Fair Enough? Support for Redistribution in the Age of Inequality

by
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Abstract

The public's reaction to rising inequality has perplexed many. Some commentators find it surprisingly muted and ponder why support for redistributive policies has not increased. Following Donald Trump's election and *Brexit*, others worry that the public's reaction is forceful, but misguided. According to the latter account, immigrants and racial minorities have become easy scapegoats for voters left behind by globalization and technological change.

Fair Enough? seeks to advance our understanding of this multifaceted response to rising inequality. It develops and tests a simple framework for studying mass attitudes toward redistributive social policies. A central claim is that the latter are shaped by at least two motives: material self-interest and fairness reasoning. On the one hand, people support (oppose) policies that, if implemented, would increase (decrease) their own expected income. On the other hand, people also support (oppose) policies that, if implemented, would move the status quo closer to (further from) what is prescribed by shared norms of fairness. Whether an outcome is perceived as fair depends on how well it fits the norms of reciprocity and proportionality. The reciprocity norm applies to institutionalized social solidarity, i.e. policies that cover high-risk individuals irrespective of past contributions, and requires that cooperative behavior be rewarded more than uncooperative behavior (i.e. free riding). The proportionality norm applies to the marketplace and pre-distribution policies and prescribes that rewards be proportional to effort.

Because people hold different empirical beliefs regarding the fairness of the

status quo, they also disagree over which policies to support or oppose. Only when policies are high stakes will individuals consider the benefits of deviating from saying what is fair and express a self-serving policy position instead. Given that beliefs about the fairness of the status quo are often disconnected from an individual's own position in the income distribution, fairness reasoning only incidentally produces the types of policy preferences political political economists and commentators might otherwise expect, e.g. higher support for redistribution among economically insecure voters, or higher support for cuts in taxes and social spending among high-income voters.

Contextual factors affect how material self-interest and fairness reasoning combine to affect policy preferences. *Fair Enough* focuses on three factors: social policy design, supply-side dynamics (e.g. elite discourse), and public finance. The resulting framework helps explain puzzling facts including high levels of attitudinal stability in most post-industrial democracies, a decline in support for redistribution in Great Britain and a decline in the income-gradient structuring support for redistribution in the United States.

Should we expect an increase in support for redistribution in reaction to a rise in income inequality? The book identifies several factors explaining the absence of a thermostatic reaction from the public. One factor is fairness reasoning itself. It introduces a disconnect between economic conditions and policy preferences. Part of the disconnect stems from the existence of *stable* beliefs regarding the fairness of the status quo. Furthermore, in the aggregate, fairness beliefs are more likely to be *enablers* of higher income inequality than to be shaped by it. Another factor is the structure of political competition, which, combined with fiscal stress and ethnic diversity, contributes to the erosion of support for key redistributive features of the welfare state.

Fair Enough? is based on doctoral work that has received the 2016 Mancur Olson Prize for Best Dissertation in Political Economy, awarded by the APSA Political Economy Section. The award committee emphasized its pioneering contribution ”to our understanding of heterogeneity in public responses to the objective increase in inequality, a major policy and political issue of our time.”

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What is Fair?

For most citizens, choosing the policy that aligns with their own material interest is a demanding task. Only in the rare cases when high-stakes policy reforms have credible implications for a voter's pocketbook can one reasonably expect such egocentric and rational behavior. If self-interested reasoning is the exception and not the rule, then what is the rule? As always with human behavior, there are many rules and parsimony requires choosing one among those that matter the most. In this chapter, I make the case for fairness reasoning.

The claim that fairness is important to redistributive politics has been made many times before (Alesina and Angeletos, 2005; Fong, 2001; Zajac, 1996; Blinder and Choi, 1990) and subjective data collected through ethnographic studies and surveys all document the ubiquity of fairness concerns in the realms of pre- and redistribution (Bewley, 2007; Hochschild, 1981; Lamont and Molnar, 2002; Lynch and Gollust, 2010). Yet while fairness is a notion intuitively grasped by all, it is not easy to pinpoint what fairness is and what a positive analysis of fairness might look like. Relatedly, while the research community knows that fairness matters, researchers still struggle to explain why it matters and most importantly, how it matters. As a result, the conceptualization and operationalization of fairness reasoning in the context of redistributive politics remain far from consensual.

In this chapter, I start by defining fairness reasoning in broad functionalist terms, focusing on its role as a social technology articulating the individual to the collective. I build on work in behavioral economics, anthropology and evolutionary psychology to argue that fairness reasoning is central to social life: it helps placate the centrifugal forces of envy and opportunism and, under the right conditions, fosters social order and cooperation while minimizing coercion (Levi, 1991). From this general definition, I derive a simple two-step way of conceptualizing and empirically documenting fairness reasoning "in action."

A first step is to identify the shared principles people rely on when reasoning about the fairness of redistributive social policies. For this endeavor, experimental studies in social psychology and behavioral economics are particularly helpful: they carefully document the existence of a finite set of consent-inducing allocation principles (*norms of fairness* for short). Within Western democracies, there is quasi-universal agreement on what these norms prescribe. Instead, people differ in their empirical beliefs about the prevalence of norm-violating outcomes and behaviors (*fairness beliefs* for short). Fairness beliefs provide individuals with a proto-ideology through which to interpret the world and pick policies that maximize fairness. A second step in the study of fairness in action is consequently to measure these beliefs using survey data and document how they structure mass attitudes toward redistributive social policies.

The first step —identifying a finite set of fairness norms— is the focus of this chapter. The second step —measuring fairness beliefs— occupies most of Chapter 3. Throughout both chapters, I show how the conceptualization of fairness reasoning proposed in this book out-performs competing approaches found in the literature.

Fairness Reasoning: An Overview

Humans are a social and cooperative species. "Without the invention of human society," writes Barrington Moore, "Homo Sapiens might well have become extinct long, long ago." The invention of society meant, among other things, the invention of morality. In line with other positivist studies of morality, I define morality in neo-functionalistic terms, i.e. as a bundle of norms and behavioral traits "selected" over time for their capacity to suppress or regulate selfishness and make social life (and the goods it generates) possible, while still leaving some breathing space for the individual.[1] In other words, moral systems are social technologies that help regulate the constant toggle between cooperation and opportunistic behavior characteristic of social life (Ostrom and Walker, 2003; Levi, 1991), ultimately contributing to social and institutional stability (Graham, Haidt and Nosek, 2009; Binmore, 1994; Gintis et al., 2005; Tomasello, 2016; Baumard, 2016). Like dark matter, a moral system cannot be directly observed or quantified. Instead, its presence is inferred from its effects on human behavior.

There are many types of moral systems. In this book, I am interested in moral systems that shape how members of a group cooperate and settle on an *uncontested* allocation of economic goods.[2] These moral systems take the form of a shared commitment to the same principles of fairness alongside a similar understanding of the situations in which these principles can be called upon. Institutional stability implies that enough individuals 1) share the same understanding of what is fair, 2) care about maximizing fairness and 3) share the perception that the status quo is fair according to this definition. Institutional change implies that enough individuals 1) share the same understanding of what is fair, 2) care about maximizing fairness and 3) share the perception that the status quo is unfair according to this definition. The potential for disorder increases when enough individuals in the group share very different understandings of fairness. In this case, one might even question whether such a group exists as a social entity in the first place. A bimodal distribution of fairness beliefs can also be a source of disorder. In other words, by caring about the *same* rules of fairness, and holding beliefs about the fairness of the status quo, individuals end up playing their part in the maintenance — or orderly change — of the status quo. In contrast, a situation where members of a group care about *different* rules of fairness or hold polarizing beliefs, provides a most-likely case for disorderly contestation and the breakdown of social order.

[1]This neo-functionalist approach to issues of fairness and morality echoes recent contributions in evolutionary psychology and economics. Morality in this line of work is a "solution" to the problem of large-scale cooperation (Curry, Mullins and Whitehouse, 2019).

[2]Another expression found in the literature is "system of justification", see Thévenot and Boltanski (1991); Forst (2014).

Broadly speaking, in the context of redistributive politics, a stable social order is one where two related ideal-typical resource allocation problems have been (at least temporarily) addressed. Specifically, a stable social order is one where there is a widely shared consensus that the solutions brought to these problems, are "fair." In this case, the term "solution" describes the bundle of formal institutions and informal practices that constitute the status quo. The first of the two problems was famously discussed by Rousseau in the *Discours sur l'Inegalite*. According to Rousseau, in societies built on the division of labor and private property, men envy each other, resenting those who have more or feeling pride knowing that they are envied by those who have less. Social order implies the existence of formal and informal institutions that limit the public expression of envy and resentment. In Western liberal democracies, this problem comes with its own specific twist: differences in material resources need to be reconciled with the normative claim that all members of the group are nevertheless equal in dignity and worth. I consequently call this first resource allocation problem the *inequality-among-equals* problem.[3] The second problem to address is that of the provision by the group of basic material security for its members, lest the group not survive temporary material shocks. I call this ideal-typical problem the *social solidarity* problem. In practice the social solidarity problem is at least partially solved when the majority of group members are willing *contributors to* the provision of some form of social insurance (see Levi (1991)) and do not feel resentment towards net-beneficiaries of resource pooling.[4] The existence of a shared understanding of what constitutes fair inequality and fair social solidarity (i.e. shared norms of fairness) helps regulate envy, minimize resentment and promote consensual resource sharing. Social stability is most likely when enough people believe that the status quo aligns with what these shared fairness norms prescribe.

The fact that a moral system helps foster social order and cooperation does not mean that it is inherently good or that no power is being exercised. Indeed, the argument presented in this chapter is compatible with the claim that the moral

[3]For an overview of how different societies have found other solutions to allocation problems, see Piketty (2019) and references provided in this book.

[4]Research has documented the range of emotions underpinning resource sharing and cooperation, most importantly outrage at being taken advantage of (contributing when others are not), shame for failing to "carry one's weight" (not contributing when others are), or outrage at seeing someone "jump the queue" (receiving the same access despite "slacking" behavior).

system discussed throughout the book is an instance of Lukes' third face of power (Lukes, 2004) in the service of a hegemonic ruling class (Gramsci, Hoare et al., 1971).[5] Still, I avoid this language and chose instead to approach these moral systems as social facts.

Jointly, the evidence presented in this chapter and the next, document the existence of an imperative to justify that, under some conditions,[6] compels social agents to reason and behave in ways that conform to what shared norms of fairness prescribe (Thévenot and Boltanski, 1991; Forst, 2014). As a short-hand, I call this behavioral imperative "fairness reasoning," which I define as the thought process through which individuals act as if a third-party judge ruling on the fairness of a given situation and acting to maximize fairness accordingly.

In this section, I have argued that fairness reasoning is the individual-level manifestation of a social technology central to the provision of two types of social goods: social order in the face of inequality and risk management through resource sharing.[7] This social technology combines a general agreement regarding *what ought to be* with shared beliefs regarding *what is.* In the next section, I turn to the task of identifying the finite set of widely agreed upon norms of fairness used to help minimize envy and maximize resource sharing, focusing on the particular case of Western democracies. This task first requires a description of the culturally-specific and historically-situated ways in which the two allocation problems play out in Western democracies.[8]

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[5]However, my argument and findings highlight a degree of pluralism and discretion in how people engage in fairness reasoning that is disregarded by this line of work. In that sense, I am closer to the work of Thévenot and Boltanski (1991) which highlights areas where logics clash and generate critical discourse, without any "hegemonic" over-arching norm or authority of justification.

[6]How this imperative interacts with self-interest is something I will discuss later in the book.

[7]Fairness reasoning is not the only behavioral mechanism helping articulate the self and the group. Other examples include social identity, linked-fate reasoning or socio-tropic reasoning. However, unlike these latter concepts, fairness reasoning has yet to join the political behavior tool box. This omission is in part due to the difficulty of defining, conceptualizing and operationalizing fairness concerns, an issue I take on in this chapter.

[8]Researchers disagree over the fundamental nature of the social technology discussed in this book. To simplify, some researchers emphasize its biological (and ultimately evolutionary) roots, arguing that humans are hardwired to rely on a core set of fairness principles and fairness-related emotions (see Jensen and Petersen (2017); Tooby and Cosmides (2010); Gintis (2016*b*)). According to this line of reasoning, the same core building blocks of fairness reasoning can be identified in many cultures (Bowles and Gintis, 2011; Henrich et al., 2001; Graham et al., 2013). This work is

Fairness Reasoning in Contemporary Western Societies

In Western Democracies, the allocation of economic resources is affected by a complex bundle of institutions and policies (sketched in Figure 2.1). A central distinction is the one made between the "market economy" on the one hand, and the "welfare state" on the other. The former generates market income that is then taxed to fund the social transfers distributed by the latter. The latter organizes social solidarity, i.e. the collective endeavor through which individuals are insured against life's main risks (unemployment, old age, illnesses...). Governments can affect the distribution of income in a given society through three channels: 1) pre-distribution policies, which affect how market income is generated and distributed, 2) taxation policies, which affect how much market income people get to keep, and 3) changes to the design of the welfare state, which affect the extent to which social insurance is redistributive. With regards to the latter, governments can increase the generosity of means-tested benefits, tweak the relative mix of earnings-dependent and non earnings-dependent benefits and change the legal definition of who is included in the welfare state. These design features have important implications for income redistribution. As argued by Esping-Andersen (1990), a welfare state dominated by earnings-dependent transfers ends up reinforcing existing social stratification. According to the "paradox of redistribution" highlighted by Korpi and Palme (1998), while means-tested programs are redistributive by design, too high a share of such programs can ultimately undermine the overall redistributive implications of the welfare state. Ultimately, the design features that contribute the most to decreasing income inequality are those that make social benefits and services accessible to all irrespective of past contributions (e.g. universal access to public healthcare in

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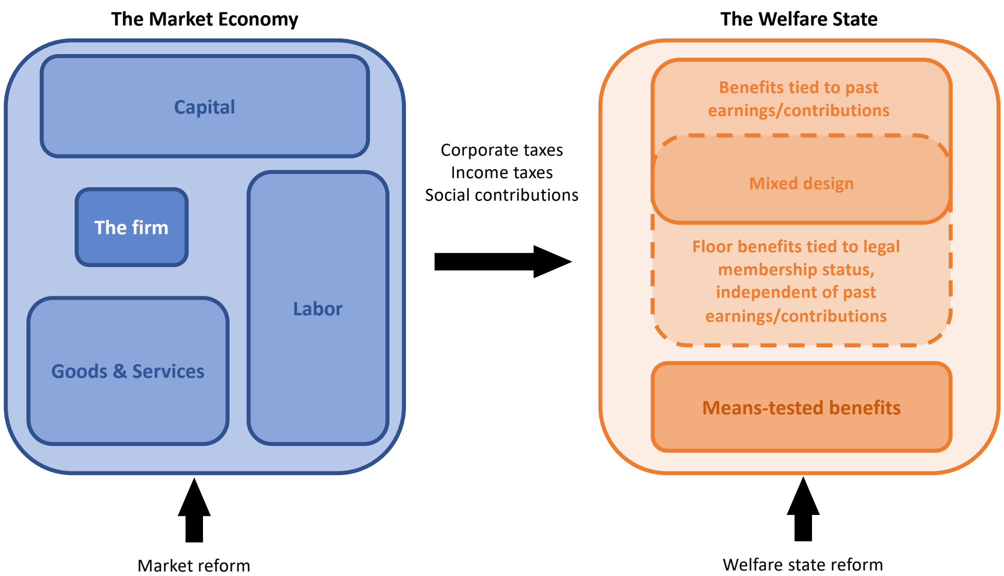
buttressed by findings in child psychology that document the early emergence of fairness concerns among very young children including newborns. Other researchers give more weight to culture than to genes. While humans might be hard-wired to learn and care about group norms, these norms, including norms of fairness, might or might not share common features across cultures (Ostrom, 1998). The approach taken in this book is closer in spirit to the latter school of thought. In the remainder of this chapter, I examine fairness concerns within one relatively homogeneous cultural block, i.e. post-industrial Western societies with large welfare states. While I claim, and show, that Western societies are similar enough to be studied as a whole, I remain agnostic with regards to the applicability of this framework to non-Western societies, and only tentatively extend the analysis to post-communist countries.

Great Britain).

Figure 2.1: Income Redistribution in Western Societies: Institutional and Policy Landscape



The market economy's existence as an autonomous institutional sphere separate from the welfare state is part institutional reality, part shared cultural myth. Similarly, the claim that pre-distribution and taxation policies "interfere" (whether for good or bad reasons depending on one's political leanings) with the "natural" functioning of markets is partly a cultural construct (Vogel, 2018). However, to the extent that I am interested in people's beliefs about the status quo, whether or not this description of the status quo is true is somewhat irrelevant, what matters is that people share this representation of the world.

Social stability and a resilient social insurance system are signs that a majority finds the existing combination of institutions and policies fair, or at least "fair enough," according to shared norms of fairness. In contrast, institutional and policy change follow from a majority perceiving that the status quo is unfair. What exactly does "fair" mean in this context? Or to put it differently, what are the norms of fairness people rely on to justify their support or opposition to status quo-changing policy proposals, whether related to pre-distribution, taxation or social policy design?

A dominant line of research emphasizes the following allocation principle: a fair allocation is one in which economic rewards are related to effort (i.e. "effort pays"). In the words of Benabou and Tirole (2006), support for income redistribution is affected by the views people hold about "the causes of wealth and poverty, the extent to which individuals are responsible for their own fate, and the long-run rewards to personal effort." This common approach to fairness reasoning in Western democracies overlooks several important features of resource allocation in these societies. Once these features are accounted for, a different conceptualization of fairness reasoning emerges.

First, the "does effort pay?" framework does not explicitly engage with the market economy/welfare state dualism sketched in Figure 2.1. A market economy turns people's labor into a commodity, either directly as labor or indirectly through the goods and services they produce, and the welfare state helps people face the socio-economic costs of their commodification. As a result, meaning and status derived from being a "productive" member of society has at leas two distinct sources. One source is an individual's market value made visible to all by one's income. The other is an individual's membership in a resource pool of historically unprecedented scope. Membership (i.e. group boundaries), facilitates resource pooling. Resource pooling is what gives membership its value. A quote by Walzer (1983) succinctly captures this relationship between membership, the welfare state and self-worth:

> Membership is important because of what the members of a political community owe to one another and to no one else, or to no one else in the same degree. And the first thing they owe is the communal provision of (...) welfare. This claim might be reversed: communal provision is important because it teaches us the value of membership. If we did not provide for one another, if we recognized no distinction between members and strangers, we would have no reason to form and maintain political communities.(page 64)

Simply put, there is no resource sharing and risk pooling without a clear understanding of whom is sharing with whom. In contrast, a market economy is an "indifferent association, determined solely by personal preference and market capacity", one "open to whoever chooses to come in."

A second important distinction overlooked by the "does effort pay?" literature is the famous free rider problem, which, while a central concern in the context of resource sharing, is irrelevant to how people interact in a market economy. Indeed, resource pooling and sharing constitute what researchers call a social dilemma: the collective interest does not align with the individual interest. Specifically, all members have an individual incentive to take advantage of the shared resource without contributing sufficiently to its maintenance. Contrast this with market institutions, which are explicitly presented as aligning (and designed to align) the general interest with the individual interest. Writing in the 18th century, Adam Smith famously saw market institutions and the selfish pursuit of one's own material interest as liberating: it was a way to extract individuals from an unequal and oppressive web of interdependence and reciprocal rights and duties. Today, one might say that it is the market economy that, in the common imaginary, has successfully extracted itself from the web of interdependence and reciprocal rights and duties that define social solidarity. Put differently, the market economy has been expunged from the social solidarity problem, only the inequality-among equal problem remains.[9]

As a result, the manufacturing of consent is achieved very differently depending on the institutional realm under consideration. In the market economy, mass consent implies the shared agreement that the status quo abides by what the *proportionality norm* prescribes, namely that rewards be proportional to merit, itself a combination of personal decisions as a free agent, individual work ethic, acquired skills and innate talent. Milton Friedman himself emphasized its centrality to the market economy's system of justification: "payment in accordance to product," he writes, is part of the "basic core of value judgments that are unthinkingly accepted by the great bulk of [a society's] members" and enables "resources to be allocated efficiently without compulsion" (page 167). This is the norm captured by the previously discussed "does effort pays?" literature. But, as argued above, people's experiences is two faceted: what they experience as actors in the market economy is separate from

[9]Some leaders regularly seek to redefine markets in ways that emphasize social solidarity. One example is Obama's controversial "you did not built that" speech where he stated that economic entrepreneurs succeed as a result of others' help and work, partly through the government.The backlash was strong and immediate.

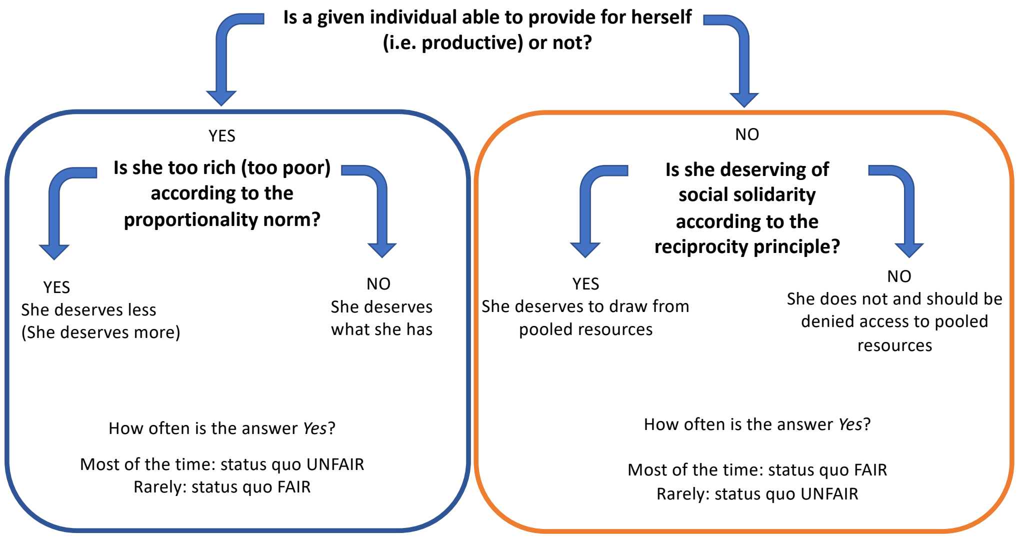
what they experience as stakeholders in a resource pooling effort embodied in the welfare state. This suggests the existence of a second norm, the *reciprocity norm*, which prescribes that all members of a group contribute to the collective effort and that free riding does not go unpunished.

Institutional dualism and normative pluralism have important implications for fairness reasoning and mass policy preferences. On the one hand, policies that affect market institutions and market income are shaped by beliefs regarding the latter's fairness as defined by the proportionality norm (i.e. is market income roughly proportional to talent and effort or not?). On the other hand, policies that affect the welfare state are shaped by beliefs regarding its fairness as defined by the reciprocity norm (i.e. are net-beneficiaries of social transfers mostly undeserving free riders or not?). For some people, proportionality and reciprocity beliefs are correlated. Someone who believes that effort pays (i.e. the rich deserve their higher income) can also believe that net-recipients of social transfers are undeserving free rider who could be self-reliant if they "really tried." Yet, as I will document extensively in chapters 3 through 5, membership considerations and differences in how people react to free riding mean that proportionality and reciprocity beliefs are most often disconnected: the belief that the status quo is fair according to one norm need not imply that the status quo is fair according to the other. In other words, two distinct norms of fairness imply at least two types of fairness beliefs with, I will show, important implications for mass social policy preferences.

Researchers seeking to study fairness in action need to chose carefully the words they use. The distinction between deviations from what the proportionality norm prescribes on the one hand, and deviations from what the reciprocity norm prescribes on the other is partly obscured by the generic terms available to discuss the fairness of a given situation, and relatedly the fairness of the status quo. Specifically, two outcomes can be both judged as fair or unfair with each evaluation referring to different norms of fairness. Relatedly, the same concept of desert or deservingness can apply to very different fairness judgments. Figure 2.2 captures this heterogeneity in the context of the institutional set up sketched in Figure 2.1.

Before I discuss the empirical evidence in support of this framework, a word

Figure 2.2: What is Fair? Who is Deserving?



about alternative ways in which allocation institutions and norms of fairness might combine. For example, under what conditions might the fairness of the market economy be assessed not only in reference to the proportionality norm but also in reference to the reciprocity norm? One example is given by Scheve and Stasavage (2016). They argue that total warfare can turn the sphere of production into an additional front alongside the military front. Total warfare also faces a free rider problem: citizens' individual interest is to defect, at the expense of the collective. In line with the reciprocity principle, their willingness to contribute their blood to the war effort is conditional on the belief that everyone is engaged in a similar sacrifice, i.e. nobody is free riding (Levi, 1991). In such a context, large economic profits are perceived to violate the reciprocity norm: they reflect an actors' selfish economic gains at the expense of the collective (ultimate) sacrifice. According to Scheve and Stavasage, the ability to frame high income earners as war profiteers who violate the reciprocity norm helps explain why some countries were able to introduce wealth taxation while others were not.

Relatedly, the reciprocity norm used to be much more salient in the economic realm in the 60s and 70s. Following WWII, wage labor became the norm. At the same time, long-term reconstruction and growth plans under the leadership of a powerful state turned workers into a distinct class of stakeholders (Przeworski and Sprague, 1988). Economic output was partly understood as a public good resulting from large-scale cooperation at the firm and country-level, under the coordinating power of the state and of economic corporatism.[10] The organization of labor at the firm-level was also different in that period. Wage-setting practices were often similar to those found in state bureaucracies: they under-weighted individual factors such as productivity in favor of collective understanding of worth, such as seniority or a given occupation's centrality to economic production.[11]

In the past three decades, political and economic elites have shifted the emphasis from cooperation to competition: growth models are now built on the principle that growth is at the intensive margin and that markets are much better at doing this than states and centralized collective bargaining . Governments thus endeavor to build institutional environments where these market mechanisms can unleash their full potential. This, in a nutshell, is the mandate of the European Union. The "neo-liberal" turn has often been portrayed as a swing back towards "markets against society" Polanyi (1957), but what we have witnessed since the 1970s might be better described as "society in support of *fair* markets". This latter expression better captures a form of discourse and policies according to which regulations, taxes and transfers are justified as ways to bring economic institutions closer to what is prescribed by the proportionality norm, namely a distribution of economic resources truly proportional to individual merit, and not based on the cooperation of different class of stakeholders. Changes at the firm-level have been especially dramatic. Merit-based pay is now the norm. Workplaces have "fissured" (Weil, 2014; Card, Heining and Kline, 2013), moving closer to Ronald Coase's ideal-typical example of smaller units trading bilaterally through contracts on a market. Large corporations have shed their role as direct employers of the people responsible for their products, in favor of outsourcing work to small companies that compete with one another. The gig economy is the most recent stage in this development. This implies the concomitant retreat of reciprocity concerns and an over-investment in the

[10]These national-level cooperative compromises are well known to students of postwar capitalism.

[11]This institutional set up would ultimately lead Galbraith to develop his concept of 'technostructure," in which managers co-opted labor against the interests of shareholders, with the ultimately goal being the reproduction of what he called the bureaucratic technostructure.

proportionality norm. One implication is the retreat of the kind of critical discourse regarding labor's fair share of profits that was previously enabled by the perception that economic growth was built on interdependence and cooperation more so that on entrepreneurship and decentralized competition.

I am now ready to provide a full definition of fairness reasoning as it manifests itself in Western democracies. As already mentioned, fairness reasoning is the thought process through which individuals act as if a third-party judge ruling on the fairness of a given situation and acting to maximize fairness accordingly. In the context of this book, fairness is maximized by favoring (opposing) a policy change that moves the status quo closer to (further from) what is prescribed by shared norms of fairness. I emphasized two norms of fairness: the proportionality norm –according to which market rewards should be proportional to merit (more below)– and the reciprocity norm –according to which people should contribute to the collective effort unless it mostly benefits free riders–. The proportionality norm, I argue, is most relevant for evaluating the fairness of market outcomes and policies that interfere with such outcomes. Implementing fairness in line with the proportionality norm will mean, for example, opposing (supporting) high taxes because differences in market income (do not) reflect differences in effort and talent. The reciprocity norm, I argue, is most relevant for evaluating the fairness of social insurance in general and the design features that make it redistributive in particular.[12] Doing the "fair thing" in line with the reciprocity norm will lead some to oppose social spending cuts because it unfairly affects "deserving" recipients (more on what deserving means below). Others, in contrast, will support cuts to programs that unfairly reward free riders over those who, in contrast, "carry their weight." This reasoning implies that individuals hold empirical beliefs about the nature of the status quo: while people agree on the two norms –i.e. what ought to be–, they disagree over the extent to which the status quo conforms to what these two norms prescribe –i.e. what is–. In the remainder of this chapter, I review studies documenting the existence of a consent-inducing imperative to behave fairly as defined by the proportionality and reciprocity norms. I leave evidence regarding the differences in fairness beliefs to Chapter 3.

[12] These include means-tested programs as well as the design features that make some social benefits accessible to all irrespective of past contributions (e.g. universal access to public healthcare in Great Britain).

Norms of Fairness: Evidence

In line with the framework of study presented above, I focus on evidence that documents *the existence of a finite set of norms understood in the same way by all involved and behaviorally consequential for all involved.* Empirically, this implies two types of evidence: one documenting universal agreement about a given normative principle, the other documenting the absence of competing norms beyond the identified set. Studies of fairness often rely on ethnographic evidence combined with interviews in which implicated parties are asked to make explicit the reasoning behind their actions. Such research strategy suffers from the usual concerns about competing motives beyond fairness maximization, including material self-interest, or group-specific concerns (e.g. parochial altruims). Furthermore, these empirical strategies do not tell us if people are using the same, behaviorally-constraining fairness *norms*, merely that they are using the same fairness language.

Experimental methods in a controlled setting provide one solution. First, researchers can come up with designs that either neutralize competing motives (participant design versus third-party design), or pit one motive against the other (self-interest versus fairness) to see which one matters most. Second, researchers use experimental variations to document the existence of a shared norm. To understand how this works, one can think of a norm as a mathematical function: the function is fixed ($f(X) = Y$) while the output (Y) varies with the input (X). Specifically the fairness evaluation and the resulting fairness maximizing behavior (Y) vary with people's understanding of the features (X) of the problem under consideration. To study the norm, researchers have two main research strategies available to them. One is to vary X experimentally and examine whether this change affects Y in systematic ways. This gives researchers information on the content of the norm as understood by all participants. Another strategy is to maximize or minimize the differences in how people understand the features of a given situation and see how it affects the variance in Y. If all share the same X and apply the same norm then they should all agree and the variance in Y should be very small. In contrast, disagreement over the X will be reflected in disagreement over the Y. There is by now a large literature across the social sciences that implements these strategies. Below, I review the most important studies, focusing first on the proportionality norm and then on the reciprocity norm. The same studies also show that emphasizing only these two norms covers a lot of grounds: relative to the proportionality and reciprocity norm, other distributive principles (e.g. equality or need) take a back seat.

What Constitutes Fair Inequality Among Equals? The Proportionality Norm

Aristotle famously provided the first known explication of the proportionality principle broadly defined. According to Aristotle, for an unequal division of resources to be fair, individual rewards and punishments have to be proportional to individual contributions to good or bad outcomes. Any division of resources that is not proportional to individual contributions is unfair based on this principle. In the context of a market economy, an individual contribution is any factor that 1) can be attributed to the decisions and actions of a given individual and 2) increases the market value of tradable goods and services. These factors include, effort, talent, skills and individual bets on the future such as saving and investment decisions (or failure to make such bets). There are two main sources of inequality in this framework: differences in individual contributions, assuming all have the same opportunity to make a value-increasing decision, and differences in the opportunity to makes such value-increasing decisions (Cappelen et al., 2007; Almås et al., 2010; Cappelen et al., 2013; Konow, 2003). An overwhelming majority of people find the former fair and the latter unfair in line with the proportionality norm (Frohlich, Oppenheimer and Kurki, 2004; Miller and Komorita, 1995; Oxoby and Spraggon, 2008; List, 2007). This general pattern has been documented experimentally in many different contexts and with different types of individual contributions. In the context of debates over income inequality, references to the proportionality norm take the form of debates over talent, luck, the genetic lottery or the "meritocracy" of the existing educational system.[13]

[13] A recent example is the reception of Piketty's most recent book in the press. In *Capitalism and Ideology*, Piketty defends a set of highly progressive income and wealth taxes. Most responses to the book's proposals make references to the fairness of the status quo as defined by the proportionality norm. Favorable reviews highlight how existing income and wealth distributions have little to do with effort and talent, describing the wealthy as lucky at best or self-interested resource hoarders at worse. Unfavorable reviews challenge this interpretation: according to Raghu Rajam, today's rich are self-made "working-rich", whose wealth derives from their "ability to put resources to good use." Piketty's proposal is unjust and would lead to economic suicide (FT March 7th). Middle-of-

A stylized laboratory game called the Ultimatum Game (UG) provides strong evidence of the importance of the proportionality norm for manufacturing consent. The UG, first developed by Güth, Schmittberger and Schwarze (1982), is a two-player two-stage game, with a Proposer and a Responder. In its most common form, the game proceeds as follows: the Proposer offers a division of a fixed sum to an anonymous Responder who then accepts or rejects the offer. If the Responder accepts, the sum is divided as originally proposed. If the Responder rejects, both players receive nothing. An income maximizing Proposer should always offer the minimum amount and the Responder should always accept (lest they walk away with zero). In practice, the Proposer offers on average a 60-40 split and the Respondent rejects half of the offers that are below an 80-20 split. In the earned variant of the UG, the Proposer has either earned the fixed sum to split with the Responder through her own effort or, in some designs, has earned the right to be the Proposer instead of the Responder. These studies return one consistent result: Proposers offer significantly less than the usual 40% and Responders' rejection rates are much lower.

Differences between the *baseline* and *earned* conditions align with what researchers know about the proportionality norm, i.e. rewards should be proportional to merit. In the baseline condition, the fair thing to do is a 50/50 split, as none of the two players have earned the right to get more. One way to interpret the Proposer's modal 60/40 split is to conceptualize it as a two-step reasoning: she first starts with what the norm prescribes (50/50) and then, from this baseline, tries to maximize her payoff within the constraints set by the norm. Under the assumption of a shared norm, a rational actor seeking to maximize her payoff will pick something higher than 50, but not too high in order to avoid having the Responder enforce the norm by rejecting an offer that deviates too much from it.[14] In the earned condition, one player has worked for the right to have more: the fair baseline split is an unequal

the-road reviews argue that deviations from what the proportionality norm prescribes are not large enough to justify wealth expropriation and make a more moderate case for incremental changes moving the status quo closer to what is "fair" through "market-based inclusiveness" and "stronger link between achievement and reward" (bloomberg).

[14]Early research has interpreted the convergence to something close to a 50/50 split as evidence of an equality norm. Instead, I follow Konow, Saijo and Akai (2008) in interpreting this evidence as merely the implementation of the proportionality norm in a context where individual contributions are equal.

split, with more rewards going to the most productive individual. Because both players abide by a similar fairness norm, the Proposer knows he can be very selfish and yet avoid punishment. Indeed, no shared norms of fairness are broken when she does so and the party with less has no reason to dissent: the outcome is fair. Overall, the existence of a shared proportionality norm, and the knowledge that this norm is shared by all parties, best explains results from UGs.

These experiments have been repeated across many Western societies, creating a patchwork of evidence for the existence of the proportionality norm as an order-inducing form of fairness reasoning allowing members of a group to agree on a given resource allocation. As of writing, the research community still lacks a comprehensive study that would assess the existence of the proportionality norm across a large sample of Western societies.[15] Cross-national surveys provide a useful, albeit imperfect, substitute. If the proportionality norm is widely shared across post-industrial democracies, items that measure agreement with a statement in line with what the norm prescribes should receive overwhelming support. The closest available survey item that directly measures agreement with the proportionality norm is an item from the World Value Survey worded as follows: "Imagine two secretaries, of the same age, doing practically the same job. One finds out that the other earns considerably more than she does. The better paid secretary, however, is quicker, more efficient and more reliable at her job. In your opinion, is it fair or not fair that one secretary is paid more than the other?" This question holds constant attributes one is not responsible for (age, tasks being given to accomplish) and only varies factors one has control over. In all countries, more than 4 out of 5 respondents find it fair that one secretary is paid more than the other. Relatedly, the 2018 wave of the ESS asked respondents whether they agreed with the statement that "(a) society is fair when hard-working people earn more than others." On average over 80% of respondents agree, with a high of 92% in Austria and a low of 70% in the Czech Republic.

A comparative study by Almås, Cappelen and Tungodden (2019) is also very informative. It presents two groups of respondents, one American and one Norwegian

[15] Henrich et al. (2001) famously implemented the baseline UG in 15 small-scale societies, but without the earned condition the interpretation is difficult. The main conclusion is that most societies have a norm in place that requires some sharing. However, what this norm is is impossible to pin down given the design.

(both representative of the overall population),[16] with the same unequal outcome. In this case, the latter takes the form of a pair of real life individuals (recruited on M-Turk) with unequal earnings. Participants in both countries are asked whether they want to redistribute income between the two individuals and if so how. The design ensures that American and Norwegian respondents hold the same priors about the causes of this inequality. Assuming the same priors and the same norm, this should imply the same predictable response in both countries. Researchers experimentally varied the reason why earnings were unequally distributed across the two individuals. In one condition, which they call the merit condition, earnings were unequal because workers differed in productivity — the more productive individual got 6 dollars and the least productive 0 dollars. In another condition, where earnings were different as a result of the luck of the draw, the luck condition, the lucky winner got 6 dollars and the loser got nothing. The respondents had the option to leave the division of resources as such (6-0) or redistribute in one-dollar increments. When luck explained differences in earnings, 76% of the U.S. sample chose some amount of redistribution with 54% choosing to equalize incomes (3-3).[17] In the merit condition, the share of individuals who equalized dropped by about 40 percentage points in both countries. The majority (60% for Norway and 80% for the U.S.) implemented an unequal outcome, with the modal response being, in both countries, the 4-2 split (the most productive gets twice the amount received by the least productive). These results indicate that respondents in both countries contribute, through their actions, to implementing a distribution of resources roughly proportional to the work contributions. Against claims of American exceptionalism, a large majority of American respondents implement some redistribution and more than half implement full equality in the luck condition.

The luck treatment results are worth a brief discussion. In the luck treatment, a larger share of American respondents chose, despite the absence of any difference in work contribution, not to intervene and to leave differences in rewards as is (6-0). This difference suggests that American respondents are less likely to act to correct inequalities due to luck. One possible reason behind this difference is American respondents' interpretation of the randomness of the allocation: in expectation,

[16] See also (Konow, Saijo and Akai, 2008) for evidence on Japan and the U.S.

[17] The share of Norwegians choosing to equalize in the luck condition is higher at 78%.

even if not in practice, the allocation is equal. Because all individuals in the group get a "fair shot" and redistributing away from the winners would mean introducing an unfair outcome in a fair allocation process. According to this logic, compensating the losers in the lottery requires unfairly punishing the winners in an equal race. This experiment points to possible cultural differences in how individuals apply the proportionality norm and research is required to better understand why such differences exist and with what consequences. For the purpose of this book, I will focus on the similarities – in both cases, reliance on the proportionality norm is widespread – and leave the differences to follow-up research.

In Search of Competing Allocation Principles

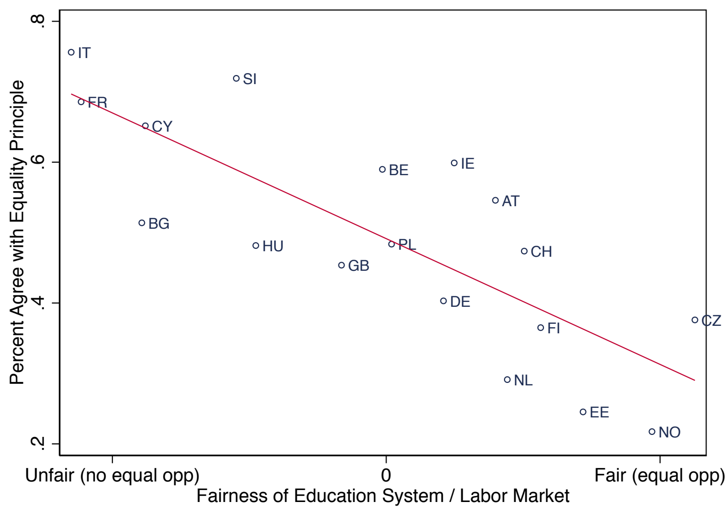
To what extent is focusing on the proportionality norm enough to understand how people come to consent to unequal outcomes among equals. The literature has identified a subset of competing allocation principles: one is efficiency and the other is equality. While the conceptualization of fairness reasoning presented in this chapter does not imply the absence of competing allocation principles, it does elevate the proportionality principle to the exclusive status of a behaviorally binding norm. In support of this assumption, evidence repeatedly shows that proportionality concerns are much more important than efficiency considerations (Almås, Cappelen and Tungodden, 2019; Durante, Putterman and Van der Weele, 2014). In addition, a closer look at the manifestation of the efficiency norm in public debates indicates that it is, by construct, subordinated to the proportionality norm. Indeed, one of the reasons why redistribution risks decreasing the "size of the pie" is that it can demotivate high achievers. The latter reasoning implicitly assumes that those who have a higher income have it because of high productivity. In other words, anyone who explicitly expresses efficiency concerns is implicitly assuming that the status quo is fair as prescribed by the proportionality norm. Economists, in that regard, are not neutral proponents of efficient decentralized modes of coordination. Their work builds on deeply held beliefs about the latter's fairness.

The case of the equality norm is less clear cut. Indeed, some of the previously mentioned results by Almås, Cappelen and Tungodden (2019) suggest its possible existence: the final distribution in the Norwegian sample was more equal because, even on the merit condition, a higher share of Norwegians chose the equal split (3-

3). One possible interpretation is that participants' behaviors are best explained by assuming a mix of two norms, the proportionality norm (rewards are proportional to effort) and the equality norm (if any difference, then equalize), with Norwegians putting more weight on the latter than Americans. Yet neuroimaging data from a follow-up study by the same team suggests that the proportionality norm remains the one in the driver seat. Cappelen et al. (2017) show that while deviations from a proportional income distribution generate strong reactions as measured by brain activity, deviations from an equal income distribution do not. The authors conclude that "concerns for outcome equality is of relatively little importance in situations in which income has been earned through work effort." They emphasize that these results are "particularly striking" since respondents are from "a Scandinavian country that is among the most egalitarian countries in the world."

More generally, even if some individuals seek to follow the equality principle, they are likely to be a small minority, undermining the equality principle's ability to manufacture consent. In 1991, the International Social Justice Project asked respondents in a small number of Western and Eastern European countries their attitudes toward the proportionality and equality principles. In all countries, around 90% of respondents agreed with the following statement, "(p)eople who work hard deserve to earn more than those who do not." Relatedly, about 80% agreed that "(i)t is fair if people have more money or wealth, but only if there are equal opportunities." In contrast, less than 20% on average agreed with the claim "(t)he fairest way of distributing wealth and income would be to give everyone equal shares." The 2018 wave of the ESS also included an item asking about fairness and equality. Respondents were asked whether they agree with the following statement, "(a) society is fair when income and wealth are equally distributed among all people." In this case, close to half of respondents in the survey agree, with a high of 72% in Slovenia and a low of 24% in Estonia. Yet as Figure 2.3 illustrates countries where agreement is high are also countries where a high share of the population also believes that the education system and the job market are unfair, as defined by the proportionality norm. It is thus very likely that respondents who agree with this claim are not expressing support for a competing norm but merely expressing their belief that, given that income differences generates by the market economy are unfair according to the proportionality norm, the only fair outcome, also according

Figure 2.3: Agreement with Equality Norms Correlates with Proportionality Beliefs



X-axis: Mean of answers to two items (Cronbach's alpha: 0.77). "Overall, everyone in [country] has a fair chance of achieving the level of education they seek." / "Overall, everyone in [country] has a fair chance of getting the jobs they seek."
Y-axis: % respondents who agree that a fair society implies equal distribution of wealth and income.
Data: ESS 2018, weighted.

to the proportionality norm, is an equal distribution of market income.

The evidence reviewed in this section examines how individuals behave in situations where material rewards are unequally distributed. Taken jointly, results show that the proportionality norm is widely agreed upon by all, behaviorally consequential and faces limited competition from alternative allocation principles.

Unfair allocations are not limited to inequality-among-equals situations in which outcomes are unrelated to individual contributions. Another example is a situation in which social solidarity, i.e. the pooling of resources to help individuals who can no longer provide for themselves, is plagued by free riding. Free riders are violating the reciprocity norm: the principle according to which pro-social behavior should be reciprocated in kind. In the next section, I review the evidence in support of the reciprocity norm as a universally shared and behaviorally relevant norm of fairness that helps manufacture consent, specifically the consensual provision of generous and redistributive social insurance. I examine whether all individuals appear to share the *same* understanding of the reciprocity norm and whether individuals act to enforce a fair outcome as defined by this norm. I also show that, in the case of redistributive politics, the reciprocity norm faces limited competition from alternative norms of fairness.

What Constitutes Fair Resource Sharing? The Reciprocity Norm

Numerous studies have documented the importance of the reciprocity norm when people are engaged in joint cooperative endeavors (Axelrod, 1980; Ostrom and Walker, 2003). This norm is both simple to describe and surprisingly difficult to theorize. Simply stated, the norm turns people into conditional cooperators. People willingly contribute to a collective endeavor if they feel others are not free riding (positive reciprocity). They punish free riders by either ceasing to cooperate or by excluding them from accessing the goods generated by cooperation (negative reciprocity). Behavior attached to the reciprocity norm is thus inherently two-faceted and can be presented in one of two lights. The more positive light casts it as a form of conditional altruism: people's default position is to help others unless others are "antisocial" (Henrich et al., 2001; Fong, Bowles and Gintis, 2006). Viewed in a negative light, it is a form of conditional punishment: people's default position is to deny help to others unless they are prosocial.

Researchers have argued that the reciprocity norm is a powerful cooperation-inducing social technology: it helps solve the previously mentioned social solidarity problem by turning all group members into willing cooperators, despite the incentive to free ride (Berg, Dickhaut and McCabe, 1995; Falk, Fehr and Fischbacher, 2003). To unpack the relationship between the reciprocity norm and this cooperative equilibrium, behavioral economists rely on an ideal-typical game called the public goods game (PGG) (Fehr and Gächter, 2000; Fischbacher, Gächter and Fehr, 2001; Ostrom and Walker, 2003; Bechtel and Scheve, 2014). In this setup, participants independently (and privately) choose how many of their private tokens to put into a public pot. The collectively pooled tokens are multiplied by a fixed factor and then divided among players. Each subject gets to keep the tokens they do not contribute on top of their cut of the common pot. The multiplying factor is chosen to create a tension between collective interest and self-interest. On the one hand, the group's total payoff is maximized when everyone contributes all of their tokens to the public pot. On the other hand, each player could walk away contributing nothing (keeping their tokens) yet still receive their share of the collective pot. Ultimately, each player faces the same dilemma: contributing more tokens only makes sense if others are also contributing, but the more others contribute, the more it makes sense to contribute zero tokens and "free ride" on others' contributions.

Results from studies with repeated iterations of the PGG show that, left to their own devices, individuals start by contributing a share of their tokens, but ultimately end up contributing nothing. Detailed follow-up studies suggest the following dynamic: a significant share of players start with optimistic priors about what others will do (i.e. contribute) and consequently contribute tokens. Yet, after one or several rounds, having observed that not all players contribute and/or many players contribute but only small amounts, players update their priors in a more pessimistic direction. Over multiple iterations, the final result is that nobody contributes to the common pot.[18] What the PGG captures is the group's joint failure to solve a social dilemma. Everyone would be better off cooperating, but *failure to develop the shared understanding that all will cooperate* ultimately means that, in line with the tit-for-tat logic of the reciprocity norm, nobody does.

A striking finding coming from this line of work is that under specific conditions, the exact opposite outcome occurs and the group converges to full cooperation, with everyone donating all of their tokens. These conditions include information on prior contributions, the ability to communicate and, most importantly, the ability to punish beyond simply refusing to cooperate. In most designs, the option to punish implies taking tokens away from someone who has not behaved in a reciprocal fashion, i.e. someone who has contributed less than others. In some studies, this punishment also comes at a personal cost, with individual players having to give up some of their own tokens to have the option to punish one of the players. With punishment, cooperation is much more likely to emerge. The emergence of cooperation happens through a four step process. First, cooperation is jump-started by a group of "altruistic" individuals willing to take the risk of assuming that others will cooperate. Second, the introduction of punishment limits the share of individuals

[18] Interestingly, evidence shows that the mismatch between expectations and actual contributions is due to actors hedging their bets: they would be willing to contribute large sums but, absent certainty that others will contribute the same amount, they ultimately decrease their exposure to loss by contributing a smaller amount. This "play-it-safe" strategy is what ultimately undermines the whole collective endeavor with each actor ending up seeming less cooperative than they actually are (Fischbacher and Gachter, 2010).

who decide to free ride in the first place and increases the share of individuals who believe that others will cooperate. Third, with punishment, a subset of individuals (which may or may not include the "altruistic" optimists in round one) pays the price of punishing people who free ride, forcing this latter group to change their behavior. Fourth, after punishment is observed, it leads more to update their priors about the relative share of cooperators and free riders. Core to this dynamic is the existence of individuals willing to punish even if at their own expense, resulting in the shared expectations that free riding will not go unpunished (this is why many fewer people free ride once punishment is introduced).

Jointly, these results and others (see Ostrom and Walker (2003) for an overview) highlight the existence of a norm, particularly relevant to situations of mutual help and interdependence, that makes people react negatively to free riding and positively to prosocial behavior, and to expect others to do the same. As third party judges seeking to enforce this norm, people will behave in ways that punish free riders and reward prosocial individuals.

To the extent that social insurance can be characterized as mutual assistance and resource pooling on an unprecedented scale, one can expect the reciprocity norm to be on people's minds when reasoning about social insurance. The best evidence comes from the literature on welfare and deservingness which documents a baseline willingness to help those in need, conditional on evidence that a needy recipient is not a free rider. How do people know someone is a free rider? Assessments are particularly sensitive to what is known about an individual's choice set (constrained or not), agency (is one's behavior a conscious decision or not) and intentions (are they intentionally free riding) (Fehr and Schmidt, 2006; Meier, 2006; Akbaş, Ariely and Yuksel, 2019). Evidence that someone had the option to be self-reliant and did not take it is used to deny help, especially if this was intentional. Jointly, this suggests that people are willing to engage in resource sharing if and only if it does not reward someone trying to "take advantage" of this willingness to help.

The cues most often used to detect free riding is information on job options, work effort and overall labor force attachment (Kootstra, 2016; Sniderman et al., 2014). In most countries with large welfare states, having a job is the best way to avoid being in need. In addition, given that this insurance component of the welfare state often relies heavily on the taxation of labor income (Kato, 2003), not working means both needing help and not contributing to resource sharing.

The reasons for one's unemployed status are consequently up for scrutiny. Jobless but able-bodied individuals —who could in theory be working— raise the most suspicion. For example, Sniderman et al. (2014) show that negative assessment of immigrants in Denmark are tied to stereotypes about a group's time spent working: least deserving are Muslim housewives who are perceived to draw more than they contribute due to their "intentionally" weak labor market attachment.

At first sight, there appears to be an overlap between the reciprocity norm and the proportionality norm: both rely on individual actions observed in the economic realm as inputs X into the fairness function $f(X)$. Specifically, individual effort in the economic realm is used sometimes as a numeraire to judge the amount of resources one should hold relative to another (proportionality norm) and other times as a cue to judge how secure one's access to shared resources is (reciprocity norm). Yet, because of institutional dualism and norm pluralism, the same X can lead to very different fairness judgments. For example, it might be fair, based on the reciprocity principle, to help a hard-working individual who is unemployed for no fault of her own. This does not necessarily imply that it would also be fair to increase her wage when employed. The difference between the two norms is most obvious in the case of first generation immigrants: as hardworking individuals, they are often perceived to be deserving of higher market incomes. Yet, as low-skill outsiders accused of welfare shopping, they can also be undeserving of means-tested social benefits.[19]

As with the proportionality norm, systematic comparative studies documenting the relevant of the reciprocity norms across all post-industrial democracies are unavailable. One exception is a recent set of studies by Michael Bang Petersen and co-authors which, as with the Cappelen et al. study described earlier, experimentally show that the reciprocity norm is important in two most-different cases, namely the United States and Denmark. Petersen et al. (2012) randomly assign representative samples of American and Danish respondents to one of three treatment conditions.

[19] Note however that, in the context of the reciprocity norm, ground boundaries are not fixed. Indeed, free riding behavior in the context of a resource pooling effort exposes one to the dangers of being excluded from the group (or relegated to minimal and residual help). Conversely, it might be fair, based on the reciprocity principle, to include non-members based on evidence they are pro-social cooperators (Kootstra, 2016). This connection between desert, as defined by the reciprocity norm, and group boundaries has been extensively documented by work in sociology on boundary formation (Lamont and Molnar, 2002).

All respondents are presented with a male welfare recipient and then asked, "To what extent do you disagree or agree that the eligibility requirements for social welfare should be tightened for persons like him?" In one treatment, no cues are provided about the recipient's labor market attachment and effort. In another treatment condition, respondents are told that he "never had a regular job" that while "he is fit and healthy" he is not "motivated to get a job." In a third treatment condition, respondents are told that the recipient "always had a regular job" but was affected by a "work-related injury" and is "motivated to get back to work again." Assuming individuals in both countries reason in similar ways based on the reciprocity norm, there should be little to no difference in how respondents treat the deserving recipient relative to the undeserving one. Indeed, as the authors write, "despite decades of exposure to different cultures and welfare institutions, two sentences of information (...) make welfare support across the U.S. and Scandinavian samples substantially and statistically indistinguishable." One implication is that the well known differences between the two countries stem less from differences in willingness to punish free riders in line with reciprocity but differences in the beliefs that free riding is ubiquitous among net-beneficiaries of social insurance. I come back to this issue in the next chapter.

In Search of Competing Allocation Principles

The last claim in need of examination is whether or not the reciprocity norm crowds out other competing allocation principles. In the case of the reciprocity norm, I have identified two such principles. One is need, a principle according to which a fair outcome is one where the neediest get access to shared resources first.[20] Overall, most decisions to allocate resources based on need appear implicitly or explicitly tied to evaluations of the *reasons* for need, i.e. deservingness as defined above (Skitka and Tetlock, 1993). Furthermore, while need might overrule deservingness when deciding to help a *specific* individual, one can reasonably expect need to take a back seat when reasoning at the group level. This does not imply that need plays no role: it most likely explains why, even in the least generous social system, there is always a residual system that enables survival. To the extent that this book is interested in

[20]For example, 75% of ESS (2018) respondents agree that "A society is fair when it takes care of those who are poor and in need regardless of what they give back to society."

inequality and redistribution, my focus is not on the existence of such a residual net, but the extent to which voters are willing to increase its generosity and/or include recipients into the more generous social insurance programs that cover the majority of the population. This is when the reciprocity norm and, as a result, beliefs about the prevalence of free riding matter the most.

The second candidate as a competing norm is parochial altruism. According to this principle, a fair outcome is one where only group members get benefits, while non-members are excluded. Above, I argued that group boundaries and the reciprocity norm are intimately tied to each other. In other words, parochial altruism might be better thought of as one manifestation of the reciprocity norm. A famous study by Martin Gilens supports this interpretation. In his work on Americans' attitudes toward means-tested benefits (a.k.a. "welfare"), Gilens (1999) famously shows that prejudice and racial stereotyping play a key role in explaining why "Americans hate welfare." Americans tend to believe that most welfare recipients are black and that black people lack sufficient commitment to a moral ethic of hard work and diligence. He finds that Americans ultimately refuse to contribute to a social program they believe to be overridden by free riding (see also the recent study by Condon and Wichowsky (2019)). In other words, racial prejudice (i.e. a positive effect limited to members of one's own racial group) and perceptions of deviations from what the reciprocity norm prescribes are deeply intertwined. In a carefully designed vignettes experiment, Fong and Luttmer (2011) find that racial cues do indeed affect Americans' perception of a given recipient as hard-working. In a separate study, Sniderman, Tetlock and Brody (1993) further document the key role of the reciprocity norm and deservingness beliefs. He finds that ideologically conservative Americans are *more* generous toward an hypothetical deserving black recipient than a deserving white recipient. The reasoning appears to be that, given the respondents' prior beliefs about the modal black recipients, any given specific black individual (i.e. the one in the experiment) that does not behave according to the stereotype must be particularly hard-working. As a concept, prejudice alone cannot explain these diverse outcomes. Instead, a model accounting for the ways in which the reciprocity norm both enables and constrains prejudice does a much better job (more on this in Chapter 5).

The evidence reviewed in this section examines how individuals behave when having to cooperate to provide resources to those who cannot provide for themselves while minimizing incentives to free ride (the social solidarity problem). Taken jointly, results show that the reciprocity norm is widely shared by all and behaviorally consequential. In the context of redistributive politics, it crowds out other allocation principles.

Beyond Western Democracies?

How universal are the proportionality and reciprocity norms? There is tentative evidence indicating that the proportionality norm might be specific to Western market-based societies. Indeed, a recent study of children in western and non-western societies found that "while children from a modern Western society distributed the spoils of a joint enterprise precisely in proportion to productivity, children from a gerontocratic pastoralist society in Africa did not take merit into account at all." The authors go on to conclude that "the results suggest that some basic notions of distributive justice," such as the proportionality norm, "are not universal intuitions of the human species but rather culturally constructed behavioral norms." More intuitively, the overlap between the proportionality norm and market ideology is so extensive that one need not probe much to hypothesize that the proportionality norm is the moral DNA of Western market economies.[21]

An emerging consensus among social scientists is that the reciprocity norm is itself rooted in a more fundamental tit-for-tat behavior deeply ingrained in the human psyche (Axelrod and Dion, 1988). This line of research has identified the proximate psychological mechanisms that make such a tit-for-tat dynamic possible. Among these mechanisms are the capacity to grasp interdependence and reason as a collective "we" (Ostrom, 1998; Tomasello and Vaish, 2013). This fundamental form of sociotropic reasoning is required if individuals are to develop an intuitive grasp of the collective dilemma they face as a group (Gintis, 2016*a*; Baumard, 2016). If each constitute elements of the collective free rides, then the collective cannot survive. This intuitive understanding of the "we" is central to peoples' immediate grasp of a social dilemma. It provides the basis for prosocial behaviors such as the famous "sense of duty" parameter seeking to explain, for example, why people vote despite there being no direct benefits to the self. An abundant literature on trust (see Ostrom and Walker (2003) for a review) also finds that people have an

[21] Extending some of the studies to China seems like a fruitful avenue for future research.

intuitive understanding of moral hazard and are attentive to cues signaling whether or not one is being taken advantage of. Finally, Delton et al. (2012) and others have documented the emotional underpinning of reciprocity, i.e. the emotional outrage felt when witnessing undeserving free riders get benefits they do not "deserve" and take advantage of well-meaning cooperators. Even assuming that the basic structure of the reciprocity norm is common to most cultures, its exact embodiment is likely to be culture-specific. In other words, perceptions of "who is carrying their (fair) weight and who isn't" will follow culture-specific cues, suggesting some amount of variation also within Western democracies (e.g. more racialized cues in the U.S. than in Europe). In this book, I am interested in countries in which redistributive politics are interpreted through the reciprocity lens. This implies the existence of an expansive and relatively generous welfare state. In other words, while evidence that some version of the reciprocity norm existing in most societies, the particular version discussed in this book is likely limited to countries with mature welfare states.

Chapter 2: Summary and Next Steps

Table 2.1 list the core claims made in this chapter regarding the nature of fairness reasoning and its implications for redistributive preferences. In support of claims 1 through 3.2, I have reviewed experimental evidence documenting "the contours" of the proportionality and reciprocity norms and their role in manufacturing consent in two types of situations: 1) situations in which some have more 'earned' income than others, and 2) situations in which some benefit from social cooperative resource pooling more than others. In the next chapter, I move from the controlled conditions of a lab or survey experiment to the messy world of redistributive politics. Specifically, I use survey data to examine claims 4 through 6 and their implications for how to understand the structure of mass attitudes toward redistributive social policies.

Table 2.1: Unpacking Fairness Reasoning

1	In Western societies, redistributive social policies evoke two fundamental allocation problems: the *inequality-among-equals* problem and the *social solidarity* (or mutual help) problem. Fairness reasoning – i.e. the desire to do the fair thing as prescribed by shared norms of fairness – contributes to solving these allocation problems.
2	These problems are “solved” when enough individuals believe that the status quo is fair. Specifically, they believe that differences in income are fair according to the proportionality norm (*inequality-among-equals* problem) and contribution/reliance on social insurance is fair according to the reciprocity norm (*social solidarity* problem).
3.1	The proportionality norm states that individual material rewards should be proportional to individual merit, defined as a combination of individual effort and features equally accessible to all (e.g. talent, thanks to the genetic lottery, or a degree, assuming a “meritocratic” education system).
3.2	The reciprocity norm states that individuals should behave prosocially (i.e. cooperate, share and not free ride) if others are behaving in a similar way.
4	Within Western democracies, agreement with – and reliance on – the proportionality norm and reciprocity norm are quasi-universal. Instead, people differ on their beliefs about the prevalence of norm-violating outcomes and behaviors.
5	Attitudes toward redistributive social policy preferences are shaped by the desire to do what is fair. Consequently, fairness beliefs provide individuals with a proto-ideology through which to interpret the world and pick fairness-maximizing policies. Policy preferences will vary in predictable ways with fairness beliefs.
6	To understand the relationship between policy preferences and fairness beliefs, we need to examine the extent to which a policy moves the status quo closer to, or further from, what fairness norms prescribe. Policies that have no implications for fairness will not trigger fairness reasoning.

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