

DISTRIBUTIVE JUSTICE PREFERENCES AND CULTURAL FACTORS IN ROMANIA

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Abstract: *The paper presents directions to investigate distributive justice preferences in Romania, at national and regional level. Based on previous findings, it was hypothesized that belonging to one of the six major cultural-historical Romanian regions (Moldavia, Transylvania, Wallachia, Banat, Dobruja, Oltenia) may affect the preference for a fairness principle. The expectation is that people from Western Romania will prefer to a greater extent an equity-based allocation model, while people from Southern and Eastern parts of the country will prefer a distribution pattern with equality as a stronger predictor. A factorial survey design to investigate distributive justice in Romania is presented and discussed.*

Key words: *distributive justice, factorial survey, norms.*

1. Introduction

Given the importance of distributive justice for both social policy and organizations, this topic has gained a central place in social sciences research. Scholars were interested in giving answers to questions regarding: (1) the distribution norms perceived as fair; (2) the moderating conditions that determine the choice of one or more allocation norms, and (3) the role of culture as determinant of preferred norms.

Early research pointed out the existence of several distribution norms, such as equity, equality, need, justified self-interest, adhering to commitments, legality, the Darwinian rule, ownership [5], [16]. Moreover, Reis [23] identified seventeen rules derived from the social sciences and from legal, historical, and philosophical sources.

In addition to inquiry into distribution norms, a large part of the theoretical and empirical research has been focused on the moderating conditions that determine or are associated with the choice of a certain distribution rule [3], [19]. Early delimitations were made by Deutsch [5] who stated that the goal of the distribution and the type of relation determine specific allocation patterns. Thus, in collaborative relationships, if the goal is economic productivity, then equity will be the dominant principle; if the goal is maintaining enjoyable social relations, then equality will be the dominant principle; and if the goal is personal welfare, then the need will be the dominant principle.

Mikula [19] pointed out two categories of factors affecting the allocation decision: (1) characteristics of the allocator (e.g.,

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individuals or groups, participant or non-participant in the production of goods to be distributed, allocator is or is not a co-recipient), and (2) situational characteristics (e.g., social system, the nature of goods to be allocated). Based on review of theoretical research and empirical evidence, Törnblom [27] presented a comprehensive taxonomy of moderating factors, with six categories:

1. characteristics of the actor (e.g., sex, age, occupation, personality);
2. characteristics of the contribution (e.g., size of the contribution, positive or negative valence, generated independently or collective, with internal or external causal attribution of inputs);
3. characteristics of the social relationship (e.g., cooperative or competitive, with future interaction or without future interaction);
4. characteristics of the social, cultural and historical context (cross-cultural research);
5. characteristics of the outcome (e.g., the quantity of the outcome: scarcity or abundant);
6. characteristics of the outcome allocation (e.g., harmony, performance or responsibility for others, negative or positive outcomes, public or private allocation).

A special emphasis within the literature has been on the fourth category of the Törnblom [27] taxonomy: national, cultural, and historical differences. Cultural variation in reward-allocation pattern has been asserted from the beginning of the distributive-justice research, rooted in Adams's [1] statement about "historically and culturally" determined equity. Since then, a lot of effort has been invested in identifying cultural and national differences in reward-distribution norms – meta-analysis in [10]. Although the distributive justice is a

widely researched topic, little is known about Eastern Europeans reward allocation preferences. Meta-analysis by Fischer and Smith [10] shows that the research on allocation norms has been conducted mainly in the US and Asian countries.

This paper presents direction for distributive justice research in Romania, a post-communist East-European country. Since cultural differences shape the distributive-justice decisions, it can be argued that a cultural factor (as belonging to a particular Romanian cultural region) could determine differences in preferences for a distribution norm. Thus, it can be hypothesized that belonging to one of the six major cultural–historical Romanian regions (Moldavia, Transylvania, Wallachia, Banat, Dobruja, Oltenia) may affect the preference for a fairness principle. This hypothesis is grounded on an emic-etic perspective of justice [26], which incorporates the assumption that fairness judgments are dependent on history, and are rooted in social, political, economic, and religious features.

The second focus of the paper is on methods that could be employed to measure Romanians preference for a distribution rule, at national and regional level. A research design is presented and discussed.

2. Cultural variation in distribution norms

The Individualism – Collectivism dimension [13] has been often used to explain why respondents from Individualist nations are more likely to prefer the equity norm and respondents from Collectivist nations the equality norm [10].

Consistent with Hofstede's estimations [14], a Romanian Gallup poll conducted in 2005 [17] shows that Romania is a Collectivistic country, with moderate Femininity and high Uncertainty

Avoidance. Differences were registered between the two studies on the Power Distance dimension: Hofstede estimated a high score (Power Distance Index = 90), while the Gallup study shows a low score (Power Distance Index = 33). The Gallup researchers considered this gap in terms of an “authority complex,” defined as a gap between actual and desired behaviour. They concluded that the Romanian Power Distance Index is in fact higher than the poll registered.

Another Romanian study based on Hofstede’s cultural model [18] confirmed the low Individualism in the Romanian population. It was also found a very high level of Power Distance and a medium rank of Masculinity (rather masculinity than femininity).

Three arguments to explore regional preferences for distribution rules in Romania are presented below. Firstly, although the communist ideology emphasized cultural uniformity [28], the differences between historical regions of Romania have been extensively documented in Romanian academic literature and recently, in English-language papers [2], [4], [21]. It has been shown that differences between the regional cultural identities are firstly rooted in historical and current political, religious, and economic factors (e.g. the historical Ottoman domination in Dobruja, the Habsburg domination in Transylvania, the Catholic Swabians population brought into the Banat by the Habsburgs, etc.).

Secondly, these regional cultural identities, constituents of the Romanian national identity, are visible in folk and lay theories about Romanian identities, including stereotypes and anecdotes. As Boia [4:221] states, “The Wallachians are considered to be lively, the Transylvanians slow moving, the Moldavians contemplative. [...] Oltenia is the most rural part of Romania, and preserves a

distinct individuality. Along with the Banat and Bukovina [the northern part of Moldavia], Transylvania is considered to be the most civilized part of the country – the result of German influence, in contrast to the Balkan and Turkish influences on the other side of the mountains!”

Thirdly, previous research based on Hofstede’s methodology [17], [18], [21] has found differences between historical provinces for all cultural dimensions. For instance, as Neculăesei and Tătărușanu [21] have shown, Moldavians have higher Power Distance and Masculinity, Transylvanians higher Uncertainty Avoidance and slightly higher Individualism. Some mixed results were found by the Gallup study [17]. A higher level for Individualism was registered in Banat compared with Transylvania. An unexpected result showed that Transylvanian respondents scored lower at Individualism compared with Moldavian respondents.

The six Romanian cultural identities could be considered both salient and ascribed; in other words, people are born into prescribed local norms and values, giving them little space for choice [22]. Following this assumption, it can be expected that regional differences in preferences for distribution norms might be registered. The expectation is that people for Western Romanian (Transylvania and Banat) will prefer to a greater extent an equity-based allocation model, while people from Southern and Eastern parts of the country (Walachia and Moldavia) will prefer a distribution pattern with equality as a stronger predictor.

3. Measuring preferences for distribution norms

Traditionally, preferences for a distribution norm have been measured by scenario and role-playing approaches [7], [11]. Criticizing the verbal scenarios used

by these authors for the artificial behaviour presented in them and their lack of mundane realism, however, other authors have used questionnaires [9], [12].

Although a large number of distribution norms had been highlighted, only three had received the full attention of the researchers: equity, equality, and need. More recently, seniority norm, as a fourth distribution principle, has been investigated [9], [25].

Equity or proportionality norm is based on Adams' equity theory [1]. The theory states that a person evaluates the ratio between his/her contributions and reward, compared with the input-outcome ratio of a referent person or group. If inequality occurs (inequity), person making the comparison is motivated to restore the balance, applying different strategies. According to this theoretical model, a fair distribution of resources has to be done proportional with individual contribution or input.

In role-playing or scenario approach, the contribution has been frequently operationalised as work performance or productivity [7], [29]. However, Fischer [9] proposed a different approach to measure preference for equity and used questionnaires with items phrased as general standards of performance.

Need-based model states that the fair distribution of resources has to be done according to individuals or group needs. Need was operationalised as financial difficulties and illness in the family [20], as ratio of salaries to dependents [11] or as a large family to support [6].

Finally, according to the equality-based model, the just allocation of resources is one without differences between recipients. Equal allocation of rewards has been measured as equal amount of money allocated to recipients [11] or as general statements regarding the equality of treatment [9].

Although the experimental design employed to measure the preference for a distribution role has multiple advantages, only few variables might be manipulated. Furthermore, the risk to create artificial measurement condition is difficult to be managed. On the other hand, the survey has disadvantages related to the high correlation between variables, which generates low internal validity. Factorial survey (FS), a methodological approach proposed by P. H. Rossi [24], aims to overcome the limitations of experiment and survey. Following, a FS research design to measure distributive justice judgments is suggested.

4. Factorial survey method – a research design

Factorial survey [15] is a quasi-experimental method designed to measure social components of judgments. The method has been applied to a range of topics, from criminal justice to childcare and professional judgements (for a review of FS studies, see [29]). In brief, FS requires respondents to evaluate sample of vignettes (hypothetical situations) in which different factors are orthogonally varied. FS design seeks to maximize the external and internal validity of measurement, by bringing together the orthogonality from the experiment design and the realism and complexity from the survey design [29]. Details on factorial survey are presented by the pioneers of this method [24] and recently by Jasso [15] who developed a unified methodological framework.

The factorial survey design has seven components: (1) dimensions, (2) levels, (3) vignettes, (4) rating task, (5) vignette universe, (6) vignette sample, and (7) respondent sample. Dimensions are the independent variables or input factors believed to influence the judgment. The

input factors are selected based on literature review and day-to-day wisdom [15].

The levels are the specific values that each dimension may take. For instance, to measure preference for an allocation norm, several dimensions might be selected: contribution, need, work experience, and historical region. In Table 1 are presented the possible levels for each dimension and the corresponding words to be used in vignettes' text.

Specific to factorial survey, vignette is

the unit being judged by respondents, and the basic unit of analysis. A vignette text with levels in square brackets is presented in Table 2, alongside with the rating task (which generates the dependent variable). Each vignette contains a unique combination of levels. Using the experimental design to generate vignettes, the intercorrelation between the independent variables is significantly reduced. Using real-life situation for vignettes text, the realism of survey is added to the research design.

Dimensions, Levels, and Wording

Table 1

Dimensions and levels	Wording
1. Contribution a. High b. Average c. Low	a. wrote 15% of the volume b. wrote 35% of the volume c. wrote 55% of the volume
2. Need a. High b. Average c. Low	a. the parents are not working and the family may not provide college expenses b. only one parent is working and the family may provide, with some effort, college expenses c. both parents are working and the family may easily provide college expenses
3. Work experience a. High b. Low	a. participated in other similar projects b. did not participate in other similar projects
4. Historical region a. Moldavia b. Transylvania c. Wallachia d. Banat e. Oltenia f. Dobruja	a. was born in Iasi and is proud to be a native of Moldavia b. was born in Cluj and is proud to be a native of Transylvania c. was born in Târgoviște and is proud to be a native of Wallachia d. was born in Timișoara and is proud to be a native of Banat e. was born in Craiova and is proud to be a native of Oltenia f. was born in Constanța and is proud to be a native of Dobruja

Vignette universe consists in full population of unique vignettes obtained by generating all possible combinations of levels (i.e. the Cartesian product of levels).

In the presented example, the vignettes universe has $3 \times 3 \times 3 \times 8 = 648$ unique vignettes. In order to select the vignettes

sample (i.e., sets of vignettes rated by each respondent) a random of quota procedure might be used [8]. As Jasso suggested [15] a deck of 20 to 60 vignettes is considered large enough to estimate individuals regression equation (i.e., the equation inside-the-head for each respondent).

Wallander [29] has shown that the common strategies for modelling judgments in factorial survey were based on Ordinary Least Square (OLS) regression. Few studies have used hierarchical linear model (HLM). Specific to FS design, in the first step of the analysis respondents are considered

interchangeable (i.e., their judgments might be described by the same regression equation), the vignette being the unit of analysis. In the second step, analyses on respondents' judgments schemes or respondents' consensus on the importance of each factor, might be conducted.

Vignette, Instructions for Respondents, and Rating Task

Table 2

<p><u>Instructions for respondents</u></p> <p>This package contains several descriptions of students who are in a position to divide a sum of money obtained together. We would like to know how you think they should split the money. You can choose any amount between 0 and 6,000 Euros.</p> <p>You may change the answer, even if you have already completed it.</p> <p>Your responses are confidential.</p> <p><i>Three students wrote a volume of novellas and short stories and participated in an international competition dedicated to young writers. Students got the second prize and 6,000 Euros from the organizing committee. They need to share the amount of money and consider several things.</i></p> <p>Vignette</p> <p>This student [wrote 35% of the volume]. [Only one of his/her parents is working and the family may provide, with some effort, the college expenses]. He/She [participated in other similar projects]. He/She was born in [Iasi and is proud to be a native of Moldavia].</p> <p><u>Rating task</u></p> <p>What is the amount of money that you think you should receive this author? _____</p> <p>You may choose any number between 0 and 6000.</p> <p>You may use any real number, with decimals or fractions if you want.</p>

5. Conclusion

The paper aimed to present arguments for exploring distributive justice norms in Romania, both at national and regional levels. As previous research has shown, there were registered regional differences regarding the cultural values of Romanians. It was hypothesized that differences will be indentified in preferences for a specific distribution norm, in the direction of a stronger importance of contribution in Western parts of the Romania, compared with the stronger importance of equality in the Southern regions.

To investigate preferences for specific allocation norm, factorial survey method, a quasi-experimental approach has been proposed.

Large surveys (e.g., World Values Survey; European Values Study) and social-anthropological research have shown that Romanians' fairness values have a unique core. At the same time, these studies pointed out that some Romanians fairness attitudes are similar to those of other Eastern European and Balkan peoples. For example, the World Values Survey shows that Romanians' attitudes towards income equality are similar to those of Bulgarians, Serbians, Macedonians, Albanians,

Slovenians, Greeks, Croatians, Russians, and Turks. Therefore, based on the suggestions presented in this paper, future research could usefully explore both particular and common fairness judgments in Eastern Europe.

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