

Subjective evaluation of income (un)fairness: Contrasting principles of justice?

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Abstract

This study examines the extent to which individuals' adherence to various principles of justice leads them to evaluate their income as (un)fair. We analyse individuals' evaluations of income (un)fairness in relation to their own subjective social position, based on their declared identification with a vignette representing a given social stratum, paying special attention to the predominant evaluation of unfairness. Based on an overview of various principles of justice, we analyse responses to an open question in order to establish whether adherence to any of these principles is associated with that subjective assessment. We compare this with the influence of the individuals' socio-economic characteristics relative to their objective social position. We use qualitative and quantitative data from a survey applied in 2024 to a statistically representative sample of 562 employed individuals from the province of Palena in Chile, selected randomly by district, household and individual. Results show that the principle of meritocracy based on education and entrepreneurship tends to be used to justify income inequality, while the opposite occurs with merit based on effort at work and the principle of need. However, some respondents' socio-economic characteristics – in particular, having lower levels of income or education – are also associated with the likelihood that they will rate their income as unfair.

Keywords: social inequality; social justice; distributive justice; social positions

Resumen. *Evaluación subjetiva de la (in)justicia de los ingresos: ¿principios de justicia contrapuestos?*

Este estudio examina en qué medida la adhesión de los individuos a diversos principios de justicia influye en la evaluación de sus ingresos como (in)justos. Analizamos las evaluaciones de los individuos acerca de la (in)justicia de los ingresos en relación con su propia posición social subjetiva, basándonos en su identificación declarada con una viñeta que representa un estrato social determinado y prestando especial atención a la predominante evaluación de injusticia. A partir de una visión general de diversos principios de justicia, analizamos las respuestas a una pregunta abierta para establecer si la adhesión a alguno de estos principios está asociada a esa evaluación subjetiva. Comparamos esto con la influencia de características socioeconómicas de los individuos en relación con su posición social objetiva. Utilizamos datos cualitativos y cuantitativos de una encuesta realizada en 2024 a una muestra estadísticamente representativa de 562 individuos empleados de la provincia de Palena en Chile, seleccionados aleatoriamente a escala de comuna, hogar e individuo. Los resultados muestran que el principio meritocrático basado en la educación y en el espíritu emprendedor tiende a utilizarse para justificar las desigualdades de ingresos, mientras que lo contrario ocurre con el mérito basado en el esfuerzo en el trabajo y el principio de necesidad. Sin embargo, las características socioeconómicas de algunos encuestados —en particular, los que tienen niveles más bajos de ingresos o educación— también se asocian con la probabilidad de que evalúen sus ingresos como injustos.

Palabras clave: desigualdad social; justicia social; justicia distributiva; posiciones sociales

Abstract

	Introduction	4. Income (un)fairness, principles of justice, and objective social position
1. Subjective evaluation of income (un)fairness		5. Conclusion
2. Method		Bibliographical references
3. Results		

Introduction

The subjective evaluation of social justice is important, and of income justice especially so. When inequalities are viewed as injustices, the people affected are profoundly involved, and the consequences tend to include socio-political repercussions. International surveys conducted in many countries, including in Chile and elsewhere in Latin America, reveal that a large majority of people believe there is unfairness in income levels.

At the same time, equality of opportunity, and in particular the principle of meritocracy based on educational and other achievements, has received special attention in recent decades, with questions raised as to whether it operates in a truly equitable manner, especially for those in the lower strata of society (Evans et al, 2010; Littler, 2018). However, it is unclear whether this, along with the subjective evaluation of income injustice, implies a preference for other principles, including the non-meritocratic.

Thus, the objective of this article is to examine the extent to which individuals' adherence to a given principle of justice influences their evaluation of their income as (un)fair. We analyse individuals' perceptions of the (un)fairness of their income, paying particular attention to evaluations of unfairness – a judgement derived from their own subjective social position rather than from opinions concerning income distribution in general.

Based on a theoretical and conceptual overview of various principles of justice, we examine whether, within people's evaluations of income fairness, a preference for certain principles generates shared patterns that differ from those engendered by other normative preferences. We analyse the reasons given for this evaluation by the individuals themselves, thereby situating the principles to which they refer – that is, the normative ideas that they believe should underlie the income they receive and be the basis of differences between their income and those of others.

We also examine the extent to which subjective evaluations of income depend on individuals' socio-economic characteristics relative to their objective social position, as opposed to their preferences in terms of principles of justice.

We address the effect of these principles on evaluations of income (un)fairness empirically, focusing on a specific case and contributing to broader reflection on the subject. The data are taken from a survey applied in 2024 to a statistically representative sample of employed individuals in the relatively isolated province of Palena in southern Chile.

In the first part of the article, we offer a formal account of the subjective evaluation of income justice, the variants of the meritocratic principle, the relevance of the principle of need, and the approaches taken to the role of objective social position to date. In the second part, we present the methodology that we have designed to measure fair income, to examine individuals' notions of fairness, and to analyse the results. In the third part, we present the results of the subjective evaluations of income according to the different principles applied by individuals, and we compare them with associations with the respondents' socio-economic characteristics.

1. Subjective evaluation of income (un)fairness

The concept of social justice covers multiple domains. From the subjective point of view of individuals, distributive justice is of particular significance and relates to their perception of what they receive, the principles or notions that determine how much they think they should receive, and their evaluation of the difference between the two (Jasso, 2015; Jasso et al., 2016; Liebig & Sauer, 2016). These processes are central to the theory of social justice and a crucial part of any empirical work that seeks to contribute to theoretical and conceptual reflection.

The perception of income received and how much it differs from the incomes of others is bound up with other dimensions of inequality such as gender, education, race and ethnicity, occupation and assets. These dimensions are

particularly marked in Chile and across Latin America, dictating the social position of individuals in relation to other groups from which they also differentiate themselves symbolically (Atria, 2021; Guibet, 2012; Quijano, 2014; Lamont & Molnár, 2002; Viveros-Vigolla, 2016). Thus, in the present article we assume that individuals evaluate differences in income by referring to the level of income that is associated with the social position that they consider themselves to share with others and which they perceive as distinct from other positions. Our research is based on the premise that the income of the social position with which a group of individuals identifies, combined with characteristics of that position in terms of the various dimensions of inequality and their differences compared to other positions, are aspects that are largely shared and known by that group. By focusing on the level of income typical of the individual's social position, this paper falls within a current of research that addresses the influence of various principles of justice on the subjective evaluation of income fairness, rather than on perceptions of differences in income (Janmaat, 2013).

The subjective evaluation of income fairness – theoretically a consequence of the difference between actual income and applied principles of justice – is empirically unbalanced. According to data from the Latinobarómetro Survey, an overwhelming majority of people in Chile and 17 other Latin American countries consider income distribution to be unfair or very unfair (García-Sánchez et al., 2022; Reyes & Gasparini, 2022). This opinion is expressed to a similar degree in other countries, according to the International Social Survey Programme (García-Sánchez et al., 2022; Moya et al., 2023; Reyes & Gasparini, 2022). From a pragmatic sociology perspective, this means that we must focus on the sense of unfairness expressed by individuals themselves in order to understand how criticism of unfairness can or does arise (Boltanski, 2011).

When the unfairness that individuals express refers to their own income, their reasoning extends beyond the cognitive, with experiences, intuitions and emotions converging with greater intensity than when something is considered fair (Barbalet, 2001; Shklar, 1990). If there is a judgement of unfairness but it is to a lesser extent, then there is a greater presence of cognitive reasoning, and the associated emotions are of a lower intensity (Turner, 2007). Thus, key to the evaluation of unfairness is the degree of intensity with which individuals express their negative judgement of the income they receive.

1.1. Variants of the meritocratic principle

In societies such as those of Latin America, for much of the twentieth century equality was the most recognised notion of justice; however, towards the end of the century and still to this day, equity based on equality of opportunity and merit has taken the lead.

From a normative perspective, meritocracy as a principle of justice emphasises the value of equity, that is, whether income and wealth are distributed according to the contributions of each individual (Liebig & Sauer, 2016; San-

del, 2020; Young, 1958). The preference for meritocracy, that is, its internalisation as a desirable principle of justice, is widespread even in the highly unequal societies of Latin America, where the majority of the population believe that factors associated with individual merit prevail – or should prevail – over structural factors in determining income and wealth (Bucca, 2016; Kluegel & Smith, 1986; Mijs, 2021; Scalon & de Oliveira, 2019). In Chile, preference for the meritocratic principle is high, but perceptions of its real-world effectiveness are lower (Castillo, 2011; Castillo et al., 2023). Given the predominance of perceived income injustice despite this preference for meritocracy, there is a need to examine the principle of meritocracy, along with the set of principles of justice to which people adhere.

Education-based merit, measured as an individual's degree of investment – or years of study – to achieve a given level of education, or the earnings differences in proportion to contributions based on education, is perceived in many countries as justification for the higher income received by some (Duru-Bellat & Tenret, 2012; Evans & Kelley, 2022). The conceptual elements of the meritocratic principle also include hard work, which is used widely in the legitimisation of inequalities among the populations of various countries (Evans et al., 2010; Kluegel & Smith, 1986; McCall, 2013; Mijs, 2021).

Furthermore, in Latin American societies, a significant proportion of the working population earn their income through formal or informal self-employment, the specifics of which are worthy of some attention (Abramo, 2021). The evaluations made by individuals as to whether their income is fair or unfair depend on the economic performance of their own independent ventures, companies or activities – something that we consider a lesser-known variant of the meritocratic principle that differs from judgements made regarding income from employment.

Having made the distinction between these three variants of the meritocratic principle, we can now approach them as independent principles in order to establish whether they have different effects on subjective evaluations of income (un)fairness. The combination of a preference for meritocratic principles and the predominance of an evaluation of injustice can be attributed to several factors. First, although the desire for meritocracy is widely shared, for some individuals it coexists and intermingles with the perception that its influence is undermined by non-meritocratic factors such as an individual's family background and social capital, and this may, in practice, diminish their adherence to the principle of meritocracy (Bucca, 2016; Duru-Bellat & Tenret, 2012; Littler, 2018; McCall, 2013; Reynolds & Xian, 2014). Second, opinions on the relevance of these non-meritocratic factors depend on the positioning of individuals in either the lower or upper strata of society (García-Sierra, 2023; Mijs, 2021). Third, the influence of one or other of the meritocratic principles varies according to the social position being subjectively evaluated. For example, the belief that educational merit should be rewarded is relevant when it comes to judgements of the income of the upper-middle stratum, but not of the lower stratum (Mac-Clure, Barozet, Ayala & Moya, 2019).

1.2. Need-based justice

In recent decades, existing principles of justice have been complemented, especially in Sen's 'capability approach' (Sen, 2009; Nussbaum, 2000), by the satisfaction of subsistence and basic needs, which is defined as a principle of justice that is both essential and distinct from others such as equality and equity (Kittel & Traub, 2024; Traub, 2020). In this interpretation of Sen's approach, needs are understood as the resources required by individuals to develop their 'capabilities' (Kittel & Traub, 2024).

A number of approaches have been developed regarding how to identify these needs. One of the best-known involves the definition and measurement of needs according to a Multidimensional Poverty Index (UNDP, 2023). This consists of the measurement of various dimensions of deprivation, according to which a household or an individual can be considered poor (Alkire & Foster, 2011). In Chile, the measurement covers five dimensions: education, health-care, labour and social security, housing and environment, and networks and social cohesion, with indicators, gaps and weightings established for each (UNDP, 2023).

A second perspective for the definition of needs is based on individuals' subjective evaluations of need-based justice, rather than expert opinion (Bauer & Siebel, 2024). Needs at the level of physiological survival have been widely identified in empirical studies, but there is less consensus regarding those needs that go beyond this bare minimum and underlie the preference for the principle of need-based justice.

Among these higher-level basic needs is the importance attributed subjectively to having the resources to sustain a 'decent' life in generic terms, having sufficient food, having an income that makes it possible to meet material needs, having an income that covers the needs of the family, having sufficient income if there are children to maintain, having access to healthcare and education, having a minimum pension for those who really need it, having unemployment benefits for those that need them, and being able to participate in social life (Bauer & Siebel, 2024; Evans et al., 2010; Janmaat, 2013; Liebig et al., 2016; Max-Neef et al., 1986; Van Hootegeem et al., 2020).

This varied range of categories offers an opening into the semantics used by individuals but promotes a narrower definition of the principle of need. Relatively isolated geographical areas such as the one studied in this study foster contrasting ideas of justice based on the needs of people in the local community – a space that is less strongly framed by rules and anonymous relationships between individuals within the market (Elster, 1992; Henrich et al., 2010).

1.3. Principles of justice and objective social position

In the evaluation of income (un)fairness, one approach argues that pre-existing ideologies or belief systems and cultural characteristics are stronger motivators of an individual's perception of injustice than the objective or structural

conditions in which they live (García-Sánchez et al., 2022; Jost et al., 2004; Montada, 1998). These shared concepts of what is fair can be extended to a preference for one or other principle of justice (Parodi, 2011).

However, another approach proposes that objective social position – understood as a combination of socio-economic factors such as income, education, occupation and social mobility – exerts an influence either by enhancing belief in merit and the justification of income inequalities or by encouraging support for redistribution of income and wealth (Bucca, 2016; Choi, 2021; Duru-Bellat & Tenret, 2012; Guibet, 2012). Thus, according to this approach, the more disadvantaged the individual's objective social position, the more likely they are to express a subjective evaluation of unfairness with regard to their income, based on one principle of justice in particular. According to several studies, in Latin American countries, evaluations of unfairness in income distribution are more prevalent among those in the least favourable economic situations, especially those with lower incomes (García-Castro et al., 2023; García-Sánchez et al., 2022; Reyes & Gasparini, 2022).

The relative weight of the two types of factors is of particular interest when there is a daily personal experience of dissatisfaction and injustice regarding income received.

2. Method

The methodological design of our study is descriptive, explanatory and primarily quantitative, but includes some mixed quantitative and qualitative elements in the collection and analysis of data (Cresswell & Clark, 2017).

We use data from the Palena Province Social and Labour Survey, which we applied at the beginning of 2024. The target population consisted of inhabitants of the province aged 18 years and over who were in paid work the week before the survey was conducted. The sample design was probabilistic by district, with a final sample of 562 randomly selected individuals from households that were also selected randomly (Table 1). We considered an error level of 4% and a confidence level of 95%. Probabilistic sampling was carried out based on census data, which allowed expansion of the survey's data to the total population studied. Thus, the descriptive results are obtained using expansion factors.

The province of Palena is defined in public sector provisions as an 'isolated zone' due to its geographical location. The four districts that make up the province are Hualaihué, Chaitén, Palena and Futaleufú. The first is the closest to the regional capital, Puerto Montt, and the last two are the most distant. According to the 2017 census, the province has 18,349 inhabitants, with 8,569 working individuals aged 18 years and over.

In this article we use the data from a sequence of three questions in the Palena Province Social and Labour Survey, related to the respondents' evaluations of the fairness of incomes associated with their social position. The answers were typed by each interviewer on the tablet used to apply the survey.

Table 1. Sample description

Variable	Categories	Frequency (%)	
		Unweighted	Weighted
Sex	Male	42.7	67.2
	Female	57.3	32.8
Age	18 to 40 years	37.4	47.6
	41 to 59 years	44.8	41.1
	60 and over	17.8	11.3
Educational level	Full primary or less	25.1	46.7
	Full secondary	39.1	33.0
	Higher	35.8	20.3
District of residence	Hualaihué	33.5	31.3
	Chaitén	32.0	42.6
	Futaleufú and Palena	34.5	26.0
		100%	100%
N		562	8,569

Note: The weighted data are the result of the expansion factor applied according to the 2017 Census.

Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

First, vignettes or cards were presented to the respondents describing fictitious characters from four social strata, from the lower to the upper classes. These vignettes are representative of how individuals classify members of society according to results from a previous vignette-based survey applied to a representative sample of the Chilean population (Mac-Clure et al., 2019).

The vignettes described multiple socio-economic and cultural dimensions, and these are best described using measurable examples (King et al., 2004; Ravallion et al., 2016). Each card presented to the respondent identified a fictional person from the province of Palena by name and surname, detailing characteristics of age, employment activity, educational level, place of residence, income and social markers such as how they dress. The characteristics presented in the four vignettes formed prototypical profiles of inhabitants of the province and were created based on structured interviews conducted previously with inhabitants from different social strata. Together, these characteristics define a given social position, using language that is realistic and clear to respondents. In addition to enabling us to indirectly study topics that people find sensitive, the various vignettes allow explicit interpersonal comparisons with a common point of reference (Ravallion et al., 2016). To establish self-identification with a given social position, the respondent was asked: ‘To which of these four people do you feel most similar?’

As an illustration, one of the four cards presented to the respondents states: ‘José Mayorga, 50 years old. Local grocery merchant, married with 3 children, full secondary education, lives in Futaleufú town centre, descended from sett-

lers. He has an average income of CLP 1,500,000 [USD 1,540/EUR 1,470] per month. He dresses in good quality clothes suitable for the local environment: waterproof jackets and jumpers for warmth. He is committed to his business and, in his spare time, to his family. He spends time at home but also meets with his neighbours.’ In practice, as only two respondents self-identified with the vignette corresponding to the economic elite, only the vignettes for the other three social strata were included in the analysis. The wording used for each is presented in the Supplementary Materials.

In the second step, respondents were asked for their subjective evaluation of the income of the person represented in the vignette with which they identify. Each respondent was asked ‘How fair does that person consider his/her salary?’ and invited to select one of four alternatives ranging from *very fair* to *very unfair*. Thus, the respondent was presented with a question whose point of reference was the income that ‘is received’ by the vignette character with whom they share a social position, and, in order to select an alternative, they must apply reasoning as to what ‘should be received’.

The final step was to ask the respondent why the character on the card thinks that way. This took the form of an open question, and the reason given by the respondent was noted down by the interviewer. This encouraged the exploration of multiple reasonings rather than only predefined alternatives.

The answers to this open question were codified according to whether they alluded to one or other principle of justice as the basis for their response. The income depicted in the vignette with which each respondent identified and their answer to the closed question concerning their evaluation of the (un)fairness of that fictitious person’s income helped to focus their response to the open question on the principle of justice on which that assessment was based.

We used analytical constructs based on existing theories to guide the content analysis and identification of emerging variations or categories (Krippendorff, 2024). According to the theories of justice we reviewed, these constructs correspond to the principles of meritocracy, equality and need, with the data reduction revealing a number of categories and subcategories. These are detailed in the Supplementary Materials, while example responses are shown in the results section, below. Each response was assigned a unique code selected by the researchers, who are also the authors of this article. The response coding method is purely semantic and no attempt is made at this stage to interpret the meaning expressed by the respondents.

For the purposes of data analysis, the dependent variable is the subjective evaluation of the degree of income (un)fairness, and has three alternatives: *fair* (including *very fair*), *unfair* or *very unfair*. The independent variables are divided into two sets. The first consists of the principles of justice to which the respondents refer. Together with the quantitative data on these principles, we used the literal answers relating to each as qualitative information that helps to understand their subjective meanings. The second set of independent variables consists of the respondents’ objective social positions based on socio-economic variables.

Quantitative analysis helps with examination, exploration and reflection on adherence to principles of justice and the effect of this on the subjective evaluation of incomes, without testing hypotheses or formalising an explanatory model. It begins with descriptive statistics for the weighted data. Then, under the assumption that the three alternatives for the subjective evaluation of (un)fair income do not constitute a continuum of possibilities, we conducted an estimation using a multinomial logistic regression, applying a weighting factor for complex samples (Greene, 2018). Thus, we used multinomial logistic models, in which the dependent variable is nominal, proposing three mutually exclusive choices.

In a multinomial logistic regression, the estimated function is proposed as the logarithm of the probability of an option relative to a base category, which in the present study we defined as the *fair* alternative. Thus, the three categories result in two equations:

$$\text{Equation 1: } \ln \left(\frac{P_{\text{unfair}}}{P_{\text{fair}}} \right) = X\hat{\beta}_{\text{unfair}}$$

$$\text{Equation 2: } \ln \left(\frac{P_{\text{very unfair}}}{P_{\text{fair}}} \right) = X\hat{\beta}_{\text{very unfair}}$$

Equation 1 identifies the difference in the logarithmic probabilities of a respondent changing their subjective evaluation of their income from *fair* to *unfair* based on a change in one unit of the explanatory variables. Equation 2 identifies the difference in the logarithmic probabilities of subjectively evaluating income as *very unfair* instead of *fair*.

The ratio between the probability of an alternative (*unfair* or *very unfair*) and that of the base (*fair*) – the relative risk ratio (RRR) – indicates the change in the risk of the result falling into the comparison group as opposed to the base group. If the ratio is greater than 1, it indicates that the subjective assessment of income as *unfair* or *very unfair* is more likely than the *fair* option defined as the base, and the opposite if it is less than 1. Based on this, we estimate the probability that an individual will opt for certain alternatives given a variable that matches their principle of justice or one of their socio-economic characteristics when the other variables are kept constant. These probabilities are calculated as:

$$P_j = \frac{\exp(X\hat{\beta}_j)}{1 + \sum_1^2 \exp(X\hat{\beta}_j)}$$

where j represents the alternatives *unfair* or *very unfair* and X is a matrix of independent variables with no collinearity problems between them (see Supplementary Materials). The number of observations corresponds to those respondents who presented information on all the variables of interest in the database and comply with the independence assumption, without outliers.

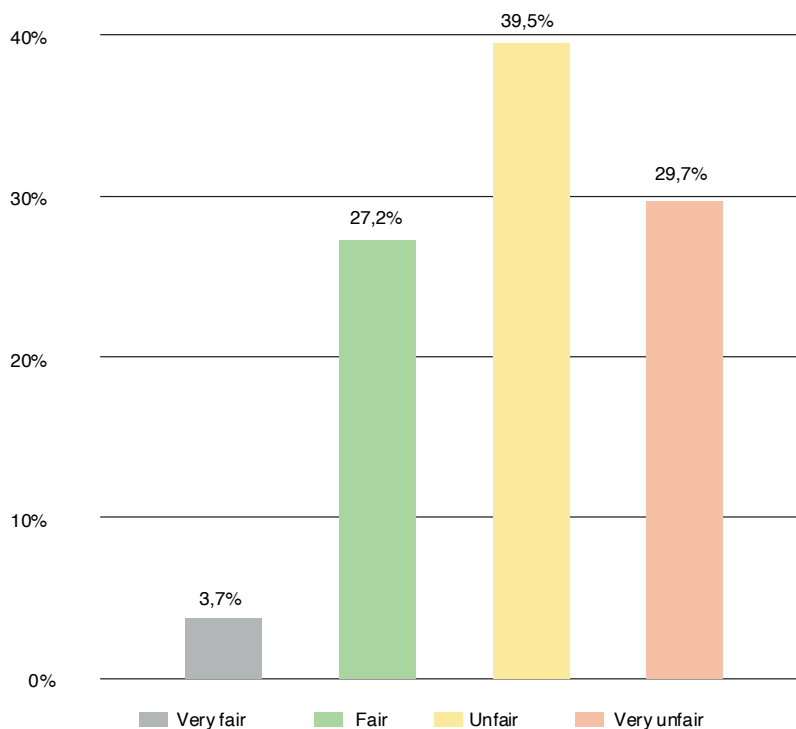
According to the first two equations, we estimated a multinomial logistic regression model before calculating the relative risk ratios (RRR).

3. Results

3.1. Results: Income (un)fairness

Figure 1 shows the responses of respondents regarding the degree of fairness of the income received by the vignette corresponding to the social position with which they identify.

Figure 1. Subjective evaluation of the (un)fairness of income received



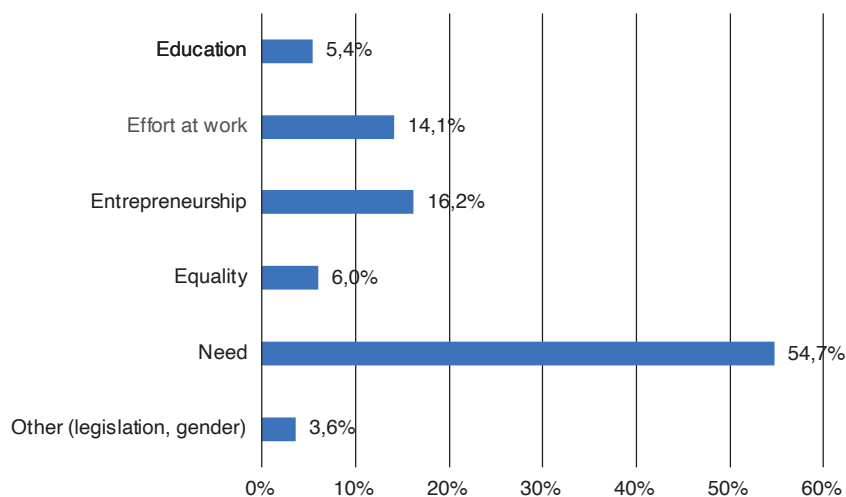
Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

Most of the individuals surveyed (69.2%) rate the income of their social position as *unfair* or *very unfair*. Of these, those who selected the *unfair* alternative are more numerous than those who selected the less moderate *very unfair* option. The small proportion of individuals who evaluate their income as *very fair* supports our decision to include the response in a single *fair* category.

3.2. Subjective evaluation of income and principles of justice

The reason given by each respondent for their evaluation reveals the principle of justice that informs their answer (Figure 2).

Figure 2. Reasons associated with principles of justice given by respondents to explain their subjective evaluation of income



Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

Following an assessment of all the normative principles noted above, of which only 37.5% refer to merit of various types, we identify six categories, as described in more detail as follows:

First, 5.4% of respondents refer to education-based merit. Most argue that the effort made to gain an education justifies differences in income received, seeing it as a return on the investment made in one's education. Expressions used include: 'Her salary is fair given her level of education', 'He deserves what he earns because he studied' and 'She earns less because she did not continue her education'. However, some point to injustice, saying, for example, 'She did not have the opportunity to continue studying'. A smaller group of respondents argue that it is fair that income is proportionate to level of education because the latter is a resource that boosts an individual's contribution or outcomes, arguing, for example, that 'It is fair given the level of professional training they have' and 'Because working with people in healthcare is very difficult.'

Second, 14.1% of respondents referred to reasons associated with effort at work. According to their reasoning, merit is derived from vigorous and strenuous work, sacrifice, skill, effort, expertise, experience or the length of the working day. This variant of the meritocratic principle refers in most cases to the manual work carried out by the cleaner who features in one of the vignettes, and responses include expressions such as 'Cleaning is heavy work and the salary is too low', 'She is a hard worker', 'It is unfair given the sacrifice she makes', 'It is a lot of work for such a low wage' and 'It is unfair given the number of hours she works'.

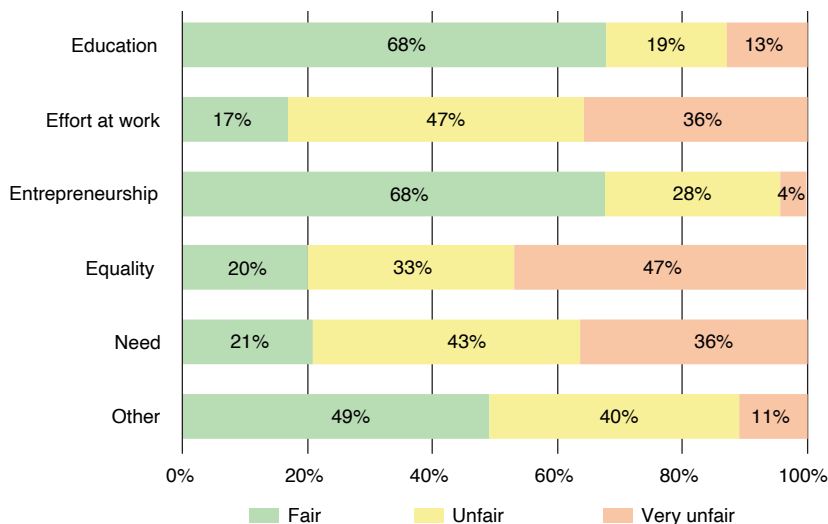
Third, 16.2% of respondents expressed justifications for income level based on individual entrepreneurship. This large group consists of those respondents who identify with the vignette representing a small trader and who talk about people who manage a company or undertake formal or informal independent activity. Some of their statements refer to the way the market works, positioning it as an objective condition that is relatively unrelated to individual initiative: 'I am also a trader and I know what incomes are like in this part of the country', 'His income is good for his sector', 'It is to be expected within the income range of an entrepreneur', 'One earns more in some months and less in others'. Others mention that the vignette character's income depends on his initiative and work as an entrepreneur: 'He generates his own resources', 'As an entrepreneur, his income depends on himself', 'The profit he makes depends on his investment', 'It depends on how much the person wants to earn', 'His income is the product of his effort and it is difficult to earn that here' and 'He works to achieve what he wants'. Thus, reasoning based on entrepreneurship refers to dependence of economic outcomes on the market and/or the individual, and has elements that differ from those of the other variants of the meritocratic principle.

Fourth, the reasons given by 6.0% of the respondents concern adherence to a principle of equality, with assertions such as 'She does not earn the same as other groups', 'A prescribed salary should be prescribed across the whole of society', 'The base salary is very low', 'The Minimum Wage is unfair, it should be increased' and 'The gap between people who have more opportunities and those who have fewer opportunities should be narrower'.

Fifth, 54.7% of respondents cite reasons based on the principle of need. Of this large group, only a few individuals refer strictly to survival needs, mentioning the 'need for income to feed or support their children', that 'they cannot get by on that income', or that 'that salary is only enough to cover electricity and water'. A greater portion of respondents make relatively generic references to the need for an income that allows them to live properly: 'If it is enough to live on, it is fair', 'It should be enough for them to live well' and 'to live without struggling economically'. Some specify family needs: 'It is unfair considering the reality of raising a family', 'She should earn more because she is a mother with children', 'She is unable to cover the cost of educating her children', and 'That income is reasonable to support a family'. Justifications also reference the higher cost of living in isolated areas: 'The cost of living here is very high' and 'It is fair that he has a higher salary because living in isolated areas is more expensive.' Others refer to the need to develop skills and make the most of opportunities: 'She should have more opportunities to get ahead' and 'She cannot give her children opportunities with what she earns'.

Finally, 3.6% of respondents offer other reasons, which are associated with gender justice ('She earns less because she is a woman') or with legislation on salary levels ('It is fair according to what is established on the salary scale by zone' or 'It is unfair that only public officials are paid zone-based allowances').

Figure 3. Income fairness according to principles of justice



Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

The principles of justice to which respondents adhere are linked heterogeneously to the way in which they evaluate their own incomes as (un)fair (Figure 3).

Respondents who evaluate the income level of their social position as *unfair* or *very unfair* do so primarily according to the principles of merit based on effort at work, of need and of equality. Of all respondents, 83% cite reasons associated with effort at work, 79% with the principle of need and 80% with the principle of equality.

The opposite is true of those who express a preference for the principle of meritocracy based on education or entrepreneurship, with 68% justifying their income according to each of these two principles. We find that, in terms of the subjective evaluation of income (un)fairness, the principles of meritocracy based on education and entrepreneurship are diametrically opposite in orientation to the principle of meritocracy based on effort at work.

Thus, there are two main trends in the association between adherence to certain principles of justice and representations of (un)fairness. However, those respondents who refer to each principle express diversity in their evaluations of income. For instance, among those who allude to the principle of education-based meritocracy, some evaluate income as *unfair* or *very unfair*, which suggests that references to this principle have more than one meaning in the evaluation of income. Furthermore, in the case of each of the various principles, there are differences in the proportion of those who evaluate income as *unfair* or *very unfair*.

3.3. Income (un)fairness, principles of justice and income level

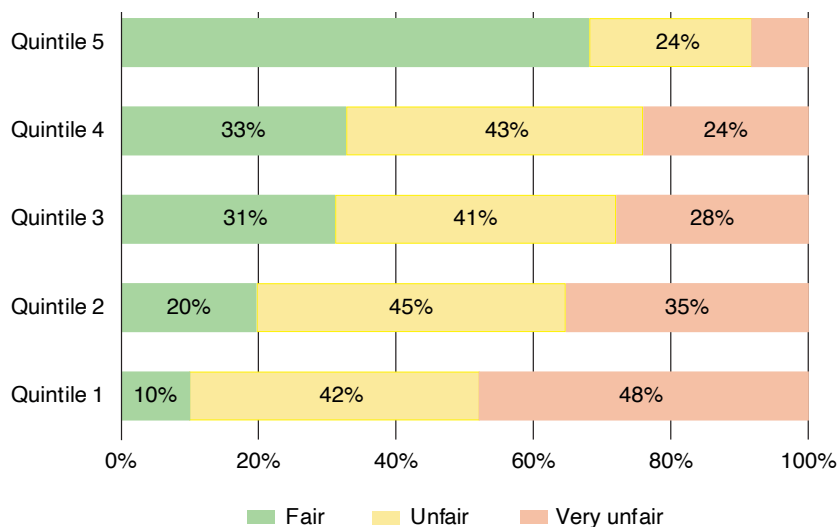
In addition to the links between respondents' subjective evaluations of income and their reasoning in terms of principles of justice, we observe particular forms of association with the objective social position of the individuals, measured in terms of their relative income within the province (Figure 4).

In the lowest quintile of incomes (quintile 1), 90% of respondents evaluate the incomes received by others of their social status as *unfair* or *very unfair*. This proportion decreases as the respondents' incomes rise. But while the highest percentage in quintile 1 is of those who rate the incomes of others of their social status as *very unfair*, in quintiles 2, 3 and 4 the highest percentage is those who rate it as *unfair*.

The exception to the majority evaluation of income as *unfair* or *very unfair* is among the respondents in quintile 5, of whom only a minority give this rating. There is a correlation here, in that the evaluation of income as *fair* is associated more strongly with higher-income individuals, with 68% of respondents in quintile 5 giving a *fair* rating.

Thus, when considering the income levels of the individuals surveyed, subjective evaluations of income as *unfair* or *very unfair* follow a pattern that differs markedly from that of evaluations of income as *fair*. Within these two major trends, however, the three alternatives for income evaluation also inter-mingle.

Figure 4. Subjective evaluation of income as (un)fair according to income levels



Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

4. Income (un)fairness, principles of justice, and objective social position

Based on the above descriptive presentation of factors associated with the majority subjective evaluation of income as *unfair* and even *very unfair*, it is worth conducting estimates concerning the influence of various variables on this evaluation. In Table 2, we estimate a multinomial logistic regression model for the subjective evaluation of income as *unfair* or *very unfair*, both relative to *fair*. The estimate covers the effect of two types of independent variables: on the one hand, those referring to adherence to the principles of justice that we have identified among the individuals surveyed; and, on the other, socio-economic characteristics relative to the objective social position of the respondents, specifically their sex, age, level of earnings, educational level, type of occupation and district of residence.

Adherence to principles of justice based on need and effort at work has a statistically significant and positive effect on evaluation of income received as *unfair* or *very unfair* – contrasting with adherence to the principle of meritocracy based on education –, compared to evaluation of income as *fair*, controlling for other variables. The principles of equality and entrepreneurship outcomes are not statistically significant, which indicates a relative convergence with those who apply the principle of merit based on education.

By applying this same logic to the socio-economic characteristics of the respondents, a significant influence on rating income as *unfair* or *very unfair* is exerted by having an income level in quintile 1 or 2, as opposed to quintile 5. However, there is no significant effect of quintile 3 on rating income as *very unfair*, which indicates that the evaluation of these middle-income individuals is not notably different from that of those in quintile 5. Having primary, secondary or technical education also has a significant effect on the ratings given by respondents relative to having completed a university degree, keeping the other variables constant.

In contrast with the above variables, the last two – occupation type and location – have a significant but negative effect. Being self-employed has a negative influence on evaluations of income as *very unfair*. Residence in the district of Hualaihué has a significant but negative effect on evaluations of income as *unfair*, meaning that there is a lower tendency to rate incomes as such among the inhabitants of this district, which is the closest to the regional capital, Puerto Montt. However, the effect is not significant relative to judging incomes as *very unfair*.

In subjective evaluations of income there is no significant variation according to sex, meaning that there is relative consensus between men and women. The increasing age of respondents has a significant influence, but only on the evaluation of their income as *very unfair*.

Thus, certain principles of justice and socio-economic characteristics of the respondents have a significant and positive effect on evaluations of income unfairness. The effect derives especially from the principles of justice based on need and effort at work, and among those with lower levels of income and education.

Table 2. Multinomial logistic regression model on the probability of rating income received as *unfair* or *very unfair*. Comparison with the alternative response of *fair*, according to respondents' reasoning linked to principles of justice and socio-economic characteristics.

Ref.: Fair		Unfair		Very unfair	
		Coef.	Std. Err.	Coef.	Std. Err.
Sex Ref.: Men	Women	0.244	(0.307)	0.078	(0.427)
Age	Age	0.018	(0.018)	0.036	(0.019)*
Income level	Quintile 1	1.916	(0.683)***	2.609	(0.800)***
Ref.: Quintile 5	Quintile 2	1.504	(0.600)**	1.380	(0.699)*
	Quintile 3	0.842	(0.532)	0.852	(0.642)
	Quintile 4	0.900	(0.558)*	0.827	(0.676)
Educational level	Primary	1.414	(0.560)**	2.177	(0.688)***
Ref.: University	Average	1.511	(0.458)***	2.233	(0.564)***
	Technical	0.980	(0.458)**	1.273	(0.609)*
Occupation type Ref.: Employed	Self-employed	-0.545	(0.441)	-0.981	(0.514)*
District	Chaitén	0.035	(0.393)	-0.324	(0.550)
Ref.: Futaleufú and Palena	Hualaihué	-1.099	(0.421)***	0.164	(0.509)
Principle of justice	Effort at work	1.884	(0.711)***	1.799	(0.960)*
Ref.: Education-based meritocracy	Entrepreneurship	0.340	(0.589)	-1.156	(0.993)
	Equality	1.261	(0.953)	1.726	(1.181)
	Need	1.850	(0.525)***	2.042	(0.847)**
	Other	1.363	(0.709)*	1.051	(1.122)
Constant		-3.329	(1.023)***	-5.505	(1.333) ***
Number of obs= 461					
Wald chi2(34)= 118.98					
Prob > Chi2= 0.0000					
Log pseudolikelihood= -6087.224		Pseudo R2= 0.2210			

Notes: * $p < 0.1$; ** $p < 0.05$; *** $p < 0.01$

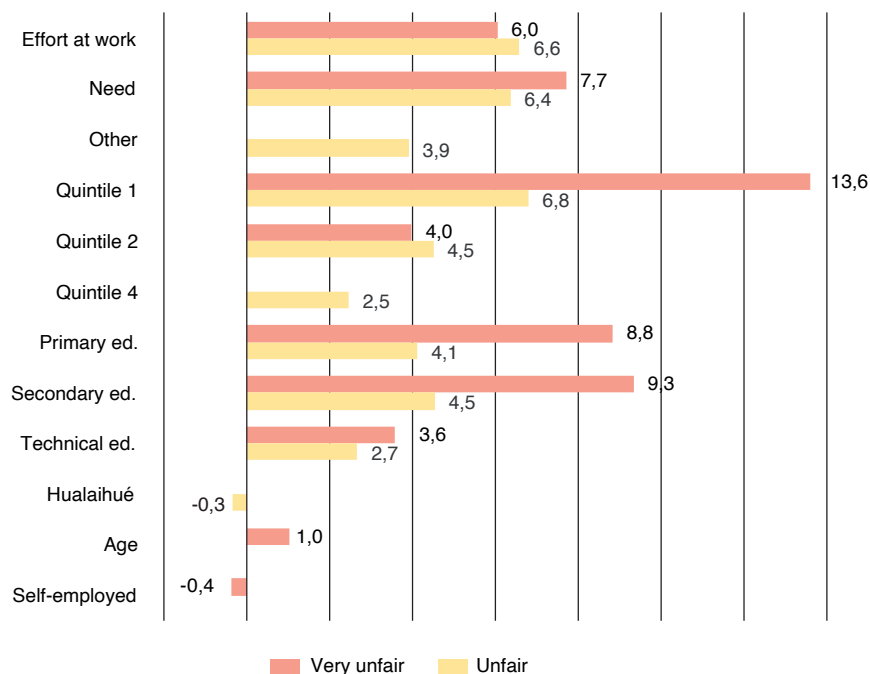
Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

The relative risk ratios (RRR) of evaluating income received as *unfair* or *very unfair* relative to the *fair* option allows us to examine a number of particularities (Figure 5).

If individuals adhere to the principle of effort, taking as reference education-based meritocracy, it is 6.0 times more probable that they rate their income as *unfair* or *very unfair* relative to *fair*. Similarly, if they allude to the principle of need, it is 6.4 times more probable that they rate their income as *unfair*, and 7.4 times more likely that they rate it as *very unfair*.

In terms of relative income, if individuals' earnings are in the first quintile, it is 13.6 times more probable that they rate the income of their social position as *very unfair* and 6.8 times more likely that they rate it as *unfair*. However, if respondents' incomes are in the second quintile, the probability of them rating it as *unfair* or *very unfair* decreases.

Figure 5. Relative risk ratios (RRR) when evaluating income received as unfair or very unfair. Comparison with the alternative response of fair, according to respondents' reasoning associated with principles of justice and socio-economic characteristics.



Note: Statistically significant results according to the multinomial logistic regression model (Table 2).

Source: Compiled by the authors based on the Palena Province Social and Labour Survey, 2024.

If individuals are educated to primary or secondary level, it is more probable that they rate income as *very unfair* rather than *fair* (8.8 and 9.3 times, respectively), and the probability that they consider it *unfair* is about half that. To a lesser extent, it is 3.6 times more probable that respondents with technical rather than university education evaluate income as *very unfair*, and less so as *unfair*.

By contrast with the above socio-economic characteristics, if respondents reside in Hualaihué, the district closest to the regional capital, rather than in Palena or Futaleufú, it is more probable that they rate income as *fair* than as *unfair*. Similarly, if respondents are self-employed, it is more likely that they rate it as *fair* than as *very unfair*.

In general, the probabilities of evaluating the income of their social position as *very unfair* are markedly higher than those of rating it as *fair* among respondents who adhere to the principle of need, and especially among those whose income level is in the first quintile and those who have only primary or secondary education.

5. Conclusion

These results must be interpreted in the light of the theory of justice, which states that, if from a subjective point of view earnings are lower than the notion of a fair income, this inadequate income is unfair. Our empirical approach suggests, first and foremost, that the subjective evaluation of unfairness follows shared patterns that differ from the evaluation of income as fair, and that there are also variations according to the degree of unfairness. This finding suggests the need for broader theoretical and conceptual reflection, although our data do not allow the generalisation of specific empirical results.

Preference for the meritocratic principle of education is usually associated with the justification of income inequality. In addition to confirming this, however, we have observed that the principle is not always associated with this justification, as some respondents consider that they did not have the same opportunities as others. However, this is less common. To the evaluation of income fairness based on educational merit, we add data on a variant of the meritocratic principle concerning the economic outcome of formal or informal entrepreneurship – activities that are extremely common across Latin American societies and in our study area.

In relation to the predominance of evaluations of income unfairness among our respondents, more important than the two variants of the meritocratic principle mentioned above are the other principles of justice. Unlike the other two variants, merit based on effort at work is associated predominantly with subjective evaluations of unfairness.

The variants of the meritocratic principle that we have examined – level of education attained, entrepreneurship and, above all, effort made in a challenging job – form the basis of a high proportion of evaluations of income (un)fairness. Evaluations of unfairness could be linked to what Castillo and colleagues (2023) observed in the case of Chile regarding limited perceived effectiveness of meritocracy, despite a greater preference for the meritocratic principle. Also strongly – but not exclusively – linked to these evaluations is adherence to the non-meritocratic principle of need, and our findings here join those of the most recent studies on the subject (Kittel & Traub, 2024; Bauer & Siebel, 2024).

Thus, adherence to one or other principle generates divergences in the subjective evaluation of income, but this is also influenced by objective social position in terms of income and education levels. The evaluation of income injustice depends largely on the respondent having lower levels of income and education themselves. This is consistent with studies that, across a number of Latin American countries, found an association between those with more marked economic disparities, especially in terms of income, and evaluations of greater unfairness in income distribution (García-Sánchez et al., 2022; Reyes & Gasparini, 2022). In contrast, proportionately less frequent justifications of income are associated with higher income levels and university education.

Thus, those who adhere to the principles of need and effort converge in the subjective assessment of income injustice, along with those who occupy an objective social position involving lower levels of income and education. This convergence among the individuals surveyed points to the existence of certain empirically observable conditions, although it does not indicate the circumstances under which they could have a real or potential effect on a macro-social level.

Furthermore, respondents who express an intense judgement of unfairness, describing the income of their social position as *very unfair* rather than merely *unfair*, refer less to principles of justice and base their judgements instead on their own objective disadvantaged social position. This suggests that other subjective factors not measured in our study could influence their evaluations. Future work could explore whether this more acute evaluation corresponds to a situation in which people more frequently express certain intuitions, feelings and social emotions.

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Supplementary Materials

<https://osf.io/x6mkf/overview>

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