals in more egalitarian settings. From this study it is unclear how these interpersonal justice rules were implemented and there may be considerable differences across cultural contexts. In Pacific Asia, the concept of face is very impor-

tant and may strongly determine how respect is shown to other people. These behaviors may be highly contextual, depending on the status of the interaction partner and whether the situation is public or private (for a review see Smith et al., 2013). A seminal study by Smith, Peterson, Misumi, and Tayeb (1989) investigated whether a supervisor discussing a worker's problems with co-workers behind the person's back was considered acceptable or not in various contexts. Showing the cultural dependency of implementation of abstract rules in specific situations, such behavior was seen as acceptable in Japan and Hong Kong, but not in the United States and the United Kingdom. Similar to the other justice dimensions, to date we know very little about the culturally appropriate implementations of interpersonal justice practices. The culturally appropriate application of rules and criteria in specific situations is a fertile ground for future research.

25.7 Justice Perceptions

In the sections above, I examined the use of justice rules and their implementation through criteria and the behavior of decision-makers. The experience and perception of these events by employees is the crucial issue. Much of the research was based on evaluations. These evaluations in turn may lead to behavioral and attitudinal reactions. Yet, how individuals perceive events is relatively understudied. For example, Fischer and Smith (2004) in a study with UK and German employees found that similar decisions can be perceived quite differently depending on the value orientation of individuals. Individuals who endorsed self-enhancement values (emphasizing power and achievement values; Schwartz, 1992) perceived allocations using equity as fairer than those who endorsed self-transcendence (emphasizing social care of both close and distant others). Seniority was also seen as fairer by those with self-enhancement values compared with those emphasizing self-transcendence. This demonstrates that events may be perceived quite differently by individuals and that these perceptions are partly shaped by personal and cultural value orientations. This can create significant

challenges in various social situations. For example, leaders in multicultural work teams have to manage expectations and perceptions of a diverse work group. Leaders in society need to engage with different communities that will evaluate their actions differently depending on their cultural value orientations. Couples may start a conflict because one partner's actions are interpreted differently due to slightly different value priorities of the other partner.

25.8 Reactions to Perceived Injustice

Having discussed the decision-making processes and the evaluation of events in terms of justice, I am now turning to the effects of justice on work behavior and motivation, an area that has generated significant interest within Western nations (Cohen-Charash & Spector, 2001; Colquitt, Conlon, Wesson, Porter, & Ng, 2001, 2013). At the same time, this wealth of research generated in studies conducted in samples from the United States and Western Europe may not be generalizable to other contexts. An increasing number of studies has demonstrated that employees in samples from Taiwan (Farh, Earley, & Lin, 1997), Hong Kong (Lam, Schaubroeck, & Aryee, 2002), China (Begley, Lee, Fang, & Li, 2002; Brockner et al., 2001; Tyler, Lind, & Huo, 2000), UK (Fischer & Smith, 2006), former East Germany (Fischer & Smith, 2006), Turkey (Erdogan & Liden, 2006) and the United States (Tyler et al., 2000) are influenced differently by justice perceptions, depending on their value orientation. However, the nature, direction, and explanation of such effects are debated (Fischer, 2008). In the following sections, I will outline some of these contradictory findings.

At the individual level, most of the research has focused on power distance (e.g., Begley et al., 2002; Brockner et al., 2001; Lam et al., 2002). Moderation effects with both increasing and decreasing justice correlations at higher levels of power distance have been reported. Brockner et al. (2001) argued that in high power distance contexts, justice does not matter as much as people do not expect justice (a normative

explanation). However, the same pattern could be explained from an uncertainty perspective (e.g., Lind, 2001) in that procedural justice in high power distant cultures does not provide informative value about inclusion and respect in groups as people are firmly integrated in hierarchies already. An opposing relationship based on control motivations was proposed by Lam et al. (2002): individuals endorsing power distance values should react more strongly to procedural justice as they need to monitor potential exploitation by distant supervisors.

Some other research (e.g., Brockner, De Cremer, van den Bos, & Chen, 2005; Farh et al., 1997; Fischer & Smith, 2006) has also examined individualism–collectivism, independent–interdependent self-construals, and other related value dimensions at the individual level (openness to change, traditionality) that differentiate the individual from the group. Similar to power distance, findings have been found in both directions, with some people finding that collectivist values strengthen procedural justice effects as experienced justice affirms basic moral values held by collectivists (Brockner et al., 2005), whereas others reporting that more modern (individualistic) values strengthen justice effects (Farh et al., 1997). Hence, previous research has primarily focused on power distance and collectivism, but patterns have been relatively inconclusive (see Fischer, 2008 for a more detailed review).

Integrating work on justice motives with these differences in justice reactions, Fischer (2013a) tried to bring some clarity to this research. The key theoretical contribution was to link cross-cultural differences to justice concerns of belonging and control that I outlined above. The central premise is that if justice concerns are related to human needs, then these effects can be expected to be stronger or weaker depending on the context, because different contexts will make different needs salient (Kenrick, Griskevicius, Neuberg, & Schaller, 2010). Linking this thinking to cultural and economic differences, individuals in different cultural and economic contexts may exhibit different justice–work attitude relations as their needs are assumed to differ and they should consequently pay differential attention to viola-

tions of various justice dimensions. This argument draws upon previous work examining attitude–behavior relations (e.g., Boer & Fischer, 2013) that demonstrated that attitude accessibility strengthens the attitude–behavior link. In summary, Fischer (2013a) argued that the salience of justice-related needs and motives within a cultural context strengthens the link between justice perceptions and work outcomes. If individuals are working within a cultural environment in which certain motives such as belonging are central in people's life, then the link between justice and work outcomes should be strengthened, if a particular justice dimension is related to a need for affiliation or belonging.

These arguments were broadly supported in a 3-level meta-analysis with 54,100 participants from 36 countries. Justice correlations varied substantively across cultural contexts, but macro-economic income inequality and country-level values were systematically related to this variability. Assessing the pattern of associations with contextual variables provides useful insights into the motives and concerns underlying justice effects in a global context.

One of the key findings was that people care about justice because it addresses their affiliation or belonging needs (see the discussion above about the importance of affiliation or belonging needs). Both procedural and distributive justice correlations with OCB, satisfaction and withdrawal as well as interpersonal justice correlations with satisfaction were strengthened in contexts where collectivism was high. These findings suggest that all three justice dimensions communicate symbolic values of belonging and inclusion to employees. This is a major insight into the motives underlying justice effects, especially because distributive justice effects are often discussed as mainly driven by instrumental and control motives. People do care about the fairness of distributions for noninstrumental and relationship reasons, even if the justice dimension has clear economic implications. Material outcomes communicate important messages about one's status and level of inclusion in a group.

Fischer (2013a) also found strong support for control motives. A relatively consistent and stable

effect of income inequality for procedural and interpersonal justice correlations with work outcomes was found. In contrast, income inequality did not moderate correlations of distributive justice with work variables. Fair procedures ensure fair outcomes in the long run, so employees can expect that fair procedures will increase positive work outcomes such as satisfaction and trust (explaining the absence of distributive justice effects). Similarly, interpersonal justice increased commitment and satisfaction and decreased withdrawal intentions in countries where income is unequally distributed. Complementing the findings that distributive decisions about money, salary, and the like can have symbolic value about one's social belonging to a group, both procedural and interactional justice also have important instrumental concerns (e.g., Shapiro & Brett, 1993).

These findings help bringing together a diverse set of findings and demonstrate that meta-analyses can generate new findings by pointing to important moderator variables that went unnoticed in previous research. The overall pattern found in the study shows that material concerns become important for employees if they are located in a context in which relative income inequalities are salient. Future research should pay more attention to these instrumental and materialistic concerns in addition to relational and belonging concerns, especially in the current economic conditions and in light of the strong economic inequalities that exist in many majority world countries.

25.9 Areas for Future Development

As should be clear by now, culture influences how justice processes are operating. Justice is probably one of the most fundamental psychological mechanisms that influence the bonding of individuals into social groups. Individuals around the world care about justice. But how these processes play out is shaped by a complex set of social, economic, and cultural variables. I have highlighted some areas that need particular attention. Most notable is our lack of understanding of

how abstract principles are implemented in the form of culturally relevant justice criteria and practices. To date, we have only anecdotal evidence of how justice rules are implemented. I also put forward some ideas of how distributive justice research could be integrated by reexamining equity theory.

I also reviewed a number of studies that have demonstrated how the larger socioeconomic and macroeconomic context influences justice processes. I am convinced that greater attention to these contextual factors can provide useful insights into basic justice processes. Given the nature of justice, I think it is particularly interesting to focus on the economic context, especially in relation to organizational justice research. Organizational decisions are not made within an experimental vacuum, an insight that is often missing from much contemporary justice research. Given the emerging research on the effects of justice on other nonmaterial variables such as health and well-being, it would also be interesting to examine these relationships from a cultural (or broad contextual) perspective. In short, we have gained tremendous insights over the last few decades, but our quest for understanding (and applying) justice theory continues.

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Between Relative Deprivation and Entitlement: An Historical Analysis of the Battle for Same-Sex Marriage in the United States

26

Ella Ben Hagai and Faye J. Crosby

> To ask whether a society is just is to ask how it distributes the things we prize—income and wealth, duties and rights, powers and opportunities, offices and honors. A just society distributes these goods in the right way; it gives each person his or her due. The hard question begins when people ask what people are due, and why.(Sandel, 2009, p. 19)

Discussions of justice are difficult, as Sandel (2009) points out. Perhaps even more difficult are discussions of justice in close relationships like families. Any discussion of justice and the family poses fundamental questions to the scholar who must ask not only "What is justice?" but also: "What is a family?"

The roles of people within the family structure have changed dramatically in the last century. Shifting understandings of age, race, gender, and sexuality have changed the expectations for which unions should be considered a family. In this chapter we contextualize the discussion of justice and family in historical processes. We take key analytical concepts from the paradigm of justice research, including entitlement, scope of justice, relative deprivation, and procedural and restorative justice, and use them to analyze the dramatic process in which same-sex marriage became legal in the United States.

Our analysis suggests that gains by social movements, such as the civil rights and feminist movements, increased a sense of relative deprivation among gay and lesbian people. This sense of deprivation led to the emergence of an "out and proud" gay and lesbian liberation movement. This movement focused on changing notions of entitlement among gay people and lesbians themselves, and resulted in gains in terms of individual rights. On the other hand, the AIDS crisis and the Lesbian Baby Boom of the 1980s created a sense of relative deprivation less in terms of individual rights, and more in relation to gay and lesbian family rights. This sense of deprivation led to a new social movement that focused on changing notions of entitlement of gay and lesbian families among members of society at large. Ultimately, the acceptance of a gay and lesbian right to marry was based on both procedural justice and restorative justice claims. Members of the public, as well as Supreme Court judges with libertarian values, accepted same-sex marriage based on a procedural justice orientation, while members of the public and Supreme Court judges with liberal values accepted same-sex marriage based on a restorative justice orientation.

Our chapter offers no comprehensive review of studies on same-sex families, nor does it document how different people assess the fairness of how

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societies treat different types of families. The points on which we focus are not intended to comprise an exhaustive list of relevant ideas, but rather are meant to illustrate how analytic concepts central to justice research can increase our understanding of one of the more dramatic social changes towards increasing social inclusion of our time.

26.1 Conceptual Groundwork

As Skitka and Crosby (2003) note, contemporary social scientific studies of justice tend to fall into three types: studies of distributive justice, studies of procedural justice, and studies of retributive or restorative justice. Of course, any one issue can be analyzed in terms of distributions or procedures. Any discussion of distributions and procedures can assume that the social actors start with a clean slate and no grudges or "scores to settle"; or it can assume that the social actors are in the midst of an ongoing struggle as to the proper distribution of resources in society.

Entitlementand deservedness. The distribution of resources, and the judgment of the justness of this distribution, depends on notions of entitlement and deservedness. According to O'Brien and Major (2009) "entitlement and deservingness are affectively laden cognitive judgments that someone, or some category of people, should receive a particular set of outcomes by virtue of who they are (entitlement) or what they have done (deserving)" (p. 428). Notions of entitlement are associated with whom the actor is, and notions of deservedness are associated with what the actor should receive. Changing social categories such as that of woman and man, or gay and straight, changed the entitlement of differently gendered actors. The analytical tools of entitlement and deservedness are associated with concept of moral communities and the scope of justice. According to Opotow (2006), not all beings are considered to be within the scope of justice and receive a just treatment. Currently, plants, animals and to some extent children are not seen as fully within the scope of justice. Thus,

the same norms of justice are not ascribed to them (Opotow, Gerson, & Woodside, 2005).

Allocation principles. Different notions of entitlement and deservedness associate with different rules for the allocation of resources. As Deutsch (1975) famously pointed out, the three most common rules of distributive or allocative justice—equality, equity, and need—tend to be invoked in different circumstances. Equity (by which outcomes and inputs are to be proportional) tends to occur in arm's-length or business relationships while equality is the principle most often used among friends. Need is the principle of allocation (give the most to those with the greatest need) most often used in intimate relations where there are unequal dependencies, as for example, when children are dependent on their parents. Some empirical work has verified Deutsch's contention that the circumstances tend to dictate the rules (Prentice & Crosby, 1987).

Relative Deprivation. Judgment of the fairness and justness of different allocation procedures is often subjective. The concept of relative deprivation has been used to describe situations in which actors feel they are deprived because they compared themselves with better rewarded groups or individuals (Crosby, Pufall, Snyder, O'Connell, & Whalen, 1989). Tyler and Smith (1995) pointed out that in a time of relative increase in economic and social well-being, political movements for minority rights are more likely to gain momentum because members of these groups compare themselves to other thriving groups. Traditionally, the social psychology of social justice has approached each problem as if the parties involved had no prior history of injustice. Yet, in actual life, people remember old wounds and old blessings too.

Despite the very great advances made in the social science of social justice, many questions remain to be investigated. Looking at the process in which same-sex couples entered the scope of justice helps us to clarify how justice is expended to different kinds of families.

26.2   Justice for families within society

In this section of the chapter we outline in broad terms the history of changing laws and changing mores regarding same-sex families in the United States of America. The process that occurred in the United States is different than the processes that legitimized same-sex couples in Latin American countries, Europe, and other parts of the world. For instance, while in Western and Northern European countries, parliament and governments legitimized same-sex couple's rights since 1989. In the United States, like in other more religious countries, there has been a dramatic push and pull in the fight for gay and lesbian rights, especially because the goal of the movement was not same-sex unions but rather marriage equality (Dupuis, 2002).

Also, unique to the United States, is a system in which states have judicial process separate from the federal government. In the United States (and elsewhere) laws have different and sometimes battling jurisdictions. Sometimes jurisdictions correspond to regions: there can be laws and ordinances that cover cities, counties, states, or the entire United States. In the United States, by custom, the 50 separate states have each developed "family law," and the federal government has often explicitly ceded authority to state law when the issues in question concern the family. Laws in the United States also have distinct bases for their legitimate authority. For both state and federal laws, laws can originate in one of three ways: indirectly from the populace—as voted for by the legislature, or, more recently, as voted for directly through ballot measures; from the courts; and from the executive branch. Traditionally, the populace has been the most conservative; the courts have been the source of some innovation; and executive orders have allowed for the most radical changes (Crosby, 2004). Again the potential for conflict arises as laws originating from one authority (e.g., Congress) can be challenged through another authority (e.g., the courts).

26.3   The Beginning of Our Story: Extreme Repression

To trace the process in which gay and lesbian families become recognized in the United States, we take as our starting point the 1950s. As American men returned from World War II, and women returned home from factories which had supported the war effort, the nuclear family became the imperative form of the American family (Pfister & Schnog, 1997). It was only after World War II that people began to equate the family of two heterosexual parents, one to three children, a pet or two all living in one dwelling with "the traditional family" (Crosby, 1991).

26.4   Outside the Scope of Justice

During the 1950s and 1960s, same-sex desire was understood by the mainstream American society to be deviant. Same-sex desire, couples or families, existed outside of the scope of justice. Gay and Lesbian people were considered to be a threat to "normal" families and to society at large. Both the American Psychiatric Association and the American Psychological Association (APA) categorized same-sex desire as abnormal or perverse. Political persecution was rampant. Senator McCarthy attacked homosexuals as being a threat to the American way of life, and individuals with same-sex tendencies were categorized as a security threat and were fired from their governmental jobs (because they could be blackmailed to hide their sexual encounters). Sodomy was illegal in 50 states by the end of the 1960s (Johnson, 2009). The understanding of same-sex desire as perverse and as a risk to American society, positioned gay and lesbians outside of the moral community. Norms of justice, including freedom and equality were not extended to involve same-sex romantic relationship and those who were found to engage in same-sex intercourse were punished.

Sexual orientation was not the only dimension of repression in the United States following World War II. Racial oppressions, among others, were

also strong (Tong, 1997). It was not until 1967 that miscegenation laws were finally struck down. In 1958, Mildred Jeter, a black woman, and Richard Loving, a white man, got married. Their home state of Virginia had miscegenation laws, and they were sentenced to a year in jail. Virginia Judge Leon M. Bazile wrote in his ruling: "Almighty God created the races white, black, yellow, Malay, and red, and he placed them on separate continents…The fact that he separated the races shows that he did not intend for the races to mix" (Tong, 1997, 117). Jeter and Loving fought the ruling all the way to the U.S. Supreme Court. In 1967 in the case of *Loving v. Virginia*, the Court prohibited states from using race as a category for the granting or denying of marriage. Unanimously, the Court forbade the use of race-based distinctions in matters of marriage. The *Loving v. Virginia* case was the result of a shift in the United State from understanding race as essential to individual's character and as determining people's place in society to moving in a more "color blind" and a multicultural approach to race. The Court's decision to legitimize mixed-race families *foreshadowed* the legal recognition of same-sex families. The social changes brought about by the Civil Rights movement led to a change in how African American people were seen, and thus their entitlement and deservedness. The shift, changed race from being a central category signifying an essential difference, to race as a cultural category that should not legitimize inequality in the eye of the law.

26.5   Coming out after Stonewall: Changing How We See Ourselves

Our historical analysis of the lesbian and gay movement using the lens of justice research, suggest that the 1950s and 60s reflected a time of prosperity in the United States which led many minority groups to demand equal allocation of rights. As one group, such as feminists or African American gained rights, other groups also were inspired to demand their own rights. The increase in prosperity and egalitarian social change pro-

pelled a process in which relative deprivation sparked a social movement towards more equal allocation of resources (rights) for gay and lesbian people. Because gay and lesbian, at that time, were seen as perverts and as queers, the first step taken by gay leaders was to change notions of entitlements and deservedness. Like the Black Pride Movement the Gay Pride Movement, aimed to change the manner in which gays and lesbians were seen by themselves and by society. At this points the allocation demands of gay and lesbian people focused on equality for individuals, later they will focus on family rights.

The Stonewall Riots of 1969 served as a watershed event. The Stonewall Riots galvanized the gay liberation front, leading to the formation of gay liberation groups throughout the nation. Harvey Milk an important gay leader of that time, called his followers to come out, saying: "Every gay person must come out. As difficult as it is, you must tell your immediate family. You must tell your relatives.… Once they realize that we are indeed their children, that we are indeed everywhere, every myth, every lie, every innuendo will be destroyed once and all. And once you do, you will feel so much better" (Stewart, 2003 p. 213). In June, 1970, on the anniversary of the Stonewall Riots, the first Gay Pride march occurred in Chicago, Illinois (Klarman, 2012). Gay liberation activists, such as Harvey Milk, aimed to liberate gay and lesbian from the sense that same-sex desire was a perversion or a disease. By making their desire public gay and lesbian were to develop a more healthy identity and feel better about themselves.

Unlike earlier periods, the 1970s marked a time when people with same-sex desire sought to change the system rather than to change themselves to adapt to the system. Legal and political advocacy organizations were founded to attempt to shift how gays and lesbians were treated by the law. During this time, activists emphasized that homosexuals have the same rights of sexual self-expression as heterosexuals. Same-sex sexual activity was no longer classified as sexually deviant. In 1973 the American Psychiatric Association changed the mental disorders classification in the Diagnostic and Statistical Manual, and 2 years later the others followed suit.

Table 26.1 Key events on the road to same-sex marriage

	Pro-gay events	Antigay events
1950s	1950—Mattachine Fraternity gay men secret society is founded	1950—Lavender scare: 190 Individuals are dismissed from their government jobs on account of having same-sex attraction
	1954—The Daughters of Billitis, a lesbian rights' group, is founded	1953—President Dwight Eisenhower signs Executive Order 10450, banning homosexuals from working for the federal government
	1958—The first pro-gay US Supreme court ruling in the case *One, Inc. v. Olesen*. "One: The Homosexual Magazine" wins the right to be distributed by the US Postal Service	
1960s	1961—The state of Illinois becomes the first state to remove sodomy law from its books	1966—A gay bar Black Cat Tavern in Silver Lake, Los Angeles, is brutally raided by the police
	1969—Stonewall riots, groups of gay men and drag queens riot in response of a police raid	
1970s	Throughout the 70s antisodomy laws are repelled in 20 states including, Connecticut, Colorado, Oregon, Delaware, Hawaii, Ohio, South Dakota, Wyoming	1977—The Arkansas legislature recriminalizes same-sex acts between consenting adults. This is seen as the first event in the backlash against gay and lesbian rights
	1970—First gay pride marches are conducted in New York, Los Angeles, and San Francisco	1977–1978 Ordinances prohibiting discrimination based on sexual orientation are repealed one by one in cities and counties such as St Louis, St. Paul, Wichita, Eugene, and in Dada county Florida
	1973-The American Psychiatric Association removes homosexuality from its DSM-II	1978—State Sen. John Briggs introduces a ballot initiative to ban gay teachers from teaching in California's public schools
	1974—Openly gay politicians such as Kathy Kozachenko of Anne Arbor. Elaine Noble of Massachusetts and Harvey Milk of San Francisco are elected to public office	1978—In San Francisco, Mayor George Moscone and city Supervisor Harvey Milk are murdered in city hall by another city Supervisor Dan White
	Throughout the 70s cities, counties and states such as Detroit, Santa Cruz, New York, San Francisco, and Minneapolis pass antidiscrimination on the basis of sexual identity ordinance. Pennsylvania becomes the first state to issue a ban on employment discrimination on the basis of sexual orientation	

	Pro-gay events	Antigay events
1980s	1980—The Democratic National Convention declares its support for gay rights	1980—San Jose and Santa Clara County in California repeal their gay rights ordinance
	1982—Wisconsin becomes the first US state to ban discrimination against gays and lesbians	1981—First published report of deaths associated with AIDS appears in a medical publication
	1983—Berkeley becomes the first city in the United States to allow for same-sex couples domestic-partner benefits including health coverage	1982—A policy stating that homosexuality is "incompatible" with military service lead to the dismissal of 17,000 soldiers throughout the decade
	1986—Becky Smith and Annie Affleck from California became the first lesbian couple able to jointly adopt	1984—San Francisco Department of Public Health closes the city's bathhouses with the hope of reducing the spread of HIV
		1985—The first test to detect HIV is licensed in the United States. By the end of the year, 6000 die of AIDS, and 12,000 cases are diagnosed
		1986—*Bowers v. Hardwick* case, US Supreme Court upholds Georgia law forbidding oral and anal sex between two men
		1987—New Hampshire issued a statute banning LGBT adoption
1990s	1991—Karen Thompson is named legal guardian of her partner Sharon Kowalski, 8 years after a car accident left her paralyzed	1993—"Don't ask don't tell" becomes law. The law instructs military personnel not to mention same-sex orientation
	1993—A judge in the Hawaii state high court declares that the state doesn't have the right to discriminate against same-sex couples, by preventing them from getting married	1996—The Defense of Marriage Act (DOMA) becomes law. The law defines marriage as a legal union between one man and one woman. No state is required to recognize a same-sex marriage license from out of state
	1999—The Vermont Supreme Court rules that the state must grant gay and lesbian couples the same rights as heterosexual couples	By 2000, 31 states pass laws associated with DOMA. Among them are Alaska, Arizona, Delaware, Georgia, Idaho, Illinois, Kansas, Michigan, Missouri, North Carolina, Oklahoma, Pennsylvania, South Carolina, South Dakota, and Tennessee
	1999—California establishes a domestic-partner registry and grants hospital-visitation rights to same-sex couple	

	Pro-gay events	Antigay events
2000s	2003—The US Supreme Court strikes down Sodomy Laws	2000—California passes Proposition 22 restricting marriage to same-sex couples
	2003—Michigan Supreme Court approves same-sex marriage	2004 President George Bush declares his support for a constitutional amendment defining marriage as being only between a man and a woman
	2003—California passes Domestic Partnership Law	2004—California Supreme court orders a halt and then voids same-sex marriages license distribute in San Francisco by Mayor Newsome
	2004—Mayor Newsome begins distributing marriage license to same-sex couples in San Francisco approximately 4000 same-sex couples get married	2004—Voters in Missouri restrict marriage to being between a man and a woman
	2004—A county clerk in New Mexico begins issuing marriage licenses to same-sex couples	2006—Voters in Alabama Idaho, Colorado, South Dakota, South Carolina, Tennessee, Virginia, and Wisconsin approve changing their state constitution to restricting marriage to a man and a woman
	2004—The mayor of New Paltz, New York begins marrying same-sex couples	2008—California voters approve Proposition 8; thus changing California's constitution to ban same-sex marriage
	2004—A Seattle judge approves same-sex marriages	
	2006—First country in Africa, South Africa approves same-sex marriage	
	2008—Connecticut Supreme Court allows marriage for same-sex couples	
	2009—Iowa Supreme Court overturns ban on same-sex marriage	
	2009—Vermont Legislature legalizes same-sex marriages	
	2009—Maine Governor signs a bill legalizing same-sex marriages	
	2009—New Hampshire legalizes same-sex marriages	
	2010—District Judge Walker rules California's Proposition 8 unconstitutional	
	2011—US President Barack Obama directs the Department of Justice to stop defending the DOMA law in court because the administration understands it to be unconstitutional	
	2011—New York state legalizes same-sex marriage	
	2012—For the first time same-sex marriage is legalized by popular vote in Maine, Maryland, and Washington	
	2013—US Military affords some marriage benefits to same-sex partners	
	2013—Rhode Island legalizes same-sex marriage	
	2013—Delaware becomes 11th US State to legalize same-sex marriage	
	2013—Minnesota becomes the 12th US State to legalize same-sex marriage	
	2013—France and the United Kingdom legalizes same-sex marriage	
	2013—US Supreme Court determines that aspect of the Defense of Marriage Act (DOMA) unconstitutional since it discriminates against same-sex marriage. The same day the court also overturns California's Proposition 8	

Although the sexual revolution of the 1970s may have prompted many individuals to drop their rigid, binary thinking, it prompted other individuals to intensify the battle lines. As Table 26.1 shows, throughout the entire period under review, there has been a noticeable pattern of action-and-reaction, or advance-and-resist. The 1970s were no exception. A general sense of advance in gay rights galvanized a large right-wing Christian movement. At its onset in the late seventies, slogans such as "Save the Family" and "Save the Children" were used to mobilize citizens against liberalizing ordinances and laws.

26.6 AIDS and the Lesbian Baby Boom: Strengthening a Sense of Deprivation

While the 1970s were particularly important in changing the sense of entitlement and deservedness that gay and lesbian people felt, gay and lesbian's achievements of equality before the law was still far away. In the beginning of the 80s, the efforts gay and lesbian activists had invested in portraying same-sex desire in a non-threatening light, took a major blow with the growing reports of a mysterious disease killing gay men. The US government's neglect in treating the AIDS epidemic and the thousands of deaths of gay men that resulted, led to great anger and galvanized a social movement demanding full equality to gay and lesbian people and *families* (Klarman, 2012).

On June 5, 1981, a little-noticed announcement published in the Morbidity and Mortality Weekly Report stated that "5 young men, all active homosexuals, were treated for biopsy-confirmed *Pneumocystis carinii* pneumonia at 3 different hospitals in Los Angeles, California. Two of the patients died" (Bayer & Oppenheimer, 2000, p. 11). This report, together with a growing number of instances of gay men dying from rare cancers, pneumonia, or other diseases related to immunodeficiency, heralded the beginning of the AIDS epidemic.

At first, AIDS was little understood, and was termed the "gay cancer." The disease spread rap-

idly among gay men. In 1983, 71 % of the 3064 reported AIDS cases were among gay and bisexual men. In 1985 the number of reported AIDS cases climbed to 8094; 73 % of the reported cases were of men who reported having sex with men. Two years later in 1987, the reported AIDS cases more than doubled to 20,428, and 71 % of the reports involved men who reported having sex with men (Health Resources and Services Administration (HRSA, 2010). Despite minimal governmental support for research on the syndrome, in 1984 groups of scientists in France and in San Francisco discovered the HIV virus causing AIDS.

Legally, too, the 1980s presented a regression in the legal recognition of same-sex desire. In 1982 the police arrested Michael Hardwick, a bartender from Atlanta, as he was engaged in sexual activity with another man in the privacy of his own home. Hardwick filed suit claiming that the police had infringed on his right to privacy. In the *Bowers v. Hardwick* decision, by a 5-to-4 majority, the Supreme Court concluded that sodomy was not a right rooted in the constitution (Mucciaroni, 2008). Writing the minority opinion, Justice Blackmun accused the majority of ignoring the issues of privacy due to an obsession with the question of homosexual activity. (It was not until 2003 that the *Hardwick* decision was completely overturned by the Court in the case of *Lawrence v. Texas*.)

Contemplating her child's birth while mourning the death of a gay friend from AIDS, Cherrie Moraga, a feminist lesbian activist and scholar wrote "is there a kind of queer balance to this birthing and dying…lesbians giving life, our brothers passing" (Moraga, 1997, p. 62, cited in Mezey, 2008). In the 1980s while gay men were suffering from the AIDS epidemic, lesbians were beginning to use advances in reproductive technology to form families and have children. In the 1980s "baby maybe" social groups and widely attended conferences on alternative reproduction in Portland, San Francisco, and New York engaged lesbians with the questions of why and how to bring children into the world (Chauncey, 2004). Advances in reproductive technologies, such as in vitro fertilization (IVF), (whereby eggs

are fertilized in a petri dish, and then injected back to the woman's uterus) and increases in the prevalence of sperm banks made artificial insemination techniques a favorite among lesbians aiming to get pregnant without having sexual intercourse with men (Agigian, 2004). According to some estimates the number of gay and lesbian parents was over a million by the end of 1980s (Chauncey, 2004; Patterson, 1994).

26.7 Procedural and Restorative Justice Reasoning in the 1990s Debate over the Legitimization of Same-Sex Marriage

The AIDS epidemic and the increase in gay and lesbian families pressed the importance of establishing legal recognition for same-sex families. In particular, gay and lesbian couples feared that they would not have rights to care for a sick partner, or to maintain custody of shared children in the event of a partner's death. The 1970s cultivation of gay pride changed gay and lesbian sense of entitlement and deservedness . The trauma of the AIDS crisis and the birth of children to many lesbian couples highlighted the need for *family rights*. The inequalities of same-sex couples led to a sense of deprivation as gay and lesbian people compared themselves to straight couples who enjoyed these privileges. The sense of deprivation because of the inequalities in privileges between heterosexual and homosexual couples led to another wave of activism focused on marriage equality and family rights.

The genesis of the public debate on same-sex marriage in the United States begins with a surprising judicial decision from the state of Hawaii. In 1993, three same-sex couples applied for and were denied marriage licenses from the state solely because of their sex. Together they filed suit under the name *Baehr v. Lewin*. The judge challenged the state of Hawaii to explain to the court why it had discriminated against the couples based on their sex. The state argued that children deserve to be raised by a mother and a father, and by definition same-sex couples can only offer

one of these as a biological parent. Moreover, the state argued that children are better socialized when growing up with both feminine and masculine role models. Circuit Court Judge Kevin Chang concluded that while there are benefits for children in being raised by a mother and a father in a stress-free home, the best predictor for a child's healthy development is a loving and warm relationship between parent and child, regardless of family structure (Dupuis, 2002). Judge Chang, reasoning highlighted the shared humanity of parents, regardless of their gender. This type of reasoning falls into a human rights argument to marriage equality.

Around the same time, an Alaskan court held that the right to choose one's marriage partner cannot be decided by the government. In the Alaskan case, Judge Michalski concluded that "the right to choose one's life partner is quintessentially the kind of decision which our culture recognizes *as personal* and important" (Dupuis, 2002, p. 64). Both the Hawaiian and the Alaskan judges' decisions were soon over turned by popular votes. Nevertheless, the Hawaiian judge's liberal framing of family that included same-sex parents, as well as the Alaskan judge's libertarian justification of same-sex couples in terms of the rejection of governmental intervention, offered authoritative new perspectives that afforded the inclusion of same-sex families in relation to both a libertarian framework and a liberal one.

The two judges, like the Supreme Court judges who would discuss the case later, justified same-sex marriage on two different bases. The liberal Judge Chen justified same-sex marriage in terms of restorative justice, in which gay and lesbian parents' rights were taken away because of their same-sex desire. Judge Michalski, a more libertarian judge, saw same-sex marriage in terms of procedural justice, in which the government and the courts had no right to interfere in the personal decisions of individuals, such as who to marry.

The change in entitlement and deservedness of same-sex couples' rights did not occur without a backlash. The Hawaiian and Alaskan cases sparked the fury of conservatives in Washington. Conservatives saw the valuing of family by gay men and lesbians as a threat to what they called

family values. The conservative backlash led 35 states to alter their laws to define marriage as being between one man and one woman. In the US Congress, Republicans proposed a federal bill called the Defense of Marriage Act (DOMA) in May, 1996. By September of the same year, the bill had been passed by margins large enough to make a presidential veto impossible. DOMA defined marriage as heterosexual and specifically excluded same-sex married couples from being eligible for federal benefits such as survivor benefits and other tax benefits given to opposite sex married couples. In addition no state was required to recognize another state's legitimization of same-sex marriage (Clarkson-Freeman, 2005).

26.8   Supreme Court Debating Same-Sex Marriage

Seventeen years after it was enacted by Congress, DOMA was struck down by the United States Supreme Court. The case was *Windsor v. the United States*, decided on June 26, 2013. All three female justices and two of the male justices found the law to violate principles of equal protection granted by the Fifth Amendment (Liptak, 2013). What was the Windsor case and who was Edith Windsor? In some ways, the story of Edith Windsor resembles the story of gay rights in the United States. Like many other gays and lesbians in the 1950s, Edith Windsor had an affair with another woman, but she fought the tendencies that she thought of as sick. She tried marriage to a man, but the marriage ended in divorce. In the 1960s Windsor finally decided that she couldn't fight her same-sex desire and began clandestinely attending restaurants frequented by lesbians. In one of the restaurants she met Thea Spyer, then a graduate student in Clinical Psychology. After Spyer broke up with her then girlfriend, Windsor rekindled the acquaintance and love developed. Spyer became a prominent psychologist, and Windsor advanced to become a senior programmer for IBM. Although they decided to share their life together, they remained closeted to many in their family and at work (Olafsdóttir & Muska, 2011). At the age of 45 Spyer was diag-

nosed with multiple sclerosis, and Windsor took early retirement from IBM to take care of her. In 2007, Spyer and Windsor were married in Toronto. Although the marriage was recognized in New York, when Spyer died in 2009, the federal government taxed Windsor as if she and Spyer had been strangers. Because of DOMA, Spyer was required to pay $363,053 in estate taxes, money that she would not have had to pay had Spyer been her male spouse (Levy, 2013). Windsor joined the legal struggle for the recognition of same-sex families. Windsor and Spyer's compelling love story of perseverance through illness and paralysis ultimately resulted in a majority of the Supreme Court voting to overturn DOMA.

The Supreme Court decision not only legitimized same-sex couples right to marry but also their right to raise children. In the majority opinion, delivered on June 26, 2013, Justice Kennedy noted that not only was DOMA harmful to adults, it was also harmful to children. Kennedy: "the law humiliates tens of thousands of children now being raised by same-sex couples. The law makes it even more difficult for the children to understand the integrity and closeness of their own family and its concord with other family in their community and in their daily lives" (United States v. Windsor, 2013).

26.9   Public Opinion

The debates over same-sex marriage have led the public to become better educated and perhaps more thoughtful about gay rights. Public opinion studies show that as late as 1990 there was general opposition to same-sex marriage across political lines and age groups. Slowly, highly educated, less conservative, and urban sectors of the population became supporters of same-sex couples' right to marry. By 2010, marriage equality was enjoying wide public support while disapproval had become localized in specific sectors such as Evangelical Christians and Republicans (Baunach, 2012; Sherkat, Powell-Williams, Maddox, & De Vries, 2011). Furthermore, about half of the change in public opinion on same-sex

marriage is attributed to cohort change (Silver, 2013).

Psychologists studying the decrease in prejudice towards gay and lesbians, as well as the increase in support for same-sex couples' rights, suggest several explanations to the public's embrace of same-sex couples' rights. Shifts in understanding "who" gay and lesbian people were influenced public opinion as to their entitlement. The growing prevalence of the belief that gays and lesbians were "born that way" framed being gay and lesbian in terms of being a minority. Whose minority status was grounded in a different genetic makeup (Haider-Merkel & Joslyn, 2008; Hasalm & Levi, 2006; Rutledge, Siebert, Siebert, & Chonody, 2011). The legacy of the Civil Rights Movement and other racial/ethnic political movements of the 1970s led members of the public to reject discrimination against individuals based on their minority status. Consequantly, the framing of gay and lesbians as a sexual minority contributed to public support for equal rights to gays and lesbians. Moreover, many studies have suggested that Harvey Milk's push for the gay and lesbian people to come out allowed more people to get to know and come into contact with "out" gay and lesbian people, and as a result, decrease their stigma of homosexuals (see Herek & Capitanio, 1996). Friendship between homosexual and heterosexual individuals has been shown to correlate with a decrease in heterosexual individuals' antigay attitudes, increased support for LGB rights, as well as becoming politically allied with members of the LGB community (Baunach, Burgess, & Muse, 2010; Herek & Capitanio, 1996).

In addition, changes in how gender roles and sexuality were seen in general influenced how people thought of the ideal family and thus who is entitled to have one. Researchers have established that individuals who reject traditional gender roles are more likely to be less homophobic and to support marriage equality (Ben Hagai, Clark, & Zurbrrigen, under review; Gaines & Garand, 2010; Kerns & Fine, 1994; Kite & Whitley, 1996; Whitley & Ægisdóttir, 2000). Indeed, those who still oppose marriage equality in the United States tend to do regard same-sex couples as a threat to society because they do not follow traditional gender roles. Viefhues-Bailey's (2010) analysis of the rhetoric of Christian conservatives who oppose same-sex marriage shows that they frame good families as necessitating a dominant husband who is supported by a good wife. In such a scenario, the man submits to God, and the woman submits to the man.

Systematic research on gay and lesbian parents began to appear in the late 1970s, and has peaked in the last decade. Most research finds little to no difference between children of gay and lesbian parents compared to children of straight parents, in terms of child development, well-being, and sexual identity (Patterson, 2006). Most research finds that lesbian couples as well as gay male couples tend to share housework more evenly between them compared to straight couples. Gay and lesbian parents are more likely to avoid physical punishment and to use positive parenting techniques such as reasoning with children. Reviewing the psychological research, Stacy and Biblarz (2001) further suggest that the sons and daughters of gay and lesbian parents are more likely not to conform to traditional gender norms. For instance, boys raised by lesbian couples are more likely to be sexually restrained, less aggressive, and more nurturing compared to boys raised by heterosexual couples.

26.10 Concluding Observations

In this chapter we use key concepts from the literature on justice and the family to analyze historical shifts in family dynamics. Using mainly the analytical tools of entitlement and deservedness, the scope of justice, allocation rules, and relative deprivation, we point out several trends. As Tyler and Smith (1995) pointed out in a time of growing social prosperity and an increase equal distribution of rights to minority groups, relative sense of deprivation in terms of one's own group unequal rights leads people to organize and mobilize to win rights. This process associated with the birth of the gay and lesbians pride movement that borrowed the term pride from African American black pride movement. Activism at the early

stages focuses on changing minority group's own sense of entitlement and deservedness. In the 1970s gay and lesbian movements changed how homosexuality was seen from a disease to just another form of sexual desire. Changing understanding homosexuality, and increase pride of gay and lesbian people in themselves, further increase a sense of deprivation especially in the face of the US government's neglect in treating the AIDS epidemic. Government neglect as well as the growth in gay and lesbian families motivated a human rights campaign that sought to frame gay and lesbians' families as a human rights issue. Conservative libertarian judges came to reject the illegality of same-sex marriages based on procedural justice while liberal judges came to see it in terms of restorative justice. Gay and lesbians as well as their alleys long road to changing public opinion from seeing as a threat to the family to having the right for a family moved through a sense of deprivation, to changes in notions of entitlement, to further deprivation and extensions of demands for allocations.

We conclude by returning to our opening observation: how women and men are treated within families relates directly to how families are treated within society. The women's movement challenged strict traditional gender roles. The questioning of traditional gender roles is also associated with decrease in stigma of people who transgress gender roles by having same-sex romantic relations. The changing of meaning and norms around what it means to be "a real woman" and "a real man" contribute to changes in notion of the just distribution of symbolic rights within the family unit. Social changes in gender norms and a growing acceptance of gay and lesbian people, combined with grassroots activism ultimately forced a change in the political and judicial conceptualization of the just distribution of marriage and family rights.

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