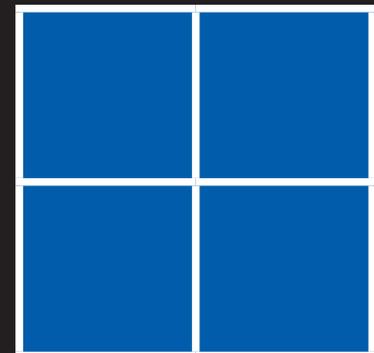


Perceptions of Inequalities: implications for social cohesion

Christine Han, Jan Germen Janmaat, Bryony Hoskins
and Andy Green

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| Contents | Page |
|--|-------------|
| Abstract | 3 |
| Introduction | 4 |
| Section One: Perceptions of Inequalities: Concepts and Terms | 11 |
| Equality and Inequality | 11 |
| Perceptions of Inequality | 14 |
| Perception of Inequality: Related Terms | 15 |
| Section Two: Perceptions of Inequalities | 20 |
| Explanatory Theories | 20 |
| Biosocial Theories | 21 |
| Psychological theories and explanations | 22 |
| (i) Individual characteristics, and personal values, attitudes, and standards | 22 |
| (ii) The individual's decision making process | 25 |
| (iii) Individual psychological reactions to situations | 25 |
| a. Changing one's inputs or outcomes | 25 |
| b. Making psychological adjustments | 26 |
| c. Individual attitudes | 28 |
| Social and political theories | 28 |
| (i) Social norms | 28 |
| (ii) Myths and ideologies | 31 |
| (iii) Meritocracy, and opportunities for advancement | 32 |
| (iv) Social circumstances | 32 |
| (v) Meso-level factors | 33 |
| Section Three: Societal Determinants of the Cognitive Elements of Inequality | 34 |
| A Framework Mapping Existing Research | 35 |
| Perspectives on Cross-National Differences in Views on Inequality | 37 |
| Findings | 40 |
| (i) East-West European studies | 40 |
| (ii) Cultural and regime studies | 44 |
| (iii) Micro-macro studies | 47 |
| Discussion | 49 |
| Section Four: The Effect of the Cognitive Elements of Inequality on Important Social Outcomes | 54 |
| Section Five: Conclusion – Omissions in the Literature | 57 |
| References | 61 |

Figures

| | | |
|---|---|----|
| 1 | Factors influencing, and influenced by, perceptions of inequality | 18 |
| 2 | A framework for classifying comparative studies on views on inequality | 19 |
| 3 | A framework for classifying comparative studies on views on inequality (with selected studies) | 36 |

Abstract

There has been much research on different forms of inequality and their effects on social cohesion. Few studies, however, have explored the psychological and social mechanisms linking inequality to social cohesion and other macro-social outcomes. How do individuals perceive and experience inequalities, and how do these perceptions relate to civic participation, tolerance, trust and other outcomes relevant for social cohesion? The Perceptions of Inequalities project – of which this literature review paper forms an essential part - focuses on inequalities as perceived and understood by young people.

In the first section of the paper, we clarify the main concepts and terms used in the study of perceptions of inequalities project, and examine the different types of theories explaining differences in perceptions, values, and judgements relating to inequality, as well as how individuals respond to these. The second section of the paper takes a cognitive and social psychological approach to understand how people perceive inequalities.

The third section of the paper reviews international comparative studies in order to assess the influence of societal level conditions on the cognitive elements of inequality (viz. perceptions, values, and judgements of inequality). We take a comparative perspective, and examine perceptions of inequalities within a comparative and ‘macro’ context. In the fourth section, we examine the studies that investigate the social effects of the cognitive elements of inequality.

In the fifth and final section, we identify the omissions in the literature, and explain how the Perceptions of Inequalities project seeks to address these omissions.

Introduction

Levels of inequality, and the issues arising from these, have been the subject of much research, particularly from the perspective of social justice (e.g. Alesina and Glaeser 2004, Dorling 2010). At the same time, research in the field of social science has produced substantial evidence of links between inequality and social outcomes (Mueller 1997, Uslaner 2002, Esping-Andersen 2005). This link is one of the main themes being studied at the Centre for Learning and Life Chances in Knowledge Economies and Societies (LLAKES). Work carried out by Wilkinson and Pickett (2010), for instance, shows that higher levels of income inequality are associated with lower levels of public health and general well-being, and also with lower levels of social cohesion; at the same time, more income-equal societies tend to have higher levels of social and political trust, and lower levels of violent crime. Educational equality has also been linked with higher levels of social cohesion across a number of measures (Green *et al* 2006). This research paper takes a comparative perspective, and focuses on the relationship between national factors and social cohesion. It also examines how inequalities affect individual attitudes and behaviours in ways which lead to different societal outcomes. Our approach therefore is untypical of current British sociological research in education in that it does not address major themes such as habitus, performativity, and intersectionality. Rather, we tackle perceptions of inequalities within a comparative and ‘macro’ context, and aim to review the research evidence as to how individual perceptions are influenced by, and influence, the macro-context.

The research at the Centre for Learning and Life Chances in Knowledge Economies and Societies (LLAKES) on Perceptions of Inequalities was designed with this in mind. Data was gathered from five countries (Denmark, France, Germany, Singapore, and the UK) through questionnaire surveys and interviews with students at 14 and 16/17 years in schools, and at various ages in higher education. These data will be analysed in a future report. This background paper reviews the international literature on how inequalities are perceived, and how these perceptions shape various social attitudes.

Before we highlight the importance of the perceptions of inequalities, we need to understand the origin of actual inequalities. The kinds of inequalities experienced by young people begin at home. Bourdieu (1985) famously wrote about how social class, and the cultural capital associated with this, explained the different levels of academic achievement by children from

different social classes, and how cultural capital, and the advantages or disadvantages related to this, was transmitted within the family. These inequalities are carried through to educational achievement when children reach school going age. There is an established literature on the effects of educational inequality on social inequality. In their study of working class children, Jackson and Marsden (1986) described how family background – which Bourdieu encapsulated in his notion of cultural capital – influenced children’s educational choices and achievement. Their work demonstrated how the education system was not genuinely meritocratic because it essentially promoted a middle class culture and, in so doing, placed working class children at a disadvantage. Subsequent research has produced more nuanced analyses of the factors affecting educational experience. In his case study of a comprehensive school, Ball (1981) showed how school practices influenced the educational experiences of young people, to the extent of undermining the structural reforms aimed at redressing inequality. The practice of banding carried out by teachers, for instance, resulted in different intellectual environments, which led to different curriculum and examination options for the children.

Beyond the effect of inequalities, such as different levels of cultural capital, on *individual* educational attainment and outcomes, there is an association between inequalities and *social* outcomes. The strongest evidence of this comes from cross-national studies of the effects of income inequality. Wilkinson (1996) has shown that, for countries above subsistence levels of per capita income, there is a strong negative correlation between levels of household income inequality, as measured by the Gini coefficient, and levels of public health. In fact, income inequality explains much more of the variation between countries on most measures of public health than average levels of income. Wilkinson and Pickett (2010) have also demonstrated a significant negative correlation across countries between income inequality and other social outcomes such as trust, mental health and general well-being. Uslaner’s research (2002, 2003) suggests that social trust is strongly associated at the individual level with basic personality traits, such as optimism, which may be acquired in early childhood; but he also confirms that income inequality has a powerful impact on trust at the societal level. These analyses are based solely on cross-sectional data, and therefore cannot show beyond doubt that the relationships between income inequality and social outcomes are causal and, if they are, which way the causality runs, or what the role of the individual is. Nevertheless the accumulated evidence they provide of a relationship is highly consistent, and quite powerful.

Less research has been done on the relationship between educational equality and social cohesion at least in terms of individual level studies, but what there is suggests that the two are often associated, at least for adults. Evidence of the effects of educational inequalities on social attitudes amongst school students is somewhat hard to find and interpret. Duthilleul and Ritzen (2002) found a relationship across countries between the distribution of literacy scores for 15 year olds in the 2000 Programme for International Student Assessment (PISA) study and measures of adult social trust, but there seems to be no logical explanation as to why educational inequalities amongst one youth cohort should be related synchronically to social attitudes amongst the adult population in general. As we discuss later in this report, analysis of the 1999 International Association for the Evaluation of Educational Achievement (IEA) Civic Education Study data shows no significant relationship across countries between the distribution of civic knowledge and skills amongst 14 year olds and their levels of social trust. However, we should probably not expect to find a relationship here. Fourteen year olds' perceptions of educational inequality are mostly based on their experiences in their own schools where educational inequalities may not be representative of inequalities across the school system as a whole. Indeed, in countries with selective secondary education systems, which tend to have high levels of educational inequality amongst fifteen year olds nationwide, inequalities within schools may be relatively low because intakes are more homogeneous (Green 2008, Mostafa 2009). If there is an effect of inequality on the social attitudes of school students, it is more likely to be through students' perceptions of social inequalities, which are generally quite visible outside the school, than through their perceptions of educational inequalities, which may be obscured in the environment of the particular schools which they attend.

The strongest evidence of the effects of educational equality on social outcomes derives from cross-national analysis of the relationship between adult skills, qualifications, and social outcomes. Using cross-sectional international data from the 1990s on adult literacy skills (from the International Adult Literacy Survey), household income inequality (from the World Bank), and social attitudes and behaviours (from World Values Survey and Interpol), Green *et al* (2006) found a strong positive correlation between skills inequality and income inequality, and a negative correlation between skills inequality and various measures of social cohesion. Using a composite indicator for social cohesion (which aggregated measures for social trust, civic cooperation and violent crime), and after controlling for the effects of income inequality, the analysis showed independent effects of educational inequality on

social cohesion. Time series data on directly measured adult skills are not available, but there are over-time international data on highest levels of education, from which an 'education Gini' can be computed. Making use of this data and time series data from the World Values Survey, Green *et al* (2006) also analysed the relationship between education inequality and social cohesion over time, and found no significant correlation between education inequality and social trust. However, after controlling for income inequality, educational inequality was shown to have a strong impact on various other measures of social cohesion. Educational inequality was positively correlated with violent crime and political unrest, and negatively correlated with political liberties and civil liberties (Green *et al* 2006), the latter of which are salient characteristics of models of active democratic citizenship (see Hoskins and Mascherini 2009).

Overall then, we can say that cross-national statistical analysis provides quite strong evidence of social and educational inequalities impacting on adult attitudes and behaviours. However, as Green *et al* concluded in their study on *Education, Equality and Social Cohesion* (2006), we cannot know if there is a causal relationship and how it might work unless we can understand more about the mediating relationships. There are various theories as to what these mechanisms might be.

Wilkinson has argued (2005) in the public health context that the main mediating factor may be stress. Income inequality tends to increase the level of high-stakes competition in society. This in turn is likely to generate more stress and anxiety, characteristics which are known to be related to a host of physical and mental health disorders. By the same token, social inequality may be prejudicial to social trust and other aspects of social cohesion. Large inequalities may cause increased conflict over access to incomes and other resources. At the same time, as Uslaner (2003) argues, inequality may increase the social distance between individuals and groups, and thus make the trusting of others more difficult. Educational inequality may have similar effects through similar routes. It may affect social cohesion both indirectly, through its effects on income equality, or directly, independently of income distribution. In both cases, the mechanisms may be similar. Large gaps in educational levels in society, even where unrelated to income, create status divisions which are also likely to be the source of stress and anxiety, and generate more social distance between people (Green *et al* 2006). This in turn may reduce trust and cooperation.

Thus how people experience and perceive inequalities is potentially one of the crucial mechanisms linking actual inequality to a range of social outcomes. This research paper explores the international literature on perceptions of inequalities, and their effects on social attitudes and behaviours. The literature comes from social psychologists, sociologists, and political scientists in the main, although economists have also made contributions, not least in the profusion of recent work within the field of well-being and happiness. The review is skewed towards perceptions of social inequality because there is considerably more research on this than on perceptions of educational inequality. There is also a strong bias towards the perceptions and attitudes of adults rather than children and teenagers. This again reflects the unevenness in the literature. We hope to contribute towards correction of the latter through forthcoming reports on our own fieldwork with young people.

This is not to say that existing studies have not examined the experiences and perceptions of youngsters at all. There is a distinct body of literature employing its own terminology to assess how perceptions are formed and what their impact is. Brown (1987), for instance, used the concept of ‘frames of references’ to describe the complex interplay between young people’s cultural resources, and their identity. He described how young people filtered their cultural resources and the career options through the lens of the relevance of these to their personal identity as well as their ‘way of being in the world’ (p. 116). In other words, working class children were not merely passive recipients of cultural capital; rather, they had views as to the how they saw themselves and their lives, and they selected from their cultural resources, and acted accordingly with respect to their approach to schooling.

Research in this tradition has mostly been case study based, and has generally focused on a single country. Cross-national quantitative studies in this tradition are so far lacking. Our project will address this omission.

Perceptions of inequalities are important for a number of reasons. First, in situations where individuals perceive that inequalities exist in their society, such awareness may affect their attitudes and behaviour. How this occurs is complex, and is influenced by a multitude of factors. There is nothing inevitable about how individuals perceive social relations. There is a long standing discussion within Marxist thought, for instance, about how people’s political conceptions are affected by exploitation and inequality. While some scholars believe that workers would normally rise up and contest the inequality and exploitation they experienced,

Marx (1974) was quite clear in his analyses in *Capital* that this would not occur automatically. Marx's theory of 'commodity fetishism' in the wage relation argued that the true nature of exploitation at work was obscured by the apparently 'natural' nature of market relations between employer and employee in a system of 'free' wage labour. It would take a new political consciousness (which might have to be imported from outside the workplace) for workers to understand the true nature of exploitation in the capitalist system.

At the same time, culture and ideology, which differ across time and place, also affect how individuals perceive inequalities. More recently, Osberg and Smeeding (2006) found that people generally tended to underestimate the magnitude of real inequalities, and that there are substantial differences between Western countries in the degree of underestimation. Moreover, nations also differ in their understanding of what a fair income distribution looks like, in that some accept much larger income differences than others (Kelley and Evans, 1993). Consequently, the most unequal societies may not have the highest rates of public indignation about such inequalities. Nonetheless, regardless of whether perceptions of inequalities accurately reflect reality, such perceptions are likely to affect a person's attitudes and behaviour.

A second reason perceptions of inequalities are important, is that it is theoretically possible to assume that these are strongly related to social cohesion outcomes such as civic and political participation. If people consider that there are social problems that need to be addressed, e.g. inequalities that they judge to be unfair, they are more likely than not to engage in civic or political action in an effort to change the situation for the better (Haste 2004, Meyer 2007).

At the same time, perceptions of inequalities are relevant to the political process as these influence voting behaviour. If politicians are confronted with widespread dissatisfaction about inequalities, they have an incentive to act on the matter (Luebker, 2004). Depending on the country context, and the extent to which public opinion is more important than politicians' own conviction as a force motivating them to take action, perceptions of and views on inequality can be more politically relevant than actual inequalities.

A third reason for the importance of perceptions of inequalities is to do with their social effects. Research on perceptions of inequalities has devoted very little attention to this subject. In particular, comparative research investigating cross-national differences in the

links between perceptions of inequalities and social outcomes is practically non-existent. On the one hand, there is no direct connection between actual inequalities and perceptions of inequalities; on the other hand, it may be expected that there are links between perceptions of inequalities and social outcomes (as we will demonstrate later in this research paper). Given this, there is an urgent need to address this omission.

The current research paper is part of a project which specifically focuses on inequalities as perceived and understood by young people. The term ‘inequalities’ is used to capture the different forms of inequalities, e.g. educational inequality, social inequality, income inequality, gender inequality, etc. As this paper will show, the different forms of inequalities – and the ways in which these are perceived – have different social and other outcomes.

Data was gathered for this project among students of various ages in five countries (see Appendix for a detailed description). The project investigates the following questions:

- (1) How are perceptions, values, and judgements of inequalities formed, and what factors can explain their variation?
- (2) How do the perceptions of inequalities interact with values and judgements about inequalities? What is the relationship between the three?
- (3) How does the objective level of inequalities affect how people think about inequalities? Does this vary according to different contexts - socio-political, cultural, educational system, and personal experience?
- (4) How are perceptions, values, and judgements about inequalities related to active citizenship, and other elements of social cohesion?

By way of introducing the project, the current research paper engages in a review of the literature relating to perceived inequalities. It aims to:

- clarify the main concepts used in the study;
- provide an account of the theories that have been put forward to explain, not only why and how individuals perceive inequalities, but also their attitudes towards and manner of coping with such perceptions;
- review the research on the factors influencing the formation of people’s ideas about inequality, covering micro-, meso- and macro-level factors, and paying particular

attention to how income inequality, as a distinct macro-level factor, is related to people's perceptions and views of inequality;

- review the research on the effect of perceived inequalities on social outcomes such as social cohesion and active citizenship;
- analyse how these theories relate to the literature on consciousness raising and political change; and
- identify key omissions and shortcomings in the existing literature.

Section One: Perceptions of Inequality: Concepts and Terms

This section aims to clarify the main concepts that will be used in the study.

Equality and Inequality

Before dealing with *inequality*, we need first to understand what equality is. Turner (1986, 34-35) identifies four types of equality:

The first is ontological equality or the fundamental equality of persons. Secondly, there is equality of opportunity to achieve desirable ends. Thirdly there is equality of condition where there is an attempt to make the conditions of life equal for relevant social groups. Fourthly there is equality of outcome or equality of result.

Ontological equality is the view that all persons are of equal moral worth, and are therefore deserving of the same respect and dignity. This is usually politically expressed in democracies in the form of equal and universal suffrage. This ontological equality is taken as a given in the societies we are analysing in that the principle that every person is of equal moral worth is not in dispute. Rather, the issue is more one of whether there is equality of opportunity or condition, and this is to do with to do with social justice.

Over the course of several centuries, different rights have developed in Western societies to form the supporting structure for equality of opportunity and condition. T.H. Marshall traced the development of these from civil rights, to political rights and, finally social rights (Marshall and Bottomore 1992). The first of these comprised rights relating to individual freedom, viz. 'liberty of the person, freedom of speech, thought and faith, the right to own property and to conclude valid contracts, and the right to justice' (p. 8). The second

concerned the rights associated with the exercise of political power, e.g. as a voter. However, Marshall's particular insight was that civil and political rights were insufficient to enable individuals either to exercise those rights, or to improve their lot in life. For this they needed social rights – 'the whole range from the right to a modicum of economic welfare and security to the right to share to the full in the social heritage and to live the life of a civilised being according to the standards prevailing in the society' (p. 8). Several decades earlier, Anatole France had famously critiqued the paucity of equality in the law: 'The law, in its majestic equality, forbids the rich as well as the poor to sleep under bridges, to beg in the streets, and to steal bread' (France 2007, 95). In other words, equality before the law did not ensure equality with respect to the burden of the law nor, one could add, equality of opportunity or condition. Marshall himself identified the education system and social services as the social rights that form the bedrock for civil and political rights, and his arguments subsequently formed the basis of the welfare state in the UK. At the same time, the ensuring of such social rights went some way to protecting the civil and political rights of individuals.

In recent years, there has also been a greater awareness of the diversity found in many societies, a diversity that arises from differences in culture, ethnicity, gender differences, etc, and of the injustice that arises out of the failure to treat these differences as being of equal worth or respect. Scholars such as Nancy Fraser (1996, Fraser and Honneth 2003) have therefore argued for the need to 'recognise', or give equal respect, to the distinctive perspectives of minority groups. Fraser herself has gone further and taken the position that genuine recognition requires redistribution of resources that will go some way towards ameliorating injustices that arise from a society privileging the dominant group or perspective (Fraser 1996).

When we talk about inequalities in this study, we refer mainly to the differences in outcome for individuals in education and in society; hence our focus on these factors in our review of empirical research later in this paper. Inequalities of outcome – which may occur as a result of differences in individual endowments, or in the way people are treated by institutions and other individuals - are usually measured in terms of inequality in wages, household income, and wealth. Indeed, the term 'social inclusion' was originally developed by French philosophers to capture other forms of equality or inequality derived from these. While we acknowledge that there are individual differences in personality, ability, etc. which may be unrelated to social conditions, we focus in this literature review on inequalities relating to

ethnicity, social class, and educational experience etc. as perceived by individuals, as well as specific experiences that have been studied and overtly linked to perceptions of inequality.

Different forms of inequalities often mutually reinforce each other. For example, income differences are usually linked to a number of factors, including social class, ethnicity, gender, wealth, and the rural-urban divide. But, as we shall see, the fact that there are differences in outcome may not in and of itself be considered undesirable or intolerable by people in a society. Faced with differences in outcome, individuals look at other factors to determine whether such differences are morally acceptable. Among other things, they look at whether the differences in outcomes are based on differences in factors they consider relevant. Given a situation where there are differences in remuneration, individuals may consider whether there are differences in the ability or effort required in, or the responsibilities of, the job in question. The factors that are considered relevant may differ from society to society. There are societies which consider that workers should be remunerated on the basis of ability and responsibility, while others do so on the basis of seniority. Hence, what is regarded as being an acceptable relevant factor is socially constituted. However, the principle remains the same, viz. that differences in outcome will be tolerated by most people if these are based on a socially accepted factor relevant to the outcome.

In situations where there are differences in outcome, individuals may also take into consideration the opportunities for mobility. In other words, they may tolerate inequality of outcome if they believe there is a degree of equality of condition or opportunity. As we shall see in Section Three, this is the basis of the ‘American dream’ thesis that is used to explain the willingness of people in America to tolerate a high level of social inequality.

Hence, inequality of outcome may not – in itself – be something individuals consider undesirable or intolerable. Whether they are willing to tolerate this depends on whether they think the outcomes in particular, and conditions in general, are just. In other words, inequality of outcomes is considered a social ill, and will not be tolerated, only if it is not linked to factors that render it just.

Perceptions of Inequality

It is important to note, however, that we are not using ‘perception’ in the way cognitive psychologists do. When they refer to ‘perception’, what they mean is a complex construct involving ‘the set of processes by which we recognize, organize, and make sense of the sensations we receive from environmental stimuli’ (Sternberg 1999, 110). In other words, what they study is the form of perception that involves the senses, and the process by which we make sense of the signals involving our senses.

It is in the area of social psychology that we find ‘the science of human thought, feeling and behaviour as they are influenced by and have influence on other people’ (Hogg and Vaughan 2002, 41). Hogg and Vaughan distinguish between thought and cognition in the following way:

Thought is very much the internal language and symbols we use. It is often conscious, or at least something we are or could be aware of. In contrast, cognition is largely automatic. We are unaware of it and only with difficulty notice it, let alone characterise it in language or shared symbols. Perhaps a useful way to think about cognition is as a computer program: it operates in the background to run all the functions of the computer that we are aware of ... (Hogg and Vaughan 2002, 41).

It was certainly the case that the students we interviewed on issues of inequality sometimes responded instantaneously and seemingly spontaneously while, at other times, they had to pause to think before they replied. Whatever the case may be, in both cases – i.e. whether the students were engaging in thought or cognition – psychologists would say that they engaged in some kind of mental activity.

Hogg and Vaughan describe both thought and cognition as ‘mental activities that mediate between the world out there and what people subsequently do’ (2002, 41). In other words, these mental activities contribute to how the individual understands the world, and how they act in response to this understanding.

Social psychologists think of perception in terms of the ‘impression’ or ‘construal’ of people, events or circumstances by an individual or a group.

For Robinson (1983, 345):

Perceptions of inequality refer to people's impressions of the nature and extent of inequality in the opportunities available to particular social groups, in the treatment accorded them by other social groups and institutions, and in the conditions of life that they experience.

Where the term 'impression' is used here to refer to an understanding of a person or situation, there are cases, in popular usage, where it also means an opinion of which one is uncertain (as in 'I had the impression that John was able to attend the meeting, but I was wrong'). In writing about social psychological research, which includes the area of person perception, Trope and Gaunt see this field as being about 'how people mentally construe each other's behaviour' (2007, 176). This view of perception as construal is helpful because it points to the fact that the act of perception involves individuals trying to make sense of the meaning or significance of people and situations. As will be seen, this cognitive core is significant when it comes to understanding human perception.

To perceive a situation to be unequal involves the *recognition* or the (tacit) *evaluation* that a situation is unequal. This in turn draws on individual and societal beliefs and values, i.e. what individuals consider to be true or right, or worthwhile or important. The mental construal of a situation is a necessary first step in order for an individual to see the need to redress an injustice, and to act on it.

In our study, we use the term 'perception' – rather than, say, habitus or framing – because 'perception' indicates more clearly the individual's effort to make sense of what she is experiencing.

Perception of Inequality: Related Terms

There are a number of other concepts and terms used in relation to the subject of inequality. Research studies may, in addition to the *perception* of inequality, also focus on the *experience*, *beliefs*, *judgements*, *understandings* or *values* relating to inequality. All these terms contain an affective component, and involve the cognitive process, with the individual making mental efforts to make sense of and evaluate the situations they encounter, and apply social norms. For ease of reference, we will use the term 'cognitive elements' to refer to these terms.

Individuals may *experience* or undergo circumstances or events in their lives that may make them feel they have been unequally treated. Charlesworth (2005) writes about such experiences in terms of ‘imputations of inferiority’ based on interpersonal processes, viz. ‘forms of practical recognition born of shared position that are necessary for people to interact’ (2005, 300). In other words, if a person experiences inequality or inferiority, this is a mental state or condition that she takes on as it were, and does so in a social interaction in which both she and the social group share an understanding that that state or condition is unequal or inferior.

As for *values*, Rokeach defines these as ‘enduring belief(s) that a specific mode of conduct or endstate of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence’ (1973, 5). Hence, *values* are used in this paper to refer to normative ideas about inequality, i.e. ideas about what is important or held in high regard, or what *should be*. In this regard, a value system is ‘an enduring organization of beliefs concerning desirable modes of conduct or end-states of existence along a continuum of relative importance’ (Rokeach 1973, 5).

Judgements are understood and used in this paper to be normative evaluations of perceived inequality, i.e. an evaluation of how just or desirable a state of inequality is. People use their values and beliefs to form judgements about inequality. The way they think about inequality – what we would describe as *understandings* in common parlance – may vary from person to person depending on these beliefs and judgements. For Glaser (2005, 17ff), beliefs about inequality rest on prevailing ideological narratives and values. Hence, such beliefs may not necessarily reflect reality, but depend on whether a society tends to the left or right of the political spectrum, and how well indoctrinated the individual is in that ideology. With regard to how individuals understand inequality, Gandy and Baron (1998) similarly note that such understandings are often filtered through the lens of ideology or social affiliations (e.g. membership of ethnic group, or social class). Such understandings may also be influenced by exposure to the mass media, and the way that these may present or ‘frame’ the different social groups.

Hence, people who hold that women are inferior to or different from men (regardless of the source of such beliefs) are likely to believe in the unequal treatment of men and women; as a result, they may not perceive inequality of treatment where this is present or, if they do, judge

it to be justifiable and just. Alternatively, how individuals come to *understand* a situation as being equal or not, and how they judge the degree of inequality, may be influenced by prevailing views in society, or by their membership of certain social groups. At the same time, those who *value* equality and hold it to be ethically significant, may be more attuned to perceiving inequality where this exists, and also to consider it unjustifiable and unjust. In other words, one's beliefs, understandings and values influence one's perception, not only as to whether there is inequality, but also the magnitude of such inequality, and what would be considered just under the circumstances.

In their turn, beliefs, understanding and values may be affected by experiences of unequal treatment. For instance, studies have shown that experience of deprivation and poverty at an impressionable, youthful stage in life is linked to individuals being more risk averse, and more likely to value state redistribution of resources (Alesina and Giuliano, 2009). At the same time, the way people experience the society around them can also make a difference to their outlook. For instance, when disadvantaged individuals in highly unequal societies are means tested for benefits, they tend to feel pessimistic, and also lack a sense of control over their destiny; this pessimism and lack of control is associated with low levels of generalised trust – a diminished sense that people outside their immediate social group can be trusted. In addition, as will be shown, individuals may also make psychological adjustments with respect to their beliefs when faced with perceptions or experience of inequality. The further point can also be made that perceptions and experience of inequality may be closely linked. For instance, a person who believes that there is societal racism towards his own ethnic group, may *experience* that racism personally.

Hence, as visually represented in Figure 1 below, *perceptions* may influence *experience* of inequality which may, in turn, influence *values* and *beliefs* relating to equality; these may in turn influence *perceptions* of inequality.

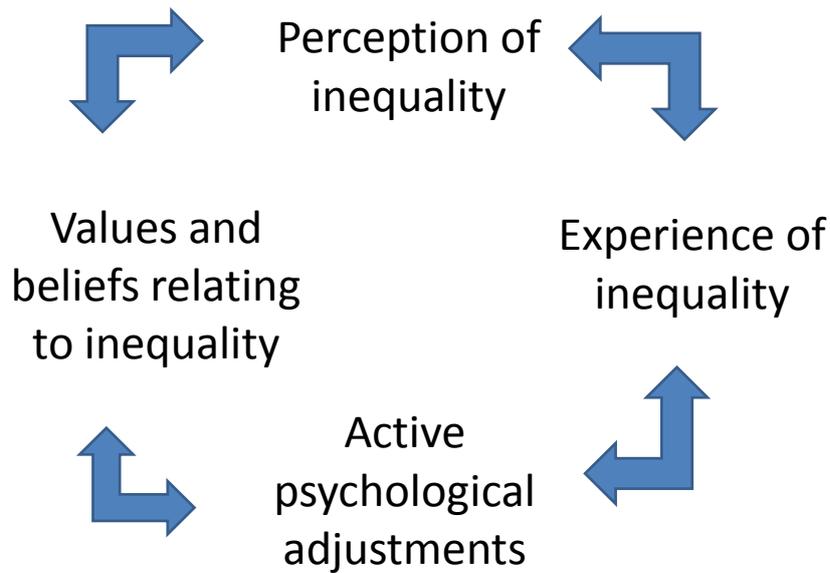


Figure 1: Factors influencing, and influenced by, perceptions of inequality

The figure above is included for illustrative purposes, and is not intended to make predictive claims. The likelihood is that the effect of one factor on another is not uni- or bi-directional; rather, each factor can act on any other factor, and this can in turn have a knock on effect on the other factors. Also, the nature of the impact of one factor on the other(s) is not predetermined. For example, the act of noticing (perceiving) inequality may make a person feel uncomfortable with the status quo, and so resort to justifying this through psychological adjustments; in this case, there isn't the intervening experience of inequality. To give another example, individuals who *believe* that there are societal differences with respect to how different social groups are treated, may actually *experience* inequality if they believe themselves to belong to the disadvantaged group; this in turn may entrench their perceptions of such inequalities in society.

In addition to the cognitive elements and the processes relating to inequality discussed above, there are also two *dimensions* of inequality. These refer to the *size* or *magnitude* of inequality, and the *principles* determining the allocation of resources and rewards. Such principles involve the competing notions of merit (achievement, skills, and effort), workload (amount of duties and responsibility), equality and need (whether human beings are equal, and whether they have the same needs), and ascription (what is due to individuals as a result of their

membership of a social, kinship, ethnic, racial, religious or gender group). There is tension between these principles as a system of rewards based on merit is quite different from that based on need, or a system based on ascription.

To give an example, a number of existing studies look at the size of inequality against the factors accounting for this, with income being one of the main factors. These studies usually refer to three of the cognitive elements – perceptions, beliefs, and judgements. These cognitive elements can therefore relate to both the size of inequality and, among other things, the principles governing the allocation of incomes. In this case, people make estimates about the magnitude of inequality, and about the extent to which merit, workload, need, and ascription determine the distribution of income. People also have beliefs about the degree of inequality that a society *should* have, and about the principles that *should* determine income. They can judge existing inequality (as they see it) to be too large or too small, or to be too much a reflection of a certain principle of distribution. The framework can thus be visualized as a 3 x 2 matrix consisting of the three cognitive elements and two dimensions (see Figure 2).

| | Size of inequality | Principles determining income |
|-------------|--------------------|-------------------------------|
| Perceptions | | |
| Beliefs | | |
| Judgements | | |

Figure 2: A framework for classifying comparative studies on public opinion about inequality

The three cognitive elements of inequality are interrelated. *Judgement* of existing inequality, for instance, will depend on the gap between *perception* and *belief*. The larger the discrepancy between people’s estimates of inequality and their ideas about just inequality, the harsher their judgement of existing inequality is likely to be (Sen 2000, Osberg and Smeeding 2006). There is also a strong link between *perception* and *belief*. As will be seen, people find it difficult to live with an inconsistency between how they perceive the world to be and how they think it should be, and they may therefore adjust their normative beliefs to ‘fit’ their perceptions. In other words, what they think ‘is’ may determine what they think ‘should be’ (Berger *et al* 1972, and Homans 1974, cited in Marshall *et al* 1999). Some studies have indeed found beliefs about legitimate income inequality to be linked to perceptions of

inequality (e.g. Gijsberts 2002, Kelley and Zagorski 2005). Finally, the two dimensions of inequality – viz. the *size* or *magnitude* of inequality, and the *principles* determining the allocation of resources and rewards – are also likely to be interlinked. Common sense would lead us to expect that people who believe that the principle of merit should determine income are likely to accept much larger income differences than people who think that income should be based on need. The links between the three cognitive elements and two dimensions of inequality warrant a comprehensive approach of this paper in reviewing research that include all these elements and dimensions.

Section Two: Perceptions of Inequalities

In this section, we take a cognitive psychological approach – and later also a social psychological approach – to understand how people perceive – or understand or evaluate – the situation they are in. Cognitive psychology is distinguished from other branches of psychology, such as behaviourism, in that it is the study of ‘the internal processes involving in making sense of the environment, and deciding what action might be appropriate’, including perception, reasoning and thinking (Eysenck and Keane 2010, 1). There is therefore an acceptance of these inner processes as being fundamental that is distinctive in this approach to understanding how individuals see and understand the world, and their behaviour. This contrasts with the approach of the behaviourists for whom ‘consciousness is neither a definite or a usable concept’ and, as a consequence, consider that internal processes as perception, thinking and emotion are not worthwhile objects of study to understand human behaviour (Watson 1930, cited in Anderson 2000, 9).

Explanatory Theories

This section provides an account of the biosocial, psycho-social, and social and political theories that have been put forward to explain not only why and how individuals perceive inequalities, but also their attitudes towards and manner of coping with such perceptions. Psychologists explain perceptions of inequality in terms of factors that can broadly be grouped under different categories. One category of explanations can be described as being of a biosocial nature. However, as will be seen, these theories of human behaviour usually admit of a cognitive element. Hence, there is a need for psychological theories that include

such an element. In addition, we also look at theories deal with social or political factors that enter into the perception of inequality.

Biosocial theories

One reason that is given for the human desire for equity of treatment is to do with prestige. Social psychologists like Barkow *et al* have attempted to understand the desire for prestige by studying it in the context of social rank and dominance among animals; in the case of humans, ‘natural selection has transformed our ancestors’ general primate tendency to strive for high social rank into a need to maintain self-esteem’, and the main way to do this is to seek prestige (Barkow *et al* 1975, 554). In the same way chickens literally have a pecking order, and chimpanzees structure themselves in terms of attention received, so human society is organised according to the concept of dominance, and the desire and effort to achieve this. In other words, the desire for dominance in the form of prestige can be explained in biological terms and, in this regard, human beings are no different from other animals.

Variations with respect to prestige may cause problems in human society. Indeed, some scholars believe that stress arising from social inequalities can have an impact on general health. Wilkinson (1996, 2005) has argued that the greater the degree of social inequality, the greater the stake individuals have in ensuring that they remain high in the social hierarchy, and the greater the stress they experience as a result; this kind of stress has a detrimental physiological effect on the body, particularly if it is long term (Wilkinson and Pickett 2010, 36ff).

We note that theories employing biosocial explanations of human reaction to inequality do admit of a cognitive element. Indeed, Wilkinson and Pickett (2010, 43) highlight the link between social inequality and social evaluation:

Greater inequality seems to heighten people’s social evaluation anxieties by increasing the importance of social status. Instead of accepting each other as equals on the basis of our common humanity as we might in more equal settings, getting the measure of each other becomes more important as status differences widen. We come to see social position as a more important feature of a person’s identity.

In a similar vein, Barkow *at al* note that the human species differ from other primates in that ‘we form social hierarchies on the basis of abstract principles and cognitive

evaluations and others' (1975, 554). With respect to the strategies among human beings to win prestige (i.e. being given prestige by other people), understanding the system of prestige is only possible because man has developed into 'a symbol-using species under strong selective pressure to incorporate socially transmitted norms into our cognitive maps' (Barkow *et al* 1975, 554).

In other words, there are shared understandings as to the nature and function of status or prestige, the way this is recognised, and the conditions under which it is given. In addition, as we shall see, when people fail to win status or prestige, their coping strategies include 'cognitive-distortion tactics', which includes 'distortions of information concerning the self' (Barkow *et al* 1975, 556). In other words, biological theories may explain *some* of human behaviour as to why people may desire equality, or how they may react to inequality, but not all or even most of it. This means that we need to take into consideration explanations that include the element of cognitive or mental activity. These explanations – which are drawn from different fields of research, including psychology, sociology, social psychology, and political science – will be discussed in the next section.

Psychological theories and explanations

Some of the explanations are psychological in nature, i.e. they pertain to the individual.

(i) Individual characteristics, and personal values, attitudes, and standards

To begin with, individual history and experiences may influence one's outlook on life, including one's attitude towards inequality. Summarising research done by Alesina and Angeletos, Alesina and Fuchs-Schundeln, Alesina and Glaeser, Benabou and Tirole, Corneto and Gruner, Esping-Andersen, Giuliano and Spilimbergo, and Piketty, as well as their own work, Alesina and Giuliano (2009, 2) note the following:

- i. experience of misfortune may 'make people more risk-averse, less optimistic about their future upward mobility and more inclined to equalize everybody's income';
- ii. 'different cultures may emphasize in different ways the relative merits of equality versus individualism';

- iii. these cultures are likely to be the product of political ideology and the indoctrination of such ideology;
- iv. parents may ‘purposely transmit ‘distorted’ view about the reality of inequality and social mobility in order to influence their incentives (to work harder)’; and
- v. ‘the structure and organization of the family may make people more or less dependent and therefore favourable to government intervention in distributive matters’.

To begin with, early experiences may have long lasting effects on attitudes. For instance, Uslaner (2002) argues that experience of stress and lack of trust in family relations in the early years can reduce the child’s levels of trust in later life. Similarly, experiences that occur at an impressionable time in an individual’s development may also have long lasting effects on her attitudes and values. As Alesina and Giuliano observe:

social psychologists point out that there is a socialization period in the lives of individuals during which socializing influences have the most profound impact: values, attitudes and world-views acquired during this time period become fixed within individuals and are resistant to change. Evidence of significant socialization have been found between 18 and 25 years of age (the so-called ‘impressionable years hypothesis’) (Alesina and Giuliano 2009, 19).

The young people in our study range from 15 to 30 years, and can therefore be said to belong to this group. If the ‘impressionable years’ hypothesis is true, then the views of these young people may represent the views of the next generation of adults.

In addition to individual history and experiences, demographic characteristics, such as ethnicity, social class, educational background, income, gender, ideological preferences, etc., have also been found to play a role in influencing whether and how the perception of inequality. Robinson (1983) found that race and homeownership came into play in the perception of inequality in the US, but that only race did so in the UK. He found in his study that, ‘Nonwhites and renters in the US sample perceived more class and racial inequality than whites and home-owners, and nonwhites in the English sample perceived more racial inequality than whites’ (Robinson 1983, 357). Using data from the General Social Survey, Alesina and Guilano (2009) carried out interesting work on preferences for redistribution in society. They found that, certain individual characteristics were linked with such preferences in the US:

- (1) personal wealth (the more wealthy a person, the less likely he is to favour redistribution);
- (2) race (blacks favoured redistribution more than whites);
- (3) gender (women were more likely to favour redistribution than men);
- (4) education (educated people were more likely to oppose redistribution);
- (5) political ideology (left wing ideologues favoured redistribution more than right wing ones);
- (6) religion (a religious upbringing was associated with being pro-redistribution);
and
- (7) immigration (the presence of immigrants tended to predispose locals to being less favourable to redistribution).

Alesina and Giuliano also reported that the factors of education and political ideology interacted with, and reinforced, each other, e.g. educated and left wing ideologues tended to be even more pro-redistribution than those possessing just one of these factors. At the same time, views tended to change with age, with young people starting off being pro-distribution, and then less becoming favourable to this as they got older and, presumably, more well off.

Some of the findings from the US data were supported by the findings using data from the World Values Survey (2000). For instance, Alesina and Giuliano found that it was generally the case that:

Women, youth, the unemployed and left-wing people are more pro-distribution. Income and education reduce the desire for redistribution, but, as in the US, education has a positive effect on redistribution when interacted with political ideology. Believing that luck is more important than work increases the desire for redistribution. (Alesina and Giuliano 2009, 21)

One major difference between the US and World Values Survey data was that – apart from the Orthodox – individuals in the US with religious backgrounds were less favourable to redistribution than atheists.

Hence, personal characteristics and experiences have a role in influencing the individual's values and attitudes with regard to inequality. It was earlier suggested that these may also be affected by, or drawn from, prevailing social and ideological norms. More will be said about such norms in the next section.

(ii) The individual's decision making process

An important factor in whether and how individuals perceive inequality relates to the complex calculations that enter into such construals. To determine equity in an exchange, individuals make calculations involving estimations of what they have invested in that situation, and what they think they should get out of it; in other words, they consider their inputs and the outcomes. Psychologists sometimes express such calculations in the form of a formula, with individual inputs and outcomes as components (Adams, 1965). Researchers who approach inequality in this way typically define it along the following lines:

Inequity exists for a Person whenever he perceives that the ratio of his outcomes to inputs and the ratio of Other's outcomes to Other's inputs are unequal. This may happen either (a) when he and Other are in a direct exchange relationship or (b) when both are in an exchange relationship with a third party and Person compares himself to Other. The values of outcomes and inputs are, of course, as perceived by Person. (Adams 1965, 280)

No doubt there is a degree of idiosyncrasy in terms of the particular formula used by an individual, the variables used for the inputs and outcomes, and the weight that is put on these. Having said that, the individual will probably also draw on the extant norms, value systems and myths available to them in their society, about which more will be said in the next section.

(iii) Individual psychological reactions to situations

Research in the field of psychology show that, when faced with a set of circumstances, a person may try to evaluate whether – all things being constant – it can be considered equal or just and, if not, how she should react to it. An option in a situation of inequality is to make adjustments to 'fit' what she sees or experiences, to her principles and beliefs.

a. Changing one's inputs or outcomes

Researchers have found that, given a situation of inequality, an individual may decide to change his input or outcome; this is often the first line of action (Adams 1965). If an individual judges his remuneration as having been inequitable, for instance, he may decide to work fewer hours or less hard so that his input 'matches' the outcome he receives. Alternatively, he may attempt to change the outcome. Adams (1965) refers to research by

Homans which demonstrate how clerks who felt they were underpaid expected their union to redress this, and changed unions when the latter failed to do this.

b. Making psychological adjustments

There may be situations where individuals are powerless to change their input or output. In such cases, they may resort to what Adams (1965) refers to as the cognitive distortion of inputs or outcomes, which is a psychological weapon of last resort. The theory is that people find it difficult to live with an inconsistency between the inequality and injustice they perceive the real world, and how they think the world should be. Given a gap between the two, they may adjust their normative beliefs to fit their perceptions (Berger *et al* 1972 and Homans 1974, cited in Marshall *et al* 1999, Gijssberts 2001, Kelley and Zagorski 2005).

Alternatively, individuals may adjust their attitude towards the beneficiaries and victims of inequity. Adams (1965) and Rubin and Peplau (1975) cite the experiments by Lerner and his associates in the 1970s in which students believe that a fellow student was being given electric shocks. Given the choice, the students opted to compensate the 'victim'. However, when this option was not available to a second group of students who were given to believe that the victim would continue to suffer, this group rated the victim less favourably than the first group. Lerner's conclusion was that, faced with the prospect of the continuation of suffering that they could not ameliorate, the students tried to reconcile this dissonance – the 'gap' between their belief in fairness and the unjust suffering they saw before them – by rejecting the victim, and seeing her as deserving her fate. Blaming the victim, and attributing the cause of success to the successful, helps individuals maintain their belief that the world is just; Rubin and Peplau cite Heider as viewing a belief in a just world to be a 'pervasive cognitive tendency, stemming from the more general principle of cognitive balance' (Rubin and Peplau 1975, 68).

Hence, when individuals perceive a situation as being unequal and unjust, and when they are unable to change the inputs or outcomes, they may attempt to redress the mental conflict they experience by doing a number of things: they may adjust their norms to 'fit' the reality, or they may over-estimate the inputs of the person who benefits from the exchange or relationship, or 'derogate' - or put down - the person or input of the person who suffers from it. As Rubin and Peplau put it (1975, 71):

To disparage or resent an innocent victim of circumstance seems an unusual reaction. But it is precisely the sort of reaction we would expect from people who tend to perceive victimization in terms of an underlying moral order.

Rubin and Peplau explain the need to believe in the just world with reference to the cultural backdrop in Western societies in which individuals are taught from their childhood that good is rewarded and evil is punished, beliefs which are supported by religions such as Judaism and Christianity. Even in extreme cases of injustice and violence, individuals appear to have a need to justify these. Mann, in his study of Nazis in death camps, shows how some Nazis justified the killings by blaming the Jews as being the cause of the war, or a danger to Germany, or by regarding them as not being human (2005, 244-5, 256 and 267) and, thus, as deserving their fate.

In the less extreme context of education, studies show that less successful students may either over-estimate levels of fairness in order to reinstate a comforting belief in a fair world (Meuret and Desvignes 2003) or, conversely, underestimate them so as to attribute failure to other causes. Hence, the belief in a just world may serve psychological functions: it justifies what happens to oneself and others by apportioning praise and blame in such a way as to make these seem deserved. The process boosts the individual's self-perception or self-efficacy by giving the impression both that there is justice in the world, and that she has a degree of control over her life (Mann 2005).

Rubin and Peplau (1975) note that belief in a just world is linked to a number of factors:

1. authoritarianism (which does not generally allow for 'cognitive inconsistency');
2. trust (the stronger the belief in a just world, the less likely the individual is to be suspicious of others);
3. religiosity (particularly the belief in an active God);
4. the Protestant Ethic; and
5. an internal locus of control (viz. 'the expectations that one can determine one's own rewards and punishments, rather than being at the mercy of external forces'). (Rotter, cited in Rubin and Peplau 1975, 77-79).

Rubin and Peplau (1975) further observe that there may be 'situational as well as individual variations in people's perceptions of justice' (p. 68). They point out that people are more

likely to see suffering as being deserved if this happens to others; they are also more likely to believe their rewards to be deserved.

It would be interesting to see whether variations in perceptions of inequality in the societies in our study are linked to, or can be explained by, any of the above factors. Whatever the factors associated with belief in a just world, Rubin and Peplau are of the opinion that - because this belief induces people to blame the victim - it may discourage them from taking action to correct injustices in the world. In other words, individuals who believe in a just world are either less likely to see inequality where this exists, or to see inequality as being deserved; as a result, they are unlikely to take civic or political action to correct this.

c. Individual attitudes

In addition to personal characteristics which affect psychological adjustments, individuals may also have attitudes that are linked to their perception of inequality, e.g. trust, tolerance, a sense of self-efficacy, or the outlook with respect to their involvement in civic participation. The questionnaires used in our study include items designed to capture some of these elements, and the findings are also followed up on in the interviews.

So far we have looked at the theories that attempt to explain how *individuals* perceive or construe a situation as being unequal and unjust, and the way they respond to this. Other theories deal with social or political factors that enter into the perception of inequality. Only these can adequately explain cross-country differences in cognitive elements of inequality.

Social and political theories

In trying to identify the social or political factors that enter into the perception of inequality, scholars generally refer to social norms, and myths and mythologies.

(i) Social norms

Perceptions of inequality are influenced by standards adopted by individuals in terms of what they consider to be unequal or unjust. These individual standards may resonate in terms of macro-factors, in that these may – for instance – be drawn from societal norms which may, in turn, be associated with extant conditions or universal principles.

Whether a person sees a situation as being equal or just depends in part on the norms used. Some of these norms may be based on extant conditions. For instance, a daily rate of US\$2.50 may seem a pittance to someone from a developed country, and not a fair wage, but to an Indonesian factory worker this amount may seem fair because this is what all her fellow workers are earning. Hence, the norms that individuals apply – whether universal or extant – will affect the evaluation at which they arrive.

On the other hand, there are norms that are based on universal principles, e.g. ‘All men (*sic*) are created equal’. However, the conception of social justice to which such norms appeal may vary. Luebker (2004) notes, for instance, that social justice can be conceived in two ways:

First, social justice can be conceptualized as individual equity and equal opportunity, according to which society should maintain free access to success for everyone and leave individuals in charge of their own economic progress or failure. The market is then seen as a system that distributes fair rewards according to achievement, and differences in income primarily reflect differences in effort or preferences ... By contrast, egalitarian conceptions of social justice focus on equality of outcomes. These are perceived as often lying outside an individual’s direct influence, and can be caused by factors such as social barriers, lack of ability, or simply bad luck ... The state is seen as responsible for caring for the welfare of its citizens, for preventing their social exclusion, for granting them full and effective citizenship including social rights, along with the traditional rights of freedom that derive from the liberal tradition (Luebker 2004, 4-5).

Hence, what one considers unequal - and how such inequality should be addressed - depends on societal norms and the conception of social justice used.

Whatever the case may be, norms are socially constituted. As Adams (1965, 279) puts it:

There exist normative expectations of what constitute ‘fair’ correlations between inputs and outcomes. The expectations are formed – learned – during the process of socialization, at home, at school, at work. They are based by observation of the correlations obtaining for a reference person or group – a co-worker or a colleague, a relative or neighbour, a group of co-workers, a craft group, and industry-wide pattern.

Basically, individuals learn about fairness through the norms applied to their reference group: if they are treated the same way other members of the group are treated, their treatment would seem fair. However, as will be seen later, this can also give rise to phenomenon of

relative deprivation. Whatever the case may be, the norms themselves require a macro-level explanation that goes beyond the individual.

Differences in social norms may explain some of the variations in attitudes towards inequality. There is a commonly held view, for instance, that inequality is more acceptable in the US than in Europe. Luebker (2004) cites work by Alesina *et al*, Roller, and Wegener and Liebig, as showing this. Even within Europe, there are differences in the degree of tolerance for inequality, and Svallfors demonstrates that the British generally accept a higher degree of inequality than do the Swedes (cited in Luebker 2004).

Cultural and political differences could also account for different preferences with respect to redistribution. Alesina and Giuliano found that the English speaking countries of the US, Australia and New Zealand, and Asian countries, were least in favour of redistribution, and the Eastern European countries most favourable; Latin America and the Northern European countries occupied positions in between these two groups (Alesina and Giuliano 2009, 21).

If the preference for redistribution can be regarded as a proxy measure for the perception of equality and attitude towards social justice and if, as has been suggested, individuals draw their norms from society, we would expect the responses of the young people in our study to vary according to their national, socio-political and cultural background, as well as their personal history. Hence, in societies where the family undertake welfare support for less fortunate members, we should expect to find attitudes to inequality and state provision different from those in societies where a bigger role has traditionally been played by the state. Even within the same country, a person who has experienced misfortune and deprivation can be expected to have a different response to inequality compared to one who has had a relatively privileged middle class upbringing.

In his study based on data from 38 countries in the International Social Survey Programme (ISSP), Luebker (2004) found clear differences between countries in terms of whether individuals considered existing income inequality to be too great: for instance, over 90% of Eastern Europeans (e.g. Bulgarians, Latvians, Russians, and East Germans) thought this was the case, as compared to just 75.7% in West Germany. Luebker suggests: 'This ... indicates that people who grew up in different societies can perceive identical issues - in this case, the income distribution of reunified Germany - quite differently' (p. 5). Luebker also found that

countries that agreed with an egalitarian conception of social justice generally tended not to tolerate large differences in income.

Hence, social norms may vary from one culture to another, or one political system to another, and may account for variations in attitudes towards inequality and social justice.

(ii) Myths and ideologies

Extant norms – which are the commonly held beliefs, values, and understandings in a society – may derive from a larger or dominant ideology or set of myths (Robinson 1983). In Robinson's critically conceived definition, a dominant ideology is 'a pervasive set of beliefs that broadly serves the interests of the dominant class, which when adopted by the subordinated class, prevents their raising an effective opposition' (Robinson 1983, 352). Robinson refers, for instance, to the myth of the American dream, which is often used to explain why Americans are willing to tolerate a high level of inequality in their society. Because of the belief that everyone regardless of origin has the opportunity to succeed in their society – the explanation goes – Americans tend not to mind a high level of inequality because they believe that *they* could one day enjoy such success. In this respect, Robinson (1983, 353) notes, the 'myth' of the just society performs an equivalent role in British society; in this case, it predisposes individuals to be blind to inequality and injustice because this would contradict their belief that society is governed by principles of fairness.

The point should be made the belief in the American Dream, or the just society in the case of the UK, are just myths. The reality is that the high levels of inequality in societies like the US tend to be correlated with lower levels of social mobility (Esping-Andersen 2005). Even in an earlier age – at the start of 20th Century – Sombart (1976) was sceptical of the supposedly high levels opportunity and social mobility when, in fact, these were rather limited in America. A century on, Wilkinson and Pickett (2010) would probably agree. They note that, compared with developed countries like Canada, Denmark, Finland, Germany, Norway, Sweden, and the UK, the US has the lowest social mobility rate (p. 159). Nonetheless, myths may still have a powerful hold over the imagination of ordinary people.

If so, the project researchers would need to be alert to the prevailing myths and ideologies of the societies in which the study is being carried out. For instance, many of these societies

have adopted the principle of meritocracy and, while this may serve a societal function, it may also justify the system of reward.

(iii) Meritocracy, and opportunities for advancement

It was earlier suggested that individuals may be willing to tolerate inequality in outcomes if they think there are opportunities for advancement. It was seen in the case of the American myth, that it is sometimes sufficient that they *believe* this to be the case. Nonetheless, it may be helpful if this *were* indeed the case. Equality of condition or opportunities can take the form of access to resources that would enhance the chance of finding a good position in future (e.g. education and training), or that would open up actual opportunities (e.g. jobs, promotions, and social advancement). In many societies, such opportunities take the form of institutionalised meritocracy, where the criteria for access to opportunities and success are talent and effort. At the same time, meritocracy can also be used to explain or justify why some people succeed while others do not.

(iv) Social circumstances

It was also earlier seen how personal experiences at an impressionable period may determine one's attitude to inequality and social justice in later life. Such personal experiences may arise from individual circumstances, e.g. the person may experience financial hardship as a result of her parents' divorce. However, these experiences may also be related to prevailing social or political events and conditions. Robinson (1983, 355) points out that there were instances in the 60s and 70s when there was a 'rediscovery' of poverty and inequality' in the US and England. This awareness need not refer to actual worsening levels of poverty and inequality, merely to a change in *perception* and *understanding* of these indices. To give another example, a person who grew up during the Civil Rights movement, or at a time when the political debate was dominated by issues such as the discrimination and exclusion of minority religions and ethnic groups, will arguably be socialised into the corresponding norms, and be more aware of the inequality and injustice experienced by these groups. Such social circumstances and extant conditions may interact with some personal historical factors. Hence, a child growing up in conditions of poverty and deprivation during an economic recession may well view inequality – and the state's role and responsibility to alleviate this – quite differently from one who has grown up in poverty during a period of economic boom.

In addition, the group with which an individual identifies may also make a difference. Adams (1965) notes that it is sometimes not the remuneration per se that is the main factor in a person's judgement of equity of treatment; it is the remuneration *relative to* the individuals or groups against whom he compare himself. Adams cites a study in which members of the Air Corps and the Military Police stationed together were treated similarly given their educational background and job; however, the former were more dissatisfied with their remuneration because of the discrepancy between what they actually received, and what they expected to receive as members of the Air Corps, i.e. what others in the group with whom they identified received. Adams referred to this phenomenon as 'relative deprivation' (1965, 268ff).

(v) Meso-level factors

In addition, there may be factors at the meso-level (of a local or regional nature) that influence perceptions of inequalities. Robinson (1983) suggests that these may include:

- (i) the size of ethnic or class groups;
- (ii) population density;
- (iii) the effect of the education system (e.g. the 'mix' in schools); and
- (iv) whether the group one belongs to is 'at threat' from other groups, or in competition with those groups for resources.

Some of these factors may be pertinent to the countries participating in our research project, which takes place at a time when these countries have experience a net influx of immigrants (either through asylum or immigration policy, or economic policy aimed at attracting foreign talent). In some of these countries there has been a backlash against immigrants who are seen as competing for jobs, welfare and other resources, particularly in areas of high concentrations of immigrants.

Hence there are a number of factors – including social norms, myths and ideologies, meritocracy and opportunities for advancement, social circumstances, and meso-level factors – that may affect perceptions of and attitudes to inequality. It is worth noting, as Robinson points out, that there may be little, or even no, link between perceptions of inequality and

actual inequality. This is because ‘people being differentially placed socially, experience different parts of society, and because group interests, values and societal myths colour perception’ (Robinson 1983, 351). However, as the literature suggests, *perceptions* of inequality matter because these influence values towards inequality, and attitudes to those suffering from inequality, as well as behaviours relating to civic participation, including efforts to redress injustice. The preceding sections present the conceptual framework and the theoretical hypotheses relating to the perceptions of inequality, and form the basis of the Perceptions of Inequalities project.

The next section will examine in closer detail the findings of empirical research on the impact of macro-level conditions on the cognitive elements (perceptions, values and judgements) of inequality. It will also examine the cross-country differences in these cognitive components, and the two dimensions of inequality (viz. the size of inequality, and the principles determining the allocation of resources). We hypothesise that the cognitive elements have an independent effect on social cohesion, and we will devote the last section on the review of the empirical studies to analysing the effects of these elements on important social outcomes like trust, participation, tolerance, etc. All this will serve to identify the shortcomings, limitations, and gaps in the literature, some of which our Perceptions of Inequalities project aims to remedy.

Section Three: Societal Determinants of the Cognitive Elements of Inequality

In this section, we review international comparative studies, as such studies allow us to assess the influence of *societal* level conditions on the cognitive elements of inequality. Here, we only review studies examining these cognitive elements as dependent variables. Research that focuses on these cognitive elements usually deals with inequalities of income as these relate to *one’s own society*. This means that single country studies – such as those looking at views of racial or gender inequalities, those examining perceptions of one’s own income in relation to that of others, and those exploring opinions of international income inequality – will be omitted. Studies of attitudes to redistribution and public welfare will also be excluded from the review as such attitudes are about public policy; these attitudes may be important outcomes, or correlates of views on inequality, rather than constituting such views themselves.

We will first classify the studies we review using the framework developed in Section One (see Figure 2 for this classification). We then discuss several influential theoretical perspectives, highlighting macro-level conditions explaining cross-country variation in views on inequality. Third, we assess the extent to which the findings of the reviewed studies support these perspectives. And, fourth, we identify key omissions and shortcomings in the themes covered and approaches used in the reviewed studies.

A Framework Mapping Existing Research

We proposed a framework in Section One to classify the comparative studies. The framework includes three cognitive elements and two dimensions of inequality. As identified above, the three cognitive elements comprise *perceptions*, *values*, and *judgements* of inequality, while the two dimensions refer to the *magnitude* or size of inequality, and the *principles* determining the allocation of income.

In this section, the selected studies are mapped onto the three cognitive elements and the two dimensions (see Figure 3 below). It should be noted that a study may appear several times, depending on the number of cognitive elements and dimensions it addresses.

Two observations can be made. First, there are almost no studies exploring all the three cognitive elements and two dimensions. We have found only one study (Redmond *et al* 2002) that examines all three cognitive elements. This study found that the gap between perceptions of principles governing the actual distribution of income, and values about the principles that should govern the allocation of incomes, was much larger in Eastern European (*viz.* post-communist) countries than Western European countries (*viz.* Western Europe, and the English-speaking countries of the Australia, Canada, New Zealand, and the US). It further found Eastern European nations to be much more disapproving of existing inequalities than Western European ones. This pattern of findings led the authors to postulate that it was the mismatch between beliefs and perceptions, which partially explained the stronger disapproval of people in Eastern Europe. This hypothesis is in line with the aforementioned assumption that judgements are a function of perceptions and beliefs. Yet, as the study by Redmond *et al* only presented descriptive statistics, it was not able to test this hypothesis fully. Thus, neither the presumed linkages between the three cognitive elements of inequality, nor those between the two dimensions, have been scrutinized adequately by existing empirical research.

Second, we have not found any studies that examine judgements about the fairness of existing inequalities with regard to the distributive principles they reflect (as displayed by the empty box in Figure 2). The lack of such studies may well be due to the difficulty of capturing such judgements in public opinion surveys, as items would have to be developed asking respondents whether they felt that the existing allocation of incomes *sufficiently* reflected any principle of distribution they held dear.

| Studies examining the cognitive elements of inequality descriptively, or as dependent variables | | |
|---|--|---|
| | Size of inequality | Principles determining income |
| Perceptions | Kluegel <i>et al</i> (1995) Örkény and Székelyi (2000) Osberg and Smeeding (2006) Kenworthy and McCall (2007) | Marshall <i>et al</i> (1999) Kreidl (2000) ¹ Örkény and Székelyi (2000) Redmond <i>et al</i> (2002) Alesina and Glaeser (2004) ¹ Duru-Bellat (forthcoming) |
| Values | Kelley and Evans (1993) Arts <i>et al</i> (1995) Mason (1995) Svallfors (1997) Gijsberts (2002) Redmond <i>et al</i> (2002) Luebker (2004) Kelley and Zagorski (2005) Osberg and Smeeding (2006) | Kluegel and Mateju (1995) Swift <i>et al</i> (1995) Wegener and Liebig (1995) Marshall <i>et al</i> (1999) Örkény and Székelyi (2000) Arts and Gelissen (2001) Redmond <i>et al</i> (2002) Kunovich and Slomczynski (2007) Green, Janmaat and Han (2009) Duru-Bellat (forthcoming) |
| Judgements | Mason (1995) Verwiebe and Wegener (2000) ² Suhrcke (2001) Redmond <i>et al</i> (2002) Luebker (2004) Hadler (2005) Luebker (2007) Kenworthy and McCall (2007) | |

Figure 3: A framework for classifying comparative studies on views on inequality (with selected studies)

¹ These authors have examined popular ideas about the causes of poverty. We understand such ideas to be a subset of perceptions of the extent to which various principles determine the distribution of income.

² These authors have created a construct representing the gap between perceptions of actual income and beliefs of just income, and used this construct as a proxy for judgements of actual income inequality.

Perspectives on Cross-National Differences in Views on Inequality

From the existing studies, five perspectives can be identified as making claims with respect to the magnitude and origin of cross-national differences in views of inequality. The first three perspectives – which, for ease of reference, we will call the modernist, the cultural, and the regimes perspectives – have different views on the size of these differences; the last two perspectives – the micro versus the macro perspectives – diverge with regard to the nature of the conditions held to affect views on inequality.

In the modernist perspective, people's values and attitudes reflect the socio-economic conditions in their societies (Inglehart and Welzel 2005). The hypothesis is that societies at the same stage of economic development have many conditions in common, and should therefore exhibit more or less the same cultural patterns. As Western societies have similar structural features – these are all affluent, post-industrial, and knowledge – and market-based economies – their populations should broadly think in similar ways about a wide range of topics. Among other things, meritocratic beliefs and perceptions should be particularly strong in such societies because of the requirements of their market economies (Miller 1992, Kelley and Zagorski 2005). Key features of such economies – such as competition (resulting in winners and losers), and a system of unequal rewards based on achievement (in order to motivate workers to work harder and improve their skills) – would not function if people did not accept the idea that merit should determine income. By implication, populations of developing countries and non-market societies should have rather different views on inequality.

The cultural approach contrasts strongly with the modernist perspective in that it postulates sizeable cultural differences between socio-economically advanced countries, and rejects the idea of a singular path of socio-economic development. As Bendix (1964, p. 1) puts it:

Belief in the universality of evolutionary stages has been replaced by the realization that the momentum of past events and the diversity of social structures lead to different paths of development, even where the changes of technology are identical.

In this approach, the belief is that attitudes on inequality should differ widely across Western countries as these are part of uniquely evolved cultures rooted in different historical and religious traditions. These cultures are seen as exogenous, almost immutable, entities fundamentally shaping values, attitudes and behaviour (e.g. Huntington 1996, Harrison 2000).

The cross-national variations in cultures ensure that people respond differently in terms of their attitudes to the same socio-economic challenges and processes. Major cultural fault lines can even occur within countries, resulting in pronounced intra-country differences in mentality and socio-economic development, as Putnam (1993) has sought to demonstrate in the case of Italy.

A group of scholars claiming American ‘exceptionalism’ in welfare policies and public opinion on inequality and redistribution represents a strand of literature that exemplifies the cultural perspective (e.g. Lipset and Bendix 1959, Alesina and Glaeser 2004). These scholars argue that, because of the unyielding belief in America as the land of unlimited opportunities in which everybody can ‘make it’ as long as she tries hard enough, Americans are much more tolerant of inequalities than Europeans, pass harsher judgements on the poor, and are much less supportive of redistribution.

The third perspective originates from the field of comparative political economy, and postulates the existence of different regimes or varieties of capitalism within the Western world (e.g. Esping-Andersen 1990, Hutton 1995, Iversen and Stephens 2008). This perspective may be seen as partly complementing the modernist perspective, and partly providing a critique of it. It does not challenge the modernist claim that countries at the same stage of development have more in common than countries at different stages of development, but argues that modernists have ignored important differences among Western countries. It differs from the modernist approach in its vantage point: while the latter adopts a global perspective, the regimes approach focuses on Western countries, and seeks to explain lingering and newly emerged differences among these countries with respect to their institutions, economic structures, and cultural preferences. Regimes are understood to be unique configurations of cultural, institutional, and socio-economic conditions framing people’s ideas and behaviours. They are shaped by technological and socio-economic development, and are not attributed the same degree of path dependency as cultures in the cultural perspective. Unlike culturalists, regime theorists acknowledge the importance of social and political struggles with respect to the distribution of resources in shaping the world of ideas. Regimes are considered the product of such struggles, the outcomes of which cannot be predicted in advance. Although regime theorists thus share the materialist outlook of modernists, they disagree with the latter about the source of values and perceptions, as well as the degree to which these can be predicted from socio-economic conditions.

Esping-Andersen proposes the existence of three regimes characterising the welfare states of Western countries. He discerns a liberal, a social democratic, and a conservative regime predominating in the English-speaking, Scandinavian, and the original six European Union countries respectively. Countries with the liberal regime primarily rely on the market as the allocator of resources. State intervention is comparatively low, as is the level of welfare benefits, which are means-tested and based on needs. The state plays a much larger role in the distribution of resources in the social democratic group. Welfare benefits are at a much higher level, and are seen as fundamental citizenship rights. The welfare arrangements in countries with a conservative regime are based on the male breadwinner model. Benefits are income-related, and linked to previous earnings. Traditional gender roles and patriarchal thinking predominate, making it difficult for women to pursue a career in the labour market. Green, Janmaat and Han (2009) and Green and Janmaat (2011) have explored whether Western societies can also be labelled as liberal, social democratic, and conservative in terms of their models of social cohesion. They conclude that Esping-Andersen's typology can indeed be extended to social cohesion, with the sole qualification that 'social market' is deemed to be a more appropriate label to characterise the social cohesion model in original EU six countries than 'conservative'. They postulate that notions of freedom, opportunity, and private initiative have sustained the public legitimacy of the liberal regime of social cohesion; that equality and solidarity ensured by the state form the ideological bedrock of the social democratic regime of social cohesion; and that the retention of status differences between professions, genders, and ethnic groups in addition to state intervention and institutional embedding are key to the stability of the social market regime of social cohesion. Based on the work of Esping-Andersen and Green *et al*, one could postulate that meritocratic convictions and inegalitarian preferences should prevail in the English-speaking countries, egalitarian beliefs in the Scandinavian countries, and ascriptive beliefs discriminating between men and women, and between the native majority and immigrant minorities, in the original six EU countries.

The fourth and the fifth perspectives can be seen as contrasting approaches. In the former – which we might call the micro- or methodological individualist approach – cross-national differences in the cognitive elements of inequality are simply the result of differences between populations in their composition (Haller *et al* 1995, Gijsberts 2002). In this view, only individual attributes such as occupational status, education, gender, and age shape

perceptions, values and judgement on inequalities, and nations differ in the composition of these attributes because of differences in economic structure (e.g. whether the economy is more service- or manufacturing-oriented). Hence, the belief is that cross-national differences with respect to the cognitive elements of inequality will disappear when these individual characteristics are controlled for. This approach is sometimes equated with the modernist approach as both approaches link attitudes regarding inequality to socio-structural characteristics of societies (e.g. Kluegel *et al* 1995b).

The macro perspective, in contrast, assumes that certain *societal* conditions can explain cross-country differences in views on inequality. These conditions are not mere aggregates of individual characteristics – as in the micro perspective – but genuine properties of societies, irreducible to individuals. In Durkheim’s terms, they are social facts which are ‘real’ in themselves, and more than the sum of their parts. As in the cultural approach, attitudes towards inequality are also thought to differ substantially across Western countries; the difference is that the macro perspective does not see such attitudes as only reflecting distinct cultures or qualitatively different regimes, but also as properties that relate in a systematic linear fashion with macro-level socio-structural conditions.

Findings

In this section, we identify three groups of international comparative studies: (1) East-West European studies, (2) cultural studies and (3) micro-macro studies. This categorisation has not been informed by theoretical concerns, but simple reflects the themes of the available research literature. We also describe what the findings of this disparate collection tell us about the modernist/functionalist and cultural/regimes, and the micro and macro perspectives.

(1) East-West European studies

This group of studies broadly explores whether the experience of living under communism, and exposure to its official rhetoric of equality, have had a lasting impact on the attitudes of East European nations on issues of inequality and social justice (e.g. Kelley and Evans 1993, Arts *et al* 1995, Kluegel and Mateju 1995, Gijsberts 1999, Marshall *et al* 1999, Örkény and Székelyi 2000, Verwiebe and Wegener 2000, Suhrcke 2001, Gijsberts 2002, Redmond *et al* 2002, Kelley and Zagorski 2005). Do people in the Eastern Europe continue to have very

different attitudes on inequality, or has the transition to democracy and the adoption of a market economy prompted an attitudinal change in the direction of Western public opinion? Studies attempting to answer these questions invariably compare attitudes in Eastern and Western Europe using data from either the International Social Survey Programme (ISSP) (modules 1987, 1992, and 1999) or the International Social Justice Project (ISJP) (modules 1991 and 1996). This literature has yielded the following findings.

(1) *People in both Eastern and Western Europe think that the principles of merit and workload should determine income. These attitudes seem to be stable.*

People everywhere believe that effort, achievement, skills, and job responsibility should be more important in determining income than need or group membership (Marshall *et al* 1999, Örkény and Székelyi 2000, Redmond *et al* 2002). These attitudes seem to be quite enduring in both Eastern and Western Europe, and studies using the 1999 round of the ISSP (Redmond *et al* 2002) and the 1996 round of the ISJP (Örkény and Székelyi 2000) find exactly the same pattern as those using the 1992 round of the ISJP (Marshall *et al* 1999, Örkény and Székelyi 2000).

(2) *People in both regions have similar and enduring beliefs about which jobs should be paid more and which less.*

People in Eastern and Western Europe rank occupations in the same way regarding the income held to be legitimate for these occupations (Kelley and Evans 1993, Gijsberts 1999, Gijsberts 2002)³. These beliefs seem to be stable as people made similar rankings in the 1987 and 1992 rounds of the ISSP (Gijsberts 2002)⁴.

³ These scholars used the following item in the ISSP survey: “Next, what do you think people in these jobs *ought* to be paid – how much do you think they *should* earn each year before taxes, regardless of what they actually get ... (a) First, *about* how much do you think a bricklayer *should* earn?” <idem for other occupations>.

⁴ On the surface, beliefs about a legitimate hierarchy of earnings seem to fall somewhat outside our conceptual framework as these constitute neither beliefs about a fair size of inequality nor beliefs about legitimate principles determining income. However, if different occupations are seen to involve different degrees of achievement, effort, and workload, beliefs about a legitimate income hierarchy could be interpreted as beliefs about legitimate principles determining income.

(3) *People in Eastern Europe have come to accept ever larger degrees of income inequality, while the degree of income inequality held to be legitimate in the West has hardly changed.*

While East European nations preferred a much smaller degree of income inequality than West European nations in 1987 (Kelley and Evans 1993, Gijsberts 1999, 2002), by 1999 they favoured much more inequality than nations in the West held to be legitimate (Kelley and Zagorski 2005). In sum, while beliefs about the *principles* that should govern pay appear to be quite stable in both regions, beliefs about *legitimate degrees* of income inequality are quite changeable in Eastern Europe, and relatively stable in Western Europe.

(4) *People in Eastern Europe think that non-meritocratic factors (wealth, contacts, and corruption) are much more important than meritocratic principles in determining actual incomes, while people in Western Europe think the opposite is the case. The former seem to have grown more cynical over time.*

The reviewed studies found large differences between Eastern and Western European countries with regard to the perceptions of the factors influencing existing incomes (Marshall *et al* 1999, Kreidl 2000, Örkény and Székelyi 2000, Redmond *et al* 2002). Indeed, analysing the two rounds of ISJP, Örkény and Székelyi (2000) demonstrate that these differences became more pronounced between 1991 and 1996. Since, as noted earlier, people in Eastern European countries do believe that meritocratic principles *should* determine income, it can be concluded that there is a significant (and growing) gap in these countries between what people perceive to be the case and what they hold to be ideal. The decline in the perception in these countries that merit determines income is difficult to reconcile with the increase in the degree of inequality held to be legitimate, as one would not expect people to accept ever greater differences of income if they at the same time become more sceptical about the way these incomes are earned.

(5) *People in Eastern Europe have come to perceive ever larger degrees of actual income inequality, while perceived income inequality has not changed much in Western Europe.*

Following the exact same pattern as beliefs about legitimate inequality, perceived income inequality was lower in East Europe in the 1980s, but higher relative to Western Europe by the end of the 1990s (Kelley and Evans 1993, Gijsberts 1999, 2002, Kelley and Zagorski

2005). Both Gijsberts (2002) and Kelley and Zagorski (2005) see a connection between these beliefs and perceptions, arguing that changes in beliefs resulted from changes in perceptions. This is consistent with the aforementioned notion that people's ideas about what 'is' influence their ideas about what 'should be'. However, as their studies are based on cross-sectional research, Kelly *et al* and Gijsberts could not ascertain the direction of causality (whether perceptions influenced beliefs or vice versa).

(6) *At the end of the 1990s, people in Eastern Europe were much more disapproving of the degree of existing income inequality than people in Western Europe.*

This is the conclusion reached by Suhrcke (2001) and Redmond *et al* (2000) from the responses to the statement 'income differences in your country are too large' in the 1999 round of the ISSP. As no study seems to have explored trends in normative judgements about existing inequality, it cannot be ascertained whether Eastern European nations have become more or less critical of actual inequality. As noted earlier, Redmond *et al* (2002) surmised that the more critical judgements of Eastern European nations could well reflect the gap between their perceptions and their beliefs. However, Suhrcke (2001) found that people in Eastern Europe still express more intolerant attitudes to existing inequality than people in Western Europe, after controlling for various determinants of such attitudes, including perceptions of the principles governing incomes. This result, in his view, demonstrates that the communist past has left a pronounced imprint on people's attitudes.

Altogether the results of the comparative East-West European studies are quite puzzling. It seems contradictory that the degree of income inequality believed to be legitimate has risen steeply in Eastern Europe while, at the same time, people in this region have become more sceptical about the extent to which existing incomes reflect meritocratic principles, and are more disapproving of the degree of existing inequality in their country than people in Western Europe. The apparent contradiction can only be explained by assuming that people in Eastern Europe had some ideal society in mind when answering the questions on legitimate incomes for a range of occupations, i.e. a society without corruption and nepotism.

In conclusion, there is on the one hand a steep increase in Eastern European countries with regard to the degree of income inequality that is believed to be legitimate. This increase is likely to be related to the change in regime, from one endorsing an ideology of egalitarianism

(communism), to one endorsing freedom and meritocracy (post-communism). On the other hand, people in this region are also more disapproving of the degree of existing inequality, and have become more sceptical as to the extent to which existing incomes reflect meritocratic principles. These attitudes appear inconsistent, but may not in fact be so. It suggests that those in the East are willing to tolerate a high degree of inequality if the reason for this is legitimate, e.g. if rewards are being disbursed according to meritocratic principles and this, the findings suggest, is not the case at the moment.

(ii) Cultural and regimes studies

A second group of comparative studies has investigated the cultural and comparative political economy regimes perspective. We distinguish between studies assessing Esping-Andersen's regimes approach (Svallfors 1997, Arts and Gelissen 2001, Luebker 2004, Green *et al* 2009, Green and Janmaat 2011), and those examining American exceptionalism (Alesina and Glaeser 2004, Osberg and Smeeding 2006)⁵. To begin with, the studies assessing regimes, Svallfors, Arts and Gelissen, and Luebker do find some support for the notion that people's views on inequality are structured by the welfare regime in operation, irrespective of the type of views they are examining (perceptions, beliefs, or judgements). Thus, relying on the same ISSP data on fair earnings as Kelley and Evans, Svallfors (1997) finds that people in the Scandinavian countries (i.e. those characterised by a social democratic regime) prefer much smaller income differences than people in the (liberal) English-speaking and (conservative) German-speaking countries.

Luebker's (2004) findings point in a similar direction. Using data from the 1999 round of the ISSP, Luebker finds that the English-speaking nations express significantly lower rates of disapproval about the degree of existing income inequality (as indicated by the proportion of respondents agreeing with the statement 'differences in income are too large') than the Scandinavian and the core EU countries. This is all the more remarkable as real income inequality is highest in the English-speaking countries (Green *et al* 2009, Green and Janmaat 2011). Finally, examining beliefs about distributive principles, Arts and Gelissen (2001) find

⁵ The only study testing the cultural and/or regimes perspective that we could not assign to either of these two groups is the one by Webener and Liebig (1995). They examine beliefs about just distributive principles in the United States and East and West Germany and explore the hypothesis that such beliefs are rooted in distinct varieties of Protestantism (Puritanism inspired by Calvinism in the US and Lutherism in Germany).

that support for the principle of equity (merit) is higher in English-speaking countries (Great Britain and Ireland) than in the countries of mainland Europe⁶.

However, somewhat inconsistent with the regimes perspective, Svallfors also found large differences within the liberal group, with the US showing the most inegalitarian, and Australia, Canada and New Zealand relatively egalitarian, views. In similar vein, Green *et al* (2009, 120 and 149) observed that, within the liberal group of countries, there were large differences among English-speaking nations in opinions on whether merit or equality should be the guiding principle in determining pay⁷. Canadians and particularly Americans preferred merit over equality in much higher numbers than the British and Irish. In fact, contrary to Arts and Gelissen's findings, the British and especially the Irish expressed relatively egalitarian views. Moreover, the differences among English-speaking nations were so large that all mainland European countries ranked between the United States and Ireland. As Arts and Gelissen and Green *et al* used different items to tap meritocratic beliefs (see footnotes 6 and 7), it can be concluded that country rankings on these beliefs appear to depend on the indicators used. This sobering finding tells us that caution is required when using a single indicator to measure a theoretical concept.

The findings from the above studies suggest that macro-level factors such as the welfare regime, the social cohesion regime and, perhaps, the prevailing political ideology may all play a role, and interact with each other, in influencing views relating to inequality.

In addition to examining aggregate levels of attitudes on inequality, Svallfors (1997) explored whether *micro-level determinants* of such attitudes would differ by regime type. He found that men, white collar workers, and retired people preferred larger income differences than women, blue collar workers, and the younger generations in all four countries of his research (Australia, Germany, Norway, and the US). In other words, the same cleavage structure applied across the board. In similar vein, Swift *et al* (1995) found beliefs about just distributive principles to be determined by the same social divides across Germany, Great

⁶ Based on the following item in the EVS 1999-2004: 'What should a society provide in order to be considered just?', 'Recognizing people on their merits'.

⁷ This is based on the following item in the EVS/WVS 1999-2004 survey: 'Imagine two secretaries, of the same age, doing practically the same job. One finds that one earns £30 a week more than the other. 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?'

Britain, and the US. Exploring differences between Eastern and Western Europe, Verwiebe and Wegener (2000) and Suhrcke (2001) also observed that attitudes on inequality in both regions are structured quite similarly. These studies thus do not support the claim that aggregate attitudes and the determinants of such attitudes differ across regimes.

The common view that Americans tolerate a high level of social inequality was mentioned earlier. Although there has been some evidence for this, the two studies we review in this section diverge in their findings. Osberg and Smeeding (2006) used ISSP 1999 data on occupational earnings to explore the attitudes of Americans, British, Canadians, French, and Norwegians. They find that Americans do not differ from the other four nations in their beliefs about legitimate pay differences. The findings are therefore not consistent with the popular thesis that Americans are unique in their views on matters of inequality and social justice. However, Osberg and Smeeding do find that the attitudes of Americans are much more polarized than those of the other nations. Interestingly, their findings on legitimate pay differences contrast sharply with those of Svallfors. This could be due to the fact that, while both authors rely on the same items on fair earnings, they used different rounds of the ISSP, and developed different indicators to measure beliefs on fair earnings⁸. The contrasting findings are another sobering reminder that cross-country patterns can vary greatly depending on the indicators used, and the time the data was collected. Drawing on World Values Survey 1999-2004 data, Alesina and Glaeser (2004) examined attitudes on the sources of poverty, which can be said to represent perceptions of the principles determining actual incomes. In contrast to Osberg and Smeeding, they do find Americans to stand out: Americans agreed in much higher numbers with the statement that people are poor 'because of laziness and lack of willpower' than those in European nations did. Whether Americans express very distinct opinions thus appears to depend on the object of the perceptions under investigation.

In summary, the review of the research on culture and regimes in this section shows the difficulty in measuring theoretical concepts, as the studies produce different results depending on the data and indicators used to tap these concepts. However, the findings of some of the studies do lend support for the hypothesis that extant conditions, including

⁸ While Svallfors (1997, p. 462) constructed an index representing the ratio of the three top to the three bottom earnings in each country, Osberg and Smeeding's (2004, p. 463) measure was simply the ratio of the maximum to the minimum earning.

welfare systems, and the institutional and attitudinal foundations of social cohesion, influence individuals' perceptions, values and judgements relating to inequality.

(iii) Micro-macro studies

The last group of studies relates to the issue of whether cross-national differences in views on inequality are the product of compositional differences (i.e. the micro perspective), or of variations in macro-level conditions (i.e. the macro perspective). The findings by Gijsberts (2002) clearly support the micro perspective. Gijsberts analysed the pooled individual-level data of 18 Western and Eastern European states using country dummy variables to assess whether countries differed significantly in beliefs of individuals about legitimate income inequality after controlling for individual background variables. She found that country differences stayed the same after controlling for social position, but were markedly reduced after controlling for perceptions of the degree of inequality (i.e. the effect of the country dummies variables was much lower). In other words, while compositional differences in social position could not explain cross-national differences in beliefs, compositional differences in perceptions could. It would appear that countries differ markedly in their aggregate perceptions of degree of inequality, and this pattern of variation is in close agreement with that of beliefs. It could be argued, however, that this finding merely shifts the problem as it begs the question as to why these perceptions differ in their aggregate across countries. Nonetheless, Verwiebe and Wegener's (2000) study provides additional support for the micro perspective. The study found Eastern European nations to have become more similar over time, in terms of the gap between perceptions of existing inequalities and beliefs about just inequalities. It also found that individual characteristics explaining these gaps grew in importance, while the influence of specific macro-level transition trajectories decreased.

The development of statistical techniques and software enabling multi-level analysis undoubtedly explains the growing number of studies assessing the impact of macro-level conditions, such as income inequality, meritocracy and ethno-racial diversity. Proceeding from Sen's (2000) idea that people share the same concept of social justice cross-nationally, and compare the existing inequality in their country to this universal benchmark. Luebker (2004), for instance, explores whether people in unequal countries have more critical judgements about existing inequalities than people in more equal countries. He does indeed find such a relationship, but only after controlling for different welfare regimes. In other

words, judgements vary considerably across regimes but, within each regime, people are more critical of inequalities the larger these inequalities are. Cross-national differences in judgements of inequality would thus seem to be a reflection of both distinct regimes and macro-level socio-economic conditions.

Hadler (2005) also focuses on judgements about existing inequalities. He tests a whole battery of micro and macro level determinants of such judgements using data of the 1999 round of the ISSP, and identifies three groups of macro-level determinants: structural characteristics (prosperity and income inequality), heritages (communist past and dominant religion), and dominant ideologies (functionalistic⁹, meritocratic, and egalitarian ideologies, and the dispersion of values on each of these ideologies). Due to limitations of the sample, Hadler could only test two determinants simultaneously. He finds that the model including functionalistic ideology and homogeneity of functionalistic values, performed best in terms of explaining the variance in judgements, which suggests that judgements are primarily shaped by ideology. However, because his study could not explore a model combining all the macro-level determinants at once, we cannot tell from the study whether the ideological and heritage conditions are more, or less, important than the structural ones in accounting for cross-country variations in the outcome of interest.

In contrast to Sen, Duru-Bellat (*forthcoming*) argues that people's conceptions of social justice *are* likely to vary across countries. She postulates that relatively unequal societies need stronger ideologies to justify these inequalities in order to retain social cohesion. A meritocratic ideology – in which the allocation of resources and rewards in society is claimed to be fair as this is carried out strictly on the basis of effort, achievement, and skills – fills this legitimating role, and can thus be expected to be strongest in the most unequal societies. Duru-Bellat's study indeed finds that both meritocratic perceptions (i.e. the view that in one's country rewards are allocated on the basis of effort and skills) and meritocratic beliefs (i.e. the conviction that education and training *ought* to determine one's income) are most prevalent in societies with the highest degrees of income inequality¹⁰.

⁹ This refers to the notion that unequal rewards are needed to motivate people to take on the more onerous work, and thus for societies to progress.

¹⁰ The authors devised a scale of meritocratic perceptions based on the ISSP items "Would you say that in your country people are rewarded for their efforts?" and "Would you say that in your country people are rewarded for their skills?". Meritocratic beliefs were tapped with the item "In deciding how much money people ought to earn, how important should be education and training?"

Other research supporting the macro perspective is the study by Kunovich and Slomczynski (2007). The authors of this study devised a measure for a society's actual meritocracy based on the degree to which income corresponds to educational attainment. Meritocratic beliefs were measured using a construct based on a battery of items in the ISSP on the criteria determining pay. Kunovich and Slomczynski found that, controlling for a number of country-level and individual-level variables, meritocratic beliefs were stronger in more meritocratic societies. This finding supports their proposition that 'the degree of actual meritocracy affects attitudes towards such a system because individuals realize that earned economic rewards are determined by merit' (p. 651). Among the other country-level variables, they found educational stock (measured as the percentage of the population with tertiary level qualifications) to be positively related to meritocratic beliefs, and prosperity (GNP per capita) and the communist legacy to be negatively related to such beliefs. The negative relation of prosperity can be said to be consistent with Duru-Bellat's hypothesis that meritocratic thinking should be more pervasive in more unequal societies. As richer countries are generally more equal than poorer ones (the United States excepting), the latter would need stronger meritocratic ideologies to justify their larger inequalities.

In summary, there is evidence that individuals do vary from country to country in terms of their beliefs on inequality; however, attributing such variations to differences in individual perceptions merely raises the further question as to why people in different cultures and systems differ in this way. This leads us back to the suggestion made in an earlier section that individuals may, among other things, be drawing on the extant norms and understandings in their environment. Whatever the case may be, there does seem to be evidence that cross-national differences in views on inequality reflect both different cultures, such as ideologies that legitimise inequality, as well as macro-level conditions, such as the actual degree of meritocracy.

Discussion

In the last section, we reviewed the studies supporting the five perspectives – viz. the modernist, the cultural, and the regimes perspectives, as well as the micro and the macro perspectives – and looked at the extent to which the findings of the reviewed studies support the five perspectives. In this section, we assess more comprehensively the explanatory power

of the five perspectives. In the process, key omissions and shortcomings of the reviewed studies will be identified.

To begin with the East-West European studies, this group of studies is particularly well suited to test the modernist and cultural perspectives. If the modernist perspective is right, we would expect Eastern European nations to have become more similar to Western ones in their views on inequality following the adoption of free market economies. In contrast, the cultural perspective would lead us to expect to find lasting differences because of the different historical experiences of the two regions.

As a whole, the pattern of results seems to provide slightly more support for the modernist perspective in comparison with the cultural one. To begin with, attitudes have changed much more dramatically in Eastern Europe relative to the West, particularly with regard to perceptions of existing inequalities, and beliefs about just inequalities. This is what the modernist perspective would expect given the profound changes in socio-economic conditions in this region. Indeed, the changes have been so dramatic that Eastern Europe has actually ‘overtaken’ Western Europe with respect to perceived inequalities, and the inequalities held to be just. By the end of the 1990s, people in Eastern Europe both saw and accepted larger inequalities than people in Western Europe. At first sight, this more recent divergence seems to be more difficult for the modernist perspective to explain. Yet, the profound attitudinal change in Eastern Europe may be understandable in view of the sudden inequalities, unusual opportunities, and new uncertainties generated by the vagaries of the transition process. Kelley and Zagorski (2005, 29) argue that, once this period of unsettledness in material conditions has passed, and market conditions have stabilized, ‘leaving fewer unusual opportunities’, views on inequality will become more similar to those in Western European countries. In this respect, it will be interesting to explore data from the 2009 module on inequalities of the ISSP to see whether their prediction has come true.

Second, people in both in Eastern and Western Europe had similar beliefs about legitimate distributive principles about legitimate earning hierarchies in the 1980s when their economic systems were still very different. At first glance, this finding does not seem to support either the cultural or modernist perspectives. However, the market economies of Western Europe and the state command economies of Eastern Europe did have some basic structural features in common: both were industrial societies with essentially similar divisions of labour, and

therefore similar work duties and status hierarchies (Kelley and Evans 1993). Moreover, pushed by the exigencies of industrialisation, the Soviet leadership soon abandoned the radical egalitarianism of the 1920s, and replaced this with their own brand of meritocratic ideology which promoted the idea that differences in income were legitimate as long as people had equal opportunities, and income was based on merit-type criteria (Mason 1995, Marshall *et al* 1999). Thus the similarities in work roles and ideologies justifying unequal rewards can explain why people in both regions shared the aforementioned beliefs despite their different systems of production and capital ownership¹¹. If we understand the modernist perspective in the broadest sense – i.e. as a claim that societies in roughly the same stage of development (agrarian, industrial, post-industrial) should exhibit the same attitudinal patterns – then the similarity of beliefs across Eastern and Western Europe is consistent with this.

Having said that, the patterns on judgements about *existing* inequalities seem to be more in line with the cultural perspective, as people in Eastern Europe were found to be considerably more disapproving of existing inequality in their societies than people in Western Europe. The finding does suggest that the experience of communism has left people in Eastern Europe with strong egalitarian preferences, despite the adoption of Western style market economies. This finding, however, is difficult to reconcile with the finding that people in Eastern Europe have come to consider ever larger degrees of income inequality to be legitimate. Unfortunately, no study has addressed these contradictory findings by examining all three types of views (perceptions, beliefs, and judgements) simultaneously, and analysing their interrelations. This is a major omission in the literature. It could be argued that the findings can be squared if people in Eastern Europe do accept large inequalities provided that society were fair, but remain very critical of existing inequalities as long as they perceive society to be very unfair. This conjecture could be tested by a study examining whether judgements of existing inequalities result from the gap between beliefs about the principles that *should* determine incomes, and perceptions of the principles that *actually* determine incomes. To our knowledge, no study has done this yet.

Another shortcoming in the East-West European studies is the under-exploitation of existing datasets regarding trends in views on inequality. Despite the inclusion of items tapping judgements about existing inequalities, beliefs about just principles determining incomes, and

¹¹ Ideally, one would need survey data going back further in time to test this properly. To our knowledge, however, views on inequality have not been tapped in Eastern Europe before the 1987 round of the ISSP.

perceptions of criteria determining actual incomes in all three rounds of the ISSP (1987, 1992 and 1999), no study has explored developments in any of these views over time. Such studies could explore whether trends in views on the magnitude of inequalities are matched by trends in views on the sources of inequality, and help shed light on the aforementioned set of contrasting findings.

The third group of studies offered mixed support for the regimes thesis. On the one hand, cross-country patterns were found on beliefs about fair income differences and fair distributive principles which matched Esping-Andersen's welfare regimes. Likewise, people's judgements on existing inequalities varied by regime type. On the other hand, there were studies examining the exact same beliefs (but relying on different data sources and indicators) which did not find country differences corresponding to the regime traditions assumed to characterise (groups of) West European countries. Moreover, views on inequality appeared to be structured quite similarly across a variety of countries in terms of the determinants of such views. Given the contrasting findings yielded by different items, different data sources and different indicators, it is advisable that future research testing the regimes thesis makes maximum use of triangulation. Only if the same cross-country pattern emerges irrespective of the data, items, and indicators used can one be reasonably sure about the robustness of the findings. Of course, the suggestion of triangulation is relevant to practically all research relying on survey data.

To take stock of what has been said so far, the findings of the East-West European and regimes studies permit only a partial testing of the modernist, cultural, and regimes perspectives. For a more thorough assessment of the three perspectives, a study would have to have a wide selection of countries, including both developed and developing ones. Only such a study can explore whether countries with similar economies have more in common in terms of these views than countries with different economies. If such research were to find that views on inequality broadly coincided with a country's economy, then the modernist thesis would be supported. If, by contrast, it found that countries had very different and stable views on inequality irrespective of the state and nature of their economy, then the cultural thesis would have more explanatory power. And if it found countries in a similar stage of socio-economic development to have broadly the same views, but to yield differences corresponding to regimes upon more detailed scrutiny, then the regimes perspective would be endorsed. In sum, only a study with a broad selection of countries can combine the global

vantage point of the modernist and cultural approaches with the regional perspective of the regimes approach, and assess how within-group differences relate to between-group differences (with groups defined in terms of stage of socio-economic development). Remarkably, *none* of the reviewed studies has such a selection of countries *despite* the availability of relevant public opinion data with world-wide coverage, such as that of the World Values Survey. This is a key omission in the literature.

More work can also be done to test whether cross-national variation in views on inequalities are due mainly to compositional differences or macro-level conditions. The latter can be said to be influential if they exert an independent effect on views on inequality irrespective of the effect of their micro-level counterparts. For instance, if the class structure of a society shows a significant relationship with views on inequality controlling for individual differences in occupational status, then it can be seen as a genuine macro-level determinant. If it is not related to these views once individual occupational status is accounted for, then it is a spurious effect reflecting nothing more than the sum of its parts. Over time research of the type conducted by Verwiebe and Wegener (2000) would seem to be particularly relevant to test whether micro- or macro-level conditions are becoming more important determinants of views on inequality as there are good reasons to postulate a decrease in the importance of macro-level factors (and therefore a concomitant increase in the explanatory power of individual-level conditions). First, because Eastern European countries have introduced liberal democracy and a free market economy, they have become much more similar to Western European countries in socio-economic and political terms; it can therefore be expected that the role that societal conditions play in accounting for East-West differences in views on inequality has diminished. Second, some would argue that global economic integration undermines the social cohesion of nation states by producing more inequality of income and opportunities within societies. In this view, such a situation will lead to ever smaller differences *between* countries, by comparison to differences *within* countries, in public opinion and political preferences (Lawrence 1997, Dalton 2004)¹². The 2009 round of the ISSP on social inequality, and the 2010 wave of the World Values Survey, give researchers excellent opportunities to investigate these propositions, as the data from these surveys can be compared to earlier rounds.

¹² Others however would argue that globalization does not necessarily lead to a cultural convergence across countries because countries are integrated in the world economy in different ways, resulting in different experiences with and reactions to globalization (Held and McCrew, 2002).

In addition, studies investigating macro-level conditions could explore the extent to which views on inequality are shaped by distinct cultures, or by macro-level properties of a continuous kind. This will be a challenging task as the variation in the latter will often run parallel to variation in the former. For instance, income inequality is relatively high in countries said to have a meritocratic culture, while it is low in countries espousing an egalitarian culture. However, disentangling the impact of these two different conditions is vital, as it gives us clues as to the manipulability of views on inequality. If such views respond in a linear fashion to changes in macro-level socio-structural conditions, then these are amenable to change by reforms seeking greater social justice. If, by contrast, they are deeply rooted in distinct and lasting cultures, it would seem impossible to change them through public policy.

To summarise, the relationships between the cognitive elements of inequality and the factors influencing them are very difficult to establish: while some studies have found links between beliefs about fair income differences and welfare regimes, others have failed to do so. However, it can be said some cognitive components relating to inequality are more responsive to certain factors than others. For instance, judgements about existing inequalities seem to be more a reflection of distinct ideologies, whereas beliefs about legitimate distribution principles conform more to the modernist imperative.

At the same time, there are gaps in the research. While not all of these can be addressed by the current Perceptions of Inequalities project, the project will deal with several important omissions in the existing literature, as the concluding section will explain.

Section Four: The Effect of the Cognitive Elements of Inequality on Important Social Outcomes

In comparison with the number of studies investigating the cognitive elements of inequality as dependent variables, there are few studies examining the wider social consequences of the cognitive elements of inequality. This is surprising for two reasons. First, if it is unclear whether these cognitive elements have any social effects, observers may legitimately ask why they should deserve our attention at all. In other words, it raises the ‘So what?’ question

(Kluegel *et al* 1995a, 7). This question is particularly relevant with regard to objective inequality. If the cognitive elements of inequality were not found to have an independent effect on social outcomes (i.e. an effect complementary to that of objective inequality), a case could be made for ignoring these altogether. Second, a link can theoretically be postulated between the cognitive elements of inequality and important social outcomes such as participation, tolerance, and social solidarity. If people prefer large inequalities, and judge existing inequality to be fair, they do not have an incentive to mobilize politically in an effort to change the situation for the better (i.e. we can expect their participation levels to be low) (Furnham 2003). People are also likely to hold negative views of the poor and other disadvantaged groups because of their conviction that these groups 'get what they deserve' (Lerner 1980). This, in turn, is likely to diminish their support for social welfare programmes benefitting these groups.

Nonetheless, several studies have investigated the social effects of the cognitive elements of inequalities. We can identify two groups of studies. The first group comprises several studies from the 'Belief in a Just World' (BJW) literature analysing these effects within countries. This literature is relevant as people who believe in a just world must also believe that the distributions of income and wealth, and the social and political institutions perpetuating these, are just and should be maintained (Dittmar and Dickinson 1993). The second group consists of several studies examining the consequences of the cognitive elements of inequality cross-nationally. Only this, second group could investigate whether these cognitive elements have an impact in addition to that of macro-level conditions such as real income inequality.

The first group of studies have indeed found that people who believe in a just world display lower rates of political and social activism, and lower levels of tolerance and understanding towards disadvantaged ethno-racial groups, than people with more sceptical views (Rubin and Peplau 1973, 1975, Dalbert and Yamauchi 1994). On the other hand, a belief in a just world has also been associated with higher levels of both interpersonal and institutional trust (Fink and Guttenplan 1975), with more life satisfaction and well-being (Lipkus *et al* 1996), and lower stress levels and higher achievement motivation (Tomaka and Blascovich 1994). These associations make sense theoretically. If people believe that the world is just and fair, they are also likely to believe that fellow citizens are trustworthy, and that they can improve their own fate, and their efforts are rewarded. In other words, the belief in a just world is a strategy to cope with the insecurity and unpredictability of the real world (Dzuka and Dalbert

2000). Belief in a just world is thus related in different ways to various social cohesion and competitiveness outcomes. It would be interesting to see whether the cognitive elements of inequality are related in the same way to these outcomes as the belief in a just world.

Only a handful of studies have examined the social effects of the cognitive elements of inequality cross-nationally. Investigating social justice beliefs in eight post-communist countries in the early 1990s, Mason (1995) found that people endorsing socialist principles of distribution were less politically active, and less trustful of government, than people committed to market-oriented reforms. In a sense this finding is surprising as one would expect the former to have a stronger incentive to mobilize politically and demand social reforms. Possibly, feelings of powerlessness and alienation supersede the motivation to change things for the better among the people endorsing socialist principles, resulting in less rather than more participation. If we assume regime legitimacy to be intimately related with political trust, Gijsberts' findings are in agreement with those of Mason. Focussing, as Mason does, on public opinion in transition countries, Gijsbert finds that (1999, 104):

People who support egalitarian distribution principles ... show a tendency to legitimize the old state-socialist system and seem to take a wait-and-see stand with regard to the new market economy. People who support the new meritocratic ideology ... tend to embrace the new free-market order.

Interestingly, she also finds relationships between values regarding distributive principles and voting behaviour to be much more volatile in Eastern Europe in comparison with Western Europe. While the relationship between support for the principle of merit, and voting for right wing parties, remained stable in the old market economies, in the transition states support for meritocratic distribution principles was first unrelated, and subsequently (in the mid 1990s) strongly related, to right-wing voting. Gijsberts' research thus suggests that major changes in the political and economic order strongly influence the links between the cognitive elements of inequality and political behaviour.

Investigating the effect of values regarding distributive principles on opinions about income policies in five countries, Kluegel and Miyano (1995) found that people who believe that need and equality are important distributive principles are much more in favour of the government providing a guaranteed minimum income, than people stressing merit and hard work. They found this effect to be markedly stronger in the United States and Great Britain,

as compared to Germany, Japan, and the Netherlands. This led the researchers to surmise that the inclusiveness of the welfare state in the last-named countries dampens the effects of individual differences in social position and value preferences. Yet, because of the limited number of countries in their study, Kluegel and Miyano could not explore the effect of welfare inclusiveness or other macro conditions in more detail.

To our knowledge, only Luebker (2007) has controlled for actual income inequality in his study on the link between views on inequality and support for redistribution. Using aggregate data, he found that the percentage of people who considered income differences to be too large showed a strong positive relation with aggregate support for redistribution, irrespective of the level of income inequality. These findings refute the assumption that public support for redistribution will automatically rise when income inequality increases. They further show that there is every reason to assume the cognitive elements of inequality to have social effects complementary to that of real inequality, thus justifying attempts to explore these effects.

Hence, it was found that belief in a just world is associated with positive social outcomes like institutional trust, and life satisfaction and well-being. At the same time, changes in the prevailing economic and political order – and associated ideology – suggests links between the cognitive elements of inequality and political behaviour. In addition, certain beliefs – such as the belief in need and equality as important distributive principles – were associated political preferences, such support for redistribution. Having said that, there have on the whole been very few studies of the consequences of the cognitive elements of inequality on important social outcomes. One of the main aims of our Inequalities project is to explore these cognitive elements in young people, and the possible impact on the motivation and nature of active citizenship.

Section Five: Conclusion – Omissions in the Literature

In this literature review, we clarified the concepts and terms used in the Perceptions of Inequalities project, and examined the different types of theories explaining differences in perceptions, values, and judgements relating to inequality, as well as how individuals respond to these.

There has been much research on different forms of inequality and social outcomes. Income equality is associated, among other things, with social and political trust, lower levels of violent crime, even better health and life expectancy, as well as higher levels of social cohesion. Educational equality is associated with higher levels of social cohesion as well. There is also a body of work studying the psychological and social mechanisms on the perceptions of inequalities, the ways in which individuals cope with or manage these, as well as the effects on social attitudes and behaviours. However, there has been much less research on the *perceptions* of inequalities, and their effect on civic participation, as well as the psychological and social mechanisms that link the two.

We also reviewed empirical research on the cognitive elements of inequality, and the social outcomes associated with these. We identified several important omissions and shortcomings in this literature. One shortcoming is that none of the studies has attempted to explain views on inequality comprehensively, viz. by examining all the cognitive elements, and relating these to the two dimensions of inequality. Such a study could shed much more light on how these cognitive elements and dimensions are interrelated, as well as on the relevant societal conditions that can explain cross-national variations in these interrelations.

Another shortcoming is the under-exploitation of existing datasets regarding trends in views on inequality. Despite the inclusion of items tapping judgements about existing inequalities, beliefs about just principles determining incomes, and perceptions of criteria determining actual incomes in all three rounds of the ISSP (1987, 1992 and 1999), no study has explored developments in any of these views over time. Such studies could explore whether trends in views on the magnitude of inequalities are matched by trends in views on the sources of inequality, and help shed light on the contrasting findings of some of the reviewed studies.

Third, we were surprised by the relative paucity of studies examining the social effects of cognitive elements of inequality. In particular, cross-national comparative studies exploring these effects were found to be in short supply. The relative lack of interest in this area is difficult to understand as it leaves the question about the social relevance of cognitive elements unanswered. If these cognitive elements do not have an independent effect on important social outcomes, i.e. an effect in addition to that of other micro and macro-level conditions, then it can legitimately be asked why they should be studied at all. If they do have such an effect, they deserve our fullest attention.

Fourth, there is a marked lack of studies examining the role that education in all its facets plays in shaping these cognitive elements. Since almost all research has focussed on adults, we know next to nothing about how personal educational experiences and school conditions influence the formation of such representations among young people. In particular, research on the link between personal experiences of unequal or unjust treatment, and opinions on societal inequality is almost non-existent, as is research examining the relation between opinions on socio-economic inequality and attitudes on ethnic and gender inequality.

The Perceptions of Inequalities project will address these four omissions. Its main body consists of a study among young people in a variety of educational settings in different countries. This study was conducted in 2009 and 2011, and entailed the collection of qualitative and quantitative data among teachers and students in lower secondary, upper secondary, and higher education in Denmark, England, France, Germany, and Singapore. Schools in lower and upper secondary were selected to represent differences in ethnic composition and academic status. The questionnaires were framed in ways that allow us to explore how the cognitive elements of inequality are related to important outcomes, such as participation, trust, and tolerance.

At the same time, the focus groups and interviews further enabled us to examine how individual experiences, school contextual conditions, and societal characteristics shape these cognitive elements.

Where there were experiences of social or educational inequality, we sought to understand what perceptions young people had of this, how they understood it, and what attitudes they formed as a result. We also sought to understand the psychological coping mechanisms they used with regard to the individuals, circumstances or institutions they held responsible, or the psychological adjustments made as a result of their experiences. Did they see those situations as being unequal or unjust? And what impact did their experiences have on their sense of personal agency and, through this, their social attitudes and future civic participation?

The literature refers to prevailing social or political conditions that may affect the life experiences of individuals. We will take these into consideration. However, as the people in our study are young people, the bulk of their formative experiences would take place in the

context of family and friends, and these may be significant as well, if not more so. Furthermore, there is also the question as to the norms on which young people draw, not only to explain the inequalities they experience, but also to underpin the attitudes they develop to others and to civic participation.

In addition to analysing the quantitative and qualitative data, the project aims to analyse the data of the International Citizenship and Civic Education Study (ICCES), and all the rounds of the ISSP, to explore changes over time and assess the degree of agreement between the attitudes of young people and those of adults. This may give us clues as to the stability of attitudes on inequality.

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Appendix: Research Methodology

The main part of the Perceptions of Inequalities research project will involve the collection of new data on student attitudes and values. The LLAKES team will conduct the research in five countries – Denmark, England, France, Germany, and Singapore - which have been selected to represent a range of lifelong learning and knowledge society models. In each country, we will select at least three lower secondary schools, two upper secondary schools, and one higher education institution. The lower secondary schools will be selected on the basis of their ethnic mix, and the upper secondary schools will be drawn from the academic oriented and the vocational oriented tracks. We will administer approximately 60 questionnaires with three learner groups in the lower secondary schools (focussing on students aged 14-15), and 100 questionnaires with three learner groups in the upper secondary schools (focussing on students aged 16-18). The aim would be to elicit information with respect to the relationship between student background characteristics, learning environment, perceptions of inequalities, and social and civic attitudes. The questionnaire will involve items designed to measure levels of student stress, status anxiety, cooperativeness, and trust. We will use the results of the questionnaire as a sampling frame for selecting respondents for the interviews. In each lower secondary school, we will conduct a minimum of one focus group and one teacher interview. In each upper secondary school, we will conduct a minimum of three student and one teacher interviews. Interviews will be semi-structured, and will probe more deeply into individual understanding of the relationships between perceptions of inequalities and social and civic attitudes. These will be conducted in the language of instruction at the institution by native speakers, and recorded and transcribed and, where not in English, also translated.

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