# Università degli studi di Napoli Federico II

CORSO DI DOTTORATO IN
STUDI DI GENERE XXVIII CICLO

# Happiness and Well-being Revisited: Drawing on the Contributions of Contemporary Feminism to Redefine our Understanding of the Good Life

Tutor:
Ch.ma Prof.ssa
Caterina Arcidiacono

Candidato:
Salvatore Di Martino

Anno Accademico 2014-2015

# Indice 1

# Introduzione

Questo lavoro si propone di esplorare i contributi del femminismo contemporaneo al fine di rivalutare le attuali concezioni di benessere e felicità promosse dalla letteratura scientifica. A tal proposito, dopo aver introdotto l'argomento in una prospetta interdisciplinare, sono state presi in esame due specifici approcci femministi, ovvero l'economia femminista e l'etica della cura. La ragione di tale scelta è giustificata dal fatto che, entrambi offrono utili spunti di riflessione per comprendere come la ricerca mainstream sulla qualità della vita abbia mancato di analizzare tre aspetti fondamentali.

Il primo riguarda l'analisi della felicità e del benessere in una prospettiva ecologica (Kelly, 1966). Di fatto, molti degli approcci correntemente interessati allo studio e promozione di migliori condizioni di vita, hanno focalizzato la propria attenzione sul 'potenziamento' di capacità 'interne' all'individuo, quali autostima, ottimismo, ed autocontrollo (vedi Seligman, 2002, 2011; Lyubomirsky, 2001) ignorando che la qualità della vita coinvolge altri livelli esterni all'individuo, come il meso-livello delle relazioni e il macro-livello delle politiche e della cultura (Di Martino, Arcidiacono, Eiroa-Orosa, 2017).

Il secondo, include nella nostra comprensione di benessere e felicità elementi di giustizia ed equa distribuzione di risorse e opportunità all'interno della società. La letteratura scientifica sul benessere e la felicità ha, infatti, quasi del tutto ignorato la possibilità che condizioni di giustizia sociale possano avere un effetto sul perseguimento, anche individuale, della buona vita (Prilleltensky, 2012). Infatti, come nota Prilleltensky

*'la ricerca sul benessere soggettivo raramente o mai fa riferimento alla giustizia nelle sue argomentazioni. Nella maggior parte dei casi, età, cultura, matrimonio, supporto sociale, disoccupazione, e adattamento spiccano in ogni lista dei predittori del benessere, la giustizia invece non compare mai*' (Prilleltensky, 2012, p. 3)

Il terzo punto, riguarda il ruolo dell'etica e della morale. Anche in questo ultimo caso, il sapere accademico non ha preso ancora in attenta considerazione la necessità di promuovere benessere e felicità in una prospettiva etica che consideri il rispetto e la cura degli altri come elementi fondamentali della buona vita. Tale assenza dal panorama scientifico è dovuta, principalmente, ad una visione della scienza in generale, e di quella dedicata al benessere e alla felicità in particolare, come disciplina oggettiva e priva di valori. Tale atteggiamento epistemologico è da inputare, in buona parte, per l'estromissione di principi etici dallo studio e promozione della buona vita (Sachs, 2013).

Al fine di affrontare questi tre punti nodali del dibattito sulla felicità e il benessere, ho analizzato in dettaglio la letteratura psicologica, economica, e femminista. Parte degli elementi che formano questo lavoro, attingono a contributi, rivisti e arricchiti per conformarli agli scopi di questa tesi. Alcuni di essi sono già stati pubblicati su riviste e volumi nazionali e internazionali, altri sono in fase di scrittura e/o pubblicazione (vedi Di Martino, Arcidiacono, Eiroa-Orosa, 2017; Arcidiacono & Di Martino, 2016, 2012, 2011; Natale, Di Martino, Procentese, & Arcidiacono, 2016; Natale, Arcidiacono, & Di Martino, 2013; Di Martino, 2013)

Il primo capitolo '*Happiness And Well-Being in Psychology and Economics: A Critical Overview'* esplora in dettaglio i principali contributi della letteratura sulla felicità e il benessere. In particolare, l'analisi è stata focalizzata su due discipline in particolare, l'economia e la psicologia della felicità, le quali nel corso degli ultimi anni hanno contribuito particolarmente all'avanzamento di tale campo di studi. Tale excursus ha seguito una linea di analisi che, da un estremo esamina quei modelli considerati prettamente individualistici (Diener, Scollon, & Lucas, 2009; Diener, Suh, Lucas, & Smith, 1999), e dall'altro analizza gli approcci che hanno posto l'attenzione maggiormente su variabili socio-economiche al macro-livello (Helliwell, 2003).

Il capitolo, che prende parte dei suoi contributi dal recente articolo 'A Critical Analysis of Happiness and Well-Being. Where we Stand Now, Where we Need to Go' da me pubblicato insieme alla mia tutor, Caterina Arcidiacono (Arcidiacono & Di Martino, 2016), mostra come gli approcci sopra analizzati risultino, in un certo qual senso, facce della stessa medaglia, in quanto entrambi mancano di inquadrare il benessere e la felicità in una prospettiva ecologica dove il livello degli individui si connette a quello del sociale, delle politiche e delle istituzioni passando per il meso-livello dei rapporti interpersonali e con i gruppi. Anche il modello delle Four Qualities of Life, sviluppato da Ruut Veenhoven (2013), seppur considerato il più adatto ad inquadrare la qualità della vita in una prospettiva contestuale, non fornisce indicazioni su quali principi e buone pratiche applicare al perseguimento del benessere e della felicità in una visione ecologica.

Considerando le limitazioni degli approcci tradizionali alla qualità della vita, il secondo capitolo '*Etica della cura ed economia femminista: contributi per una innovativa visione della felicità*' introduce il pensiero femminista contemporaneo e i contributi che tale movimento apporta alla ridefinizione del benessere e della felicità. Partendo dalla critica all'*homo oeconomicus*, interessato alla massimizzazione del proprio benessere in termini di profitto e utilità, e di quello psychologicus, il quale persegue esclusivamente benessere soggettivo, viene presentata come alternativa la disciplina dell'economia femminista.

Questo ambito di studi, infatti, ha fortemente criticato l'economia mainstream, ritenendola eccessivamente incline verso valori maschili, come interesse personale, autonomia, astrazione e logica,  e con al centro, di conseguenza, l'uomo e le sue scelte (Woolley, 1993). Di conseguenza, l'economia femminista propone una nuova visione dell'essere umano, che integra valori quali connessioni, emozioni, rapporti intrapersonali (Peterson & Lewis, 1999).

Nella seconda parte del capitolo, l'attenzione è posta sulla necessità di incorporare all'interno dello studio sul benessere e la felicità, una concezione etica che possa guidare gli esseri umani verso pratiche conformi, sia al perseguimento personale della qualità della vita, sia al rispetto dell'altro, inteso come altri esseri umani, piante, animali e l'ecosistema in generale (Noddings, 2003, 1984). Come l'economia femminista, anche l'etica della cura ha criticato sia l'approccio filosofico (Schott, 2007; Nicholson, 1993; Blum, 1982) sia l'approccio psicologico allo sviluppo morale (Gilligan, 1982). In tal senso, l'etica della cura insegna che la felicità personale è strettamente connessa al mondo delle relazioni e del sociale. La cura per se è intrinsecamente legata alla cura dell'altro e di conseguenza, il perseguimento della felicità personale non può escludere il mondo della cura dei nostri simili e di tutti questi elementi appartenenti all'ambiente che richiedono l'interesse attivo del *carer* (Noddings, 2003).

Questo lavoro, che sarà presentato alla conferenza internazionale '*Da lontano. Dono, istituzioni, accoglienza*' ed incluso nel volume di prossima pubblicazione '*l'economia della promessa*' curato da Ugo Olivieri, conclude con alcune raccomandazioni utili per avanzare gli scopi sia dell'economia femminista sia dell'etica della cura. Ciò di cui maggiormente si avverte la necessità è un approccio teorico e metodologico che sia in grado di applicare i principi del femminismo agli individui, i gruppi, le istituzioni e alla società allargata.

A tal riguardo, il terzo capitolo '*The Capabilities Approach and Critical Community Psychology: Contributions for Individual and Social Well-being*' propone due discipline, l'approccio delle Capabilities, sviluppato da Amrtya Sen e Martha Nussbaum, e la Psicologia Critica di Comunità (Kagan, Burton, Duckett, Lawthom, & Siddiquee, 2011; Fox, Prilleltenky, & Austin, 2009). Martha Nussbaum e Amartya Sen considerano, seppur con le dovute differenze di approcci, il benessere, sia individuale sia intenso come sviluppo di un Paese, come l'acquisizione di libertà di scelta, elemento fondante il concetto di Capabilities, ovvero, come definito da Martha Nussbaum (2011, 2003) la capacità di un individuo di fare ciò che desidera e di essere ciò che desidera essere.

In relazione all'approccio delle Capabilities, la seconda parte del contributo propone l'approccio della Psicologia Critical di Comunità (CCP). Questo emergente approccio, sta ponendo una grande enfasi alle dimensioni sottostanti il benessere e la felicità (Arcidiacono & Di Martino, 2016). In particolare, la CCP offre strumenti e buone pratiche per analizzare e promuovere la qualità della vita sia in una prospettiva ecologica (Kelly, 1966), sia includendo condizioni di giustizia ed equa distribuzione di risorse ed opportunità all'intero della società (Prilleltensky, 2012), sia in una prospettiva che promuove la socialità e la responsabilità a quest'ultima associata (Arcidiacono & Di Martino, 2016). In tal senso, entrambi gli approcci descritti nel terzo capitolo concorrono ad operazionali zare i principi e le linee guida promosse sia dell'economia femminista sia dall'etica della cura.

In questa prospettiva teorica, la seconda parte di questo lavoro di tesi è stata dedicata a indagini empiriche che possano apportare utili contributi allo studio della qualità della vita in una prospettiva femminista.

Nel primo studio '*HappyApp, un nuovo strumento per misurare benessere e felicità in una prospettiva di genere*' si è voluto ridefinire il concetto di felicità e di benessere in una prospettiva contestuale. Partendo dalla critica che Martha Nussbaum (2012) ha rivolto agli attuali strumenti per la misurazione di tali costrutti, giudicati eccessivamente a-contestuali, lo scopo di questo lavoro è stato di creare un nuovo strumento capace di cogliere gli aspetti contestuali del benessere e della felicità degli individui. La HappyApp, è infatti uno strumento disegnato per essere utilizzato dagli utenti in maniera giornaliera. A conclusione dei ogni giornata, i rispondenti possono valutare sia il livello di gradimento della giornata in generale, sia ambiti specifici della propria vita, come salute, lavoro, famiglia, amicizia, etc. A tal fine, una lista di 19 aree del benessere è stata stilata, sia sulla base di precedenti ricerche empiriche sull'argomento, sia mediante il contributo di un de gruppi, uno di esperti academici e l'altro di persone non afferenti al contesto universitario.

Il secondo studio '*Happiness as Fairness. A cross-national comparison between Social Justice and Life satisfaction in OECD Countries*' mostra come condizioni di giustizia sociale influenzino la felicità dei cittadini di un dato paese. Comparando il Social Justice Index 2011 (Schraad-Tischler, 2011) con la 'variable soddisfazione di vita' rilevata dal Gallupp World Poll and utilizzata nello Human Development Index (HDI) 2011, lo studio si propone di mostrare, attraverso una serie di regressioni lineari, che la felicità delle persone è direttamente influenzata dalle condizioni di giustizia del proprio paese, e tali relazione continua ad avere effetto anche in presenza di variabili di controllo quali: il PIL, la dimensione geografica del Paese espressa in $Km^2$, la numerosità della popolazione, e l'orientamento politico del partito al governo del Paese.

Questo studio, che verrà a breve inviato al *Journal of Happiness Studies* per pubblicazione, forma la base per un successivo lavoro, nel quale intendo superare alcuni dei limiti posti dal Social Justice Index (es. limitata numerosità campionaria, assenza di alcuni degli elementi costituivi il costrutto di giustizia sociale, come la giustizia di genere) costruendo un nuovo strumento denominato Global Index of Social Justice (GISJ). Tale lavoro verrà inviato all'European Research Council Starting Grants scheme come richiesta di fondi come Starting Grant (https://erc.europa.eu/funding-and-grants/funding-schemes/starting-grants).

Nell'ultimo studio '*Assessing the Ethics of Justice and Care: Italian Validation of the Measure of Moral Orientation Second Revision (MMO-2)*' è stata eseguita la validazione al contesto Italiano della Measure of Moral Orientation second revision (MMO-2), uno strumento sviluppato originariamente da Liddell e colleghi (Liddell & Davis, 1996; Liddell, Halpin G., & Halpin, G.W., 1993, 1992), ed ora alla sua seconda revisione (Cooper, Liddell, Davis & Pasquesi, 2012), per la misura dell'orientamento morale all'etica della giustizia e della cura.

Dalle analisi condotte nel contesto del modello delle equazioni strutturali (Kline, 2011), si è giunti alla conclusione che, al fine di far acquisire un'adeguata validità psicometrica a questo strumento, è necessario che gli autori apportino ulteriori modifiche sia alla composizione delle vignette utilizzate nella scala (questo studio suggerisce di ritenere 4 vignette, piuttosto che 7, come originariamente sviluppato dagli autori) sia alla composizione degli item utilizzati per misurare l'orientamento morale alla giustizia e l'orientamento morale alla cura.

Questo lavoro, che verrà inviato al *Journal of College Student Development* (http://muse.jhu.edu/journals/journal_of_college_student_development/) come pubblicazione, mira a promuovere maggiore consapevolezza e diffusione in Italia in merito ai contributi dell'etica della cura.

I contributi, sia teorici sia empirici, presentati in questo studio di tesi di dottorato, rappresentano un'opportunità per riformulare le attuali concezioni di benessere e felicità in una prospettiva femminista. In particolare, ho proposto in questo lavoro di incorporare tre concetti fondamentali negli studi sulla qualità della vita, ovvero una prospettiva contestuale, giustizia sociale ed equità, ed un approccio etico e morale.

Come questo lavoro mira a dimostrare è, infatti, ancora necessario un intenso lavoro di comprensione dei fenomeni analizzati al fine di poter promuovere migliori pratiche di analisi e intervento mirate alla promozione del benessere e della soddisfazione di vita.

Ignorare gli elementi appena citati, infatti, ancora conduce, molto spesso, alla eccessiva responsabilizzazione degli individui in merito al perseguimento della felicità, con il rischio di 'incolpare la vittima' nel caso in cui le persone non mostrino un accettabile livello di benessere (Held, 2004; Ryan, 1971).

Questo lavoro offre alcuni spunti di riflessione, si spera utili, per ricercatori, accademici, professionisti e operatori interessati a nuove pratiche e formulazioni teoriche nel campo della qualità della vita. Sono numerose le possibilità applicative e teoriche insite in tale ambito di studi e questo mio lavoro di tesi costituisce un tentativo di avanzare le attuali conoscenze scientifiche verso una migliore comprensione di come perseguire felicità e benessere, sia a livello individuale, sia per costruire società più eque, giuste, etiche e, dunque, più sane e felici.

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# Chapter 1:

# Happiness And Well-Being in Psychology and Economics: A Critical Overview

Abstract

This chapter aims to critically introduce the concept of happiness and well-being. Two disciplines will be examined for this purpose, namely psychology and economics, in that they both have been particularly committed over the past decades to advancing the study and promotion of the good life. However, they also present some limitations, which will be analysed in detail in this chapter. In particular, I hold that psychology is overly focused on the individual level of analysing thereby ignoring more external determinants of happiness and well-being. Economics, on the other hand, has developed a focus mainly on the macro-level whilst still borrowing psychological instruments to measure life satisfaction and well-being. The chapter concludes with an overview of Veenhoven's Four Qualities of Life model, which holds the promise to keep together both the individual and social level of analysis. Nonetheless, the chapter highlights the need for more examples of principles, values, and good practices to redefine our understanding of the good life.

***Keywords***: Happiness, Well-being, Economics of Happiness, Psychology of Happiness, individual perspective, social perspective

## 1.1 Introduction

In recent decades happiness and well-being have experienced a crescendo of interest in many fields, among which psychology (Diener, Scollon, & Lucas, 2009; Seligman, 2002a, 2011; Argyle, 2001), philosophy (Haybron, 2008), policy making (Bok, 2010; McGillivray & Clarke 2006), anthropology (Thin, 2012; Mathews & Izquierdo, 2009) economics (Frey& Stutzer, 2010; Layard, 2005), and public health (Powers & Faden, 2006) figure prominently.

The great variety of resources and the inderdisciplinarity that all these approaches offer is undoubtedly an advantage for the study and promotion of the good life. However, interdisciplinarity can also be fraught with challenges, especially if our intention is to shed light on people's quality of life from a critical perspective. As Diener (2009) reminds us, there is still a lack of communication within the scientific literature. This has led, in many cases, a number of unconnected disciplines to develop very different models and strategies on intervention for the promotion of the good life. Therefore, if our objective is to draw on the interdisciplinarity of the happiness and well-being scientific arena, we must also be mindful of the need to put together different scholarships in constructive manner (Di Martino, 2013).

Therefore, in this introductory work we will narrow down our focus to two main fields: psychology and economics. There are at least two points in support of this choice: a) these two disciplines have been, in recent years, largely committed to studying, disseminating, and actively promoting happiness and well-being worldwide, and b) they are also engaging in a fruitful dialogue and an attempt to pool together their resources, which is casting an interesting sidelight on the comprehension of these phenomena (see Frey & Stutzer, 2010; Dolan, Peasgood, & White, 2008).

Furthermore, the compendium of theories and approaches described over the next pages sets out to clarify for the reader at least three aspects. The first shows the great variety of perspectives pertaining to people's wellness, the second the advantages as well as shortcomings of each, and the third an understanding of where we stand at the moment and to where we wish to head in regards to the promotion of better life conditions for everybody.

One last note, before we begin to address the issues at stake in more detail. Happiness and well-being are two highly debated concepts, with overlapping meanings and theorisations. We are mindful that, given the large number of definitions, models, and views described in the following pages, the reader might be in need of some sort of map. Therefore we have provided a series of summary tables (see Appendix 1), which showcase the key points of each of the main models of happiness and well-being that will be addressed in the this work (Di Martino, Arcidiacono, & Eiroa-Orosa, 2017).

We believe that this tool will be of great use for better understanding the high complexity of mainstream approaches to happiness and well-being (where we stand now) and those which strive to propose a new vision of the quality of life (where we need to go).

## 1.2 Happiness and Well-being in Psychology

The study of positive human functioning has a long-lasting tradition in Psychology and Social Science, which, to some extent, might trace back as early as 1930's, to Gordon Allport's theory of mature personality (Allport, 1937). On the same line as Allport, in 1950's Abraham Marlow proposed a hierarchical model of human needs where at the top of the pyramidal representation (although Maslow himself never depicted his theory in the shape of a pyramid) placed self-actualization (Maslow, 1954).

However, the scientific study of the positive aspects of quality of life started to gain proper recognition only towards the 1950's and throughout all the 1960's. In 1958, in fact, Marie Jahoda published her seminal work '*Current Concepts of Positive Mental Health*', in which she argued that mental health is a state of affairs that goes beyond the mere absence of illness. To better define mental health, she proposed six concepts associated with positive mental health: attitudes towards the self, development of self-actualization, integration of psychological functions, autonomy, accurate perception of reality, and environmental mastery (Jahoda, 1958).

Following the 1970's, with the paradigm-shifting introduction of the biopsychosocial model by Engel (1977) the interest of the scientific community in positive and optimal functioning and hence happiness as a desirable state of the human condition consistently augmented. Today, when we look back at the past achievements in the field of happiness studies, we realize that in the span of about six decades publications on this topic have increased of nearly one-hundred times (see fig. 1) (Veenhoven, 2009).

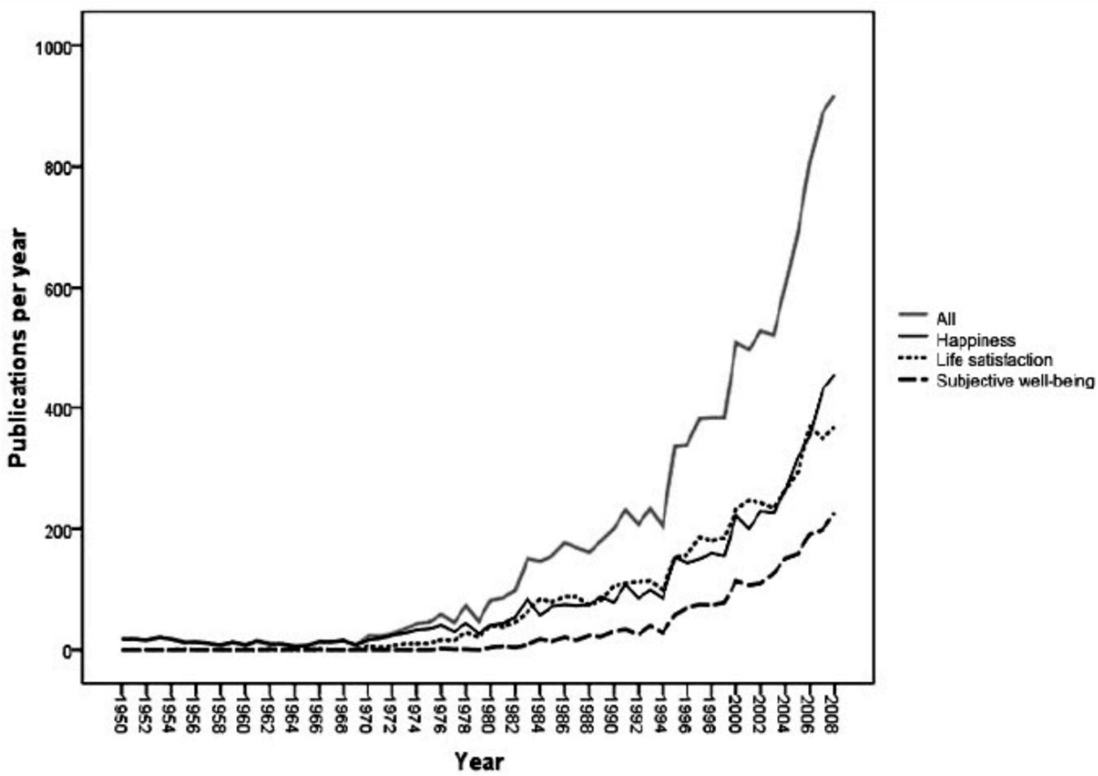


Fig. 1.1. Publications on happiness in psychology 1950-2008. Source: (PsychInfo. Terms used in abstract or keywords, in Veenhoven, 2009)

Despite Jahoda's and Engels' intention to promote a broad vision of the good life able to encompass social and contextual determinants, the most recent psychological developments in the field of happiness studies have moved particularly on the exploration of subjective well-being as individual appreciation of life, self-realization, and social integration, as we shall better see in the next paragraph.

### 1.2.1 *Psychological Approaches and Theories of Happiness and Well-being*

According to Ed Diener, 'Subjective well-being' is an umbrella term used to describe how people evaluate their lives in terms of emotional responses, domain satisfactions, and global judgment of life satisfaction (Diener, Suh, Lucas, & Smith, 1999). Each of these domains can be analysed both separately and in conjunction. In fact, although they are all correlated to one another, they also provide unique information about the subjective quality of one's life (Diener, Scollon, & Lucas, 2009, p. 71). Figure 2 below shows the structure of SWB's dimensions in a graphical format.

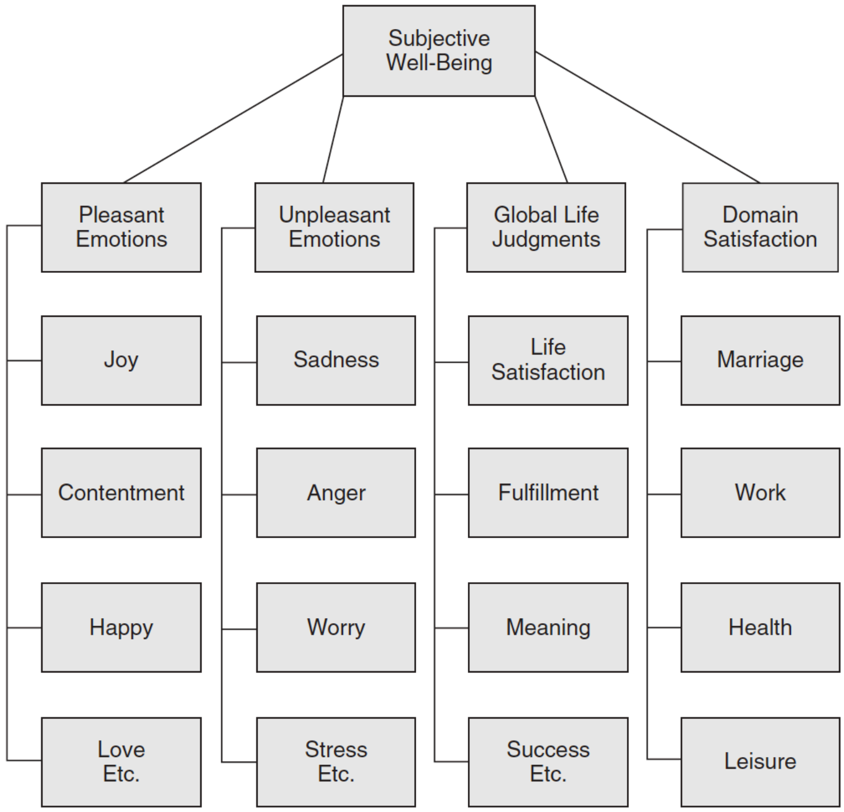


Fig.1.2 Hierarchical model of Subjective Well-being. Source: (Diener, Scollon, & Lucas, 2009, p. 71).

The theory of SWB is avowedly interested in the internal and external factors which influence people's life (Diener, 2009, p. 3). However, the main focus of analysis is always the individual and its subjectivity. In Diener's language, elements such as "*health, comfort, virtue, or wealth… are seen as potential influences on SWB, they are not seen as an inherent and necessary part of it*" (Diener, 2009, p. 13). By the same token, personality, material resources, and social relationships are considered critical determinants of SWB and so the importance of living in cooperative and trust-based societies is stressed (Tov & Diener, 2009). Yet, their values are assessed based only on the positive impact they have on people's quality of life, not as an end in itself. In other words, Diener's theory of SWB does not go beyond the benefits that a good society has on the individual level.

Carol Ryff (2014; 1989), by shifting perspective from satisfaction with life to sense of meaning in life as well as the pursuit of one's ethical life values, grounds her theory of Psychological Well-being (PWB) in the ancient concept of 'eudaimonia' (Aristotle 384–322 BCE), which emphasizes the importance of being true to one's inner self (daemon).

In line with the ancient philosopher, who posited that the pursuit of the good life entails identifying one's virtues, cultivating them, and living in accordance with them, Ryff's theory focuses on human development and existential challenges of life (Ryff & Singer, 2008; Keyes, Shmotkin, & Ryff, 2002). In a slightly more social-orientated approach to Diener's, she also includes 'environmental mastery', among other dimensions of psychological well-being. Environmental mastery pertains to the individual's capacity to actively choose and change the context and also to make it more suitable to one's psychic and psychological make-up (Ryff, 1989). However, the author pays too much attention to the power of the subject to modify and intervene to transform the context, regardless of the objective features of the context itself and the resources in terms of possibilities that the latter may or may not offer.

Corey Keyes (1998), avowedly departing from a strictly individualistic approach, aims to ground his theory of well-being in a social perspective. According to the author, well-being is "*the appraisal of one's circumstances and functioning in society*" (Keyes, 1998, p. 122). Within this general definition, Keyes proposed five dimensions of what he defined 'social well-being', that is: social integration, social contribution, social coherence, social actualization, and social acceptance. The theory of social well-being was originally aimed at bridging the gap between the 'private' side with the 'public' one of human optimal functioning. However, despite its relative social nature, Keyes's model is still overly based on people's perception of their state of well-being as well as their capacity for adaptation and integration into society. Due to its limitations the theory of social well-being still fails to achieve its goal of defining the nature of well-being in social terms and overcome the individual level of analysis.

Following the same line of inquiry, Deci and Ryan (2008, 2002) proposed an integrative model of motivational determinants of happiness and self-realization, which is based on the theory of the basic psychological needs (i.e., autonomy, competence, and relatedness). The self-determination theory (SDT), posits that both the content of a goal one pursues and the reasons why it is pursued can influence one's well-being. Building on it, social and contextual conditions are responsible for either enhancing or hindering human growth through supporting autonomy, competence, and relatedness both for intrinsic and nonintrinsic motivation (Ryan & Deci, 2000). However, it must be noted that the primary focus of the STD theory is always the well-being of individuals and therefore context is still seen only as an external agent of individual change.

The happiness and well-being psychologist likely to be the best known to the general public is Martin Seligman, one of the fathers of the movement named Positive Psychology (Seligman & Csikszentmihalyi, 2000). His theory of happiness, originally included Positive Emotions, Engagement, and Meaning (Seligman, 2002a), which was further developed in a theory of well-being encompassing two more domains, that is Relationships and Achievements (Seligman, 2011) (see full model in Fig. 3).

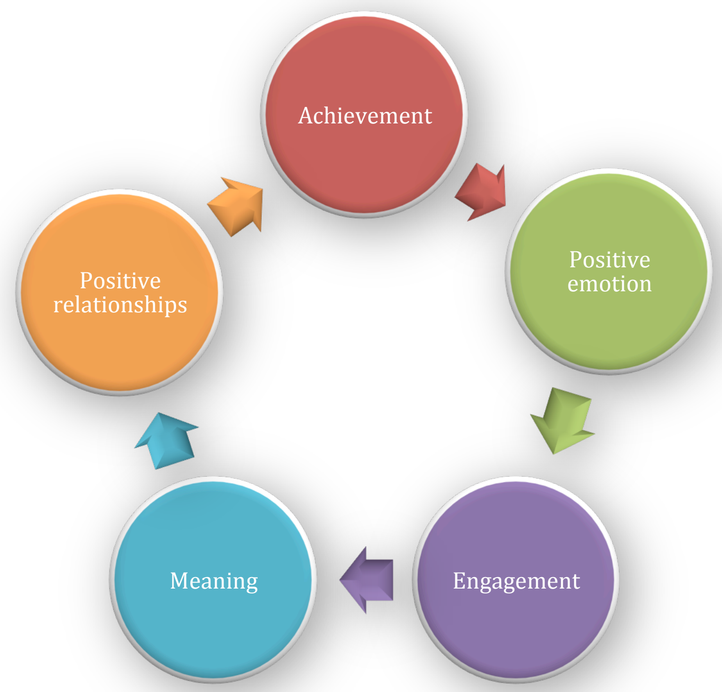


Fig. 1.3: Seligman's PERMA model of Well-being

There are some aspects of Seligman's work that deserve consideration. Among these, a) shifting of the psychological focus from the psychopathology approach to one based on preventing the causes of mental illness and further to this promoting better life conditions for everybody (Seligman, 2002b; Seligman & Csikszentmihalyi, 2000); b) the investigation of the universal roots of human strengths, values and virtues (Peterson & Seligman, 2004), and c) the embedding of the study of happiness and well-being in a multilevel perspective, which includes: Positive experiences and enduring psychological traits at the individual level, Positive relationships at the meso-level, and Positive institutions at the organization and macro level (Seligman, 2002b).

However, the last level of analysis has been largely overlooked (Gable & Haidt, 2005). Indeed, Seligman's approach – and that of Positive Psychology more in general – has been highly criticized for placing undue responsibility on the individuals to determine their life with a narrow sense of the social as a consequence (Becker & Marecek, 2008), which led it to become the emblem of the individualistic vision of happiness (Arcidiacono, 2013).

Indeed, despite its merit, Seligman's approach – and the one of Positive Psychology more in general – has been highly criticized for placing an unduly responsibility on the individuals to determine their life with a narrow sense of the social as a consequence (Becker & Marecek, 2008).

In addition to this, other critiques have pointed that the extent to which Positive Psychology b) represents a new kind of ideology that discriminates alternative voices to its dominant message (Held, 2004), b) reinstate the current neo-liberal economic and political discourse (McDonald & O'Callaghan, 2008) and c) places too much value on positive functioning and ignoring the adaptive value of negative circumstances and emotions (Miller, 2008).

On the other hand, we must also acknowledge some recent attempts in the Positive Psychology literature to overcome some of these shortcomings. For instance, the issue pointed out by Miller (2008), that is the extreme focus on positive functioning, has been addressed by Ivtzan, Lomas, Hefferon, and Worth (2016) with what is has been defined as 'Second Wave of Positive Psychology' that is a new version of PP that embraces the negative side of experiences for human flourishing.

In addition to this, recent development in PP are increasingly using psychological happiness-based findings in order to promote social changes (Biswas-Diener, 2011) as well as to inform governmental policies about the necessity of including well-being among national indicators of country development (Diener & Tov, 2011; Bok, 2010; Diener & Seligman, 2004; Diener, 2000). However, much more advancements in this direction are needed before we can claim the Positive Psychology has overcome some of its major limitations, that is: a) the excessive focus on the individual level of analysis, b) the consequent lack of a political, value-based, and ethical stance, and c) the understanding of how social justice and equalities impact on people's well-being.

## 1.3 Happiness and Well-being in Economics

Similar to psychology, economics has a well-established tradition of inquiry into the field of happiness (see Bruni, 2006). This discipline, in overcoming the traditional GNP-based conceptions of well-being, is today paying increasing attention to a wider range of variables and indicators, in a way which is revaluing Adam Smith, the father of modern economics, who posited as early as the 18$^{th}$ Century the pursuit of happiness as intrinsically connected to justice, beneficence and prudence

An important contribution toward this paradigm shift comes from the discipline of Happiness Economics (or the Economics of Happiness), which has been gaining increasing recognition in recent years (MacKerron, 2012; Powdthavee, 2007; Graham, 2005a; Easterlin, 2004).

This new approach, which redefines the classical concept of utility in terms of happiness, has redressed a number of long-standing economic issues in a whole new fashion. Happiness economists have, in fact, drawn on subjective well-being findings to review the non-pecuniary effects of a high number of life domains, including unemployment (Clark & Oswald, 1994; Darity & Goldsmith, 1996), leisure (Eriksson, Rice, & Goodin, 2007) the relationship between happiness and economic growth (Kenny, 1999), the effects of political institution (Frey & Stutzer, 2002). In the next paragraphs, we shall explore some economics approach to happiness and well-being in detail.

### 1.3.1 *The Economic Approaches to Happiness and Well-being*

According to Frey and Stutzer (2010), happiness is not only a matter of individual pursuit, but is strongly determined by the kind of society one lives in. In their book

‘Happiness & Economics’ the authors draw an explicit link between concepts of utility and happiness and what kind of effect macro elements such as income, unemployment, and inflation have on life satisfaction.

Furthermore, the authors place relevance on the following three sets of sources for the promotion of the good life: a) personality and demographic factors (i.e. temperamental predisposition, traits and cognitive dispositions), b) micro- and macro-economic factors (i.e. per-capita income, unemployment, inflation), and c) the institutional (or constitutional) conditions in an economy and society (i.e. democracy, federalism).

In contrast to their vision, where happiness research is suggested to be used only to increase the strength of individual preferences (Frey & Stutzer, 2009), Richard Layard (2005) - follower of Jeremy Bentham’s utilitarian approach (1748–1832) – sustains the principle according to which societies and good governments should maximize the highest level of happiness for the greatest number of citizens. To this end, Layard has proposed ‘The Big7 model’ which presents seven main indicators of happiness that are quite fairly distributed between both internal and external determinants, that is: Family relationships, Financial situation, Work, Community and friends, Health, Personal freedom, and Personal values (Layard, 2005). Drawing from Layard’s contribution, the website http://www.actionforhappiness.org/ has recently sponsored a list of 10 key points to promote happiness around the world (see Fig. 4):

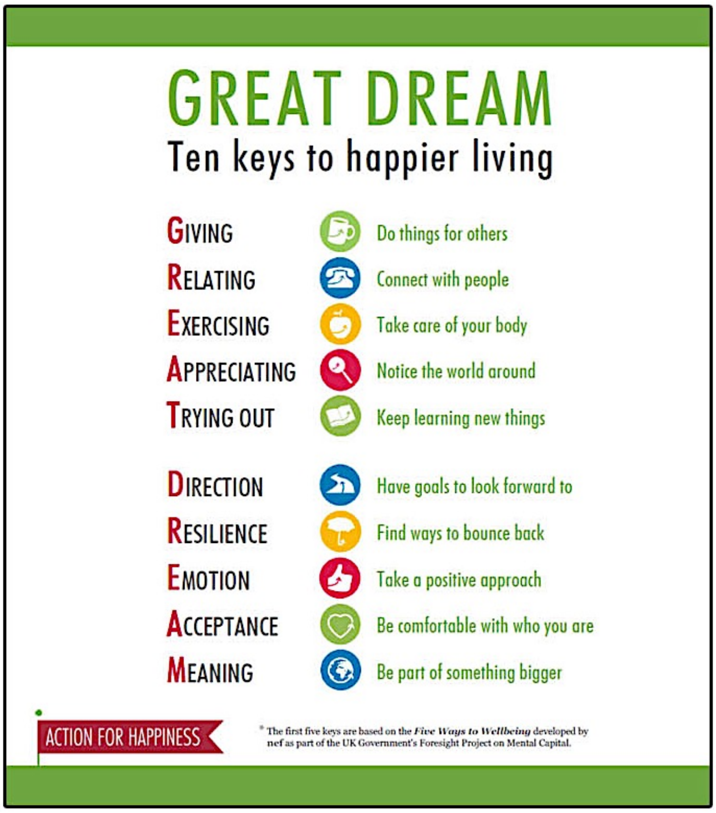


Fig. 1.4. Action for Happiness' Indicators. Source: https://ceezl.wordpress.com/2013/02/07/action-for-happiness/.

The utilitarian political approach championed by Layard, which prompts governments to utilize happiness as the main goal of national policies has met resistance from a number of scholars (Duncan, 2010; Frey & Stutzer, 2009). Among them, Amartya Sen (1999, 2009) has called into question Layard's utilitarian vision of happiness maximization on a number of occasions. The core of Sen's critique lies in the inability of utilitarianism advocates like Layard to focus on many other important aspects of societal well-being, and in particular on people's freedom to determine their life.

As the author points out in one of his recent writings, 'The Idea of Justice':

"*It is hard to deny that happiness is extremely important and we have very good reason to try to advance people's happiness, including our own… It is the claim that* *nothing else ultimately matters – liberty, equality, fraternity or whatever – that may not resonate so easily with the way people have thought and continue to think about what looks self-evidently good*" (Sen, 2009, p. 273-274).

However, both Layard's and Sen's approach, despite their open differences, agree on the necessity for economics to detach itself from a GDP-based model of national growth as well as the need to shift our focus on the improvement of people's quality of life, rather than only increase in financial resources.

A relevant example of this can be found in the 'Report by the Commission on the Measurement of Economic Performance and Social Progress' drawn through the joint efforts of Nobel prize laureates Joseph Stiglitz, Amartya Sen, and Jean-Paul Fitoussi (2009). The report's aim is to promote more efficient economic measures able to substitute the more obsolete GDP indicator. To this end, the report taps into a multidimensional definition of well-being, which include:

1. Material living standards (income, consumption and wealth)
2. Health
3. Education
4. Personal activities including work
5. Political voice and governance
6. Social connections and relationships
7. Environment (present and future conditions)
8. Insecurity, of an economic as well as a physical nature.

However, as clearly stated: "*The report is about measurement rather than policies, thus it does not discuss how best our societies could advance through collective actions in the pursuit of various goals*" (Stiglitz, Sen, & Fitoussi, 2009, p. 9).

Some contributions in economics are working towards this direction. In particular, new lines of enquires are taking into account a) the role of psychological variables (Kahneman, 2011, 2003; Tversky & Kahneman, 1974), b) the importance of social relationships (Bruni, 2010; Bartolini & Bilancini, 2010; Becchetti, Pelloni, & Rossetti, 2008), c) reciprocity (Sacco, Vanin & Zamagni, 2006; Zamagni, 2004), and d) trust and collaboration (Layard, 2005).

However, all these approaches still lack of a comprehensive theoretical and methodological framework capable of linking the micro individual level with the macro level of policies and institutions. Therefore, if we are to address the question of how to promote better life conditions in society, we need to first explore the best approach to achieve such a goal.

### 1.3.2. *Social livability and the Four Qualities of Life*

Within the sociological domain, Ruut Veenhoven's Four Qualities of Life Model represents a fortunate example of what it means to link good living conditions to the opportunities provided by the environment. In his model, Veenhoven defines the former livability, that is the degree to which provisions and requirements fit with the needs and capacities of its citizens, whereas the latter are defined 'life-ability', that is the inner capacities with which each individual is endowed, or "*how well we are equipped to cope with the problems of life*" (Veenhoven, 2013, p. 200).

Livability and life-ability can be combined in a four-by-four matrix. If we look at Fig. 6, the left top quadrant shows *Life-ability of the person***.** The right top quadrant denotes inner life-chances, that is: how well we are equipped to cope with the problems of life. The left bottom quadrant represents *objective-utility of Life*, or in other words the notion that a good life must be good for something more than itself and this presumes some higher values such as being a good citizen, a sense of morality, etc. Finally, the bottom right quadrant represents *Subjective appreciation of Life,* (i.e. the inner outcomes of life), that is the quality of life in the eye of the beholder. As we deal with conscious humans this quality boils down to subjective appreciation of life. This is commonly referred to by terms such as 'subjective well-being', 'life-satisfaction' and 'happiness' in a limited sense of the word (see full model in Fig. 5).

***Some sub-meaning within quality-quadrants***

| | *Outer qualities* | *Inner qualities* |
|---|---|---|
| *Life chances* | **Livability of environment**<br>· Ecological<br>e.g. moderate climate, clean air, spacious housing,<br>· Social<br>e.g.. freedom, equality and brotherhood<br>· Economical<br>e.g. wealthy nation, generous social security, smooth economic development<br>· Cultural<br>e.g. flourishing of arts and sciences, mass education<br>· Etc… | **Life-ability of the person**<br>· Physical health<br>negative: free of disease<br>positive: energetic, resilient<br>• Mental health<br>negative: free of mental defects<br>positive: autonomous, creative<br>• Knowledge<br>e.g. literacy, schooling<br>• Skills<br>e.g. intelligence, manners<br>• Art of living<br>e.g. varied lifestyle, differentiated taste<br>• Etc…. |
| *Life results* | **Objective utility of life**<br>· External utility<br>e.g. For intimates: rearing children, care for friends<br>e.g. For society: being a good citizen<br>e.g. for mankind: leaving an invention<br>· Moral perfection<br>e.g. authenticity, compassion, originality<br>• Etc… | **Subjective appreciation of life**<br>· appraisal of life-aspects<br>e.g. Satisfaction with job<br>e.g. satisfaction with variety<br>· Prevailing moods<br>e.g. Depression, ennui<br>e.g. zest<br>· Overall appraisals<br>Affective: general mood-level<br>Cognitive: contentment with life |

Fig. 1.5. The Four Qualities of Life. Source: (Veenhoven, 2013, p. 204)

Of all the theories and models of happiness and well-being we have shown so far, Veenhoven's Four Qualities of Life model is to a certain extent the most comprehensive model that keeps together the subjectivity of individuals with the feature of contexts. Yet, this model does not enter into detail on how to promote the different qualities of life, or to be more precise, what the strategies are that would best equip individuals and society at large to achieve the best results. We shall try to give an answer to this query in the next paragraphs by introducing the emerging approach of Critical Community Psychology, which in our view bears the potential to promote happiness and well-being in a whole new fashion.

## 1.4 The Individual versus the Social perspective: How do we pursue and promote happiness?

This paragraph shall deal with the thorny issue of combining two often-opposing stances, namely the individual and social vision of happiness and well-being. As Diener (2009) reminds us, one of the central dimensions of the research on happiness shows that "*the theory places the locus of happiness in external conditions such as income and status, as many sociological theories do, or within the attitudes and temperament of the individual, as many psychological theories do*" (p. 3).

Considering happiness and well-being as the achievement of personal/individual efforts might be useful to understand the subjectivity of people's quality of life, however this greatly overlooks social and contextual features. On the other hand, focussing too much on the social and political determinants of happiness, might be a good gauge for national policies to promote quality of life at the macro-level, but its widespread use of objective indicators often fails to delve into the subjectivity and everyday life of human beings.

As we have touched upon in the pervious pages, the individual perspective is often overly focused on subjective perception and personal achievements, ignoring or downplaying other more external determinants of wellbeing. A prime examples of this can be found in Sonja Lyubomirsky's *'The How of Happiness'* (2007), where the author sates that

*"…only about 10% of the variance in our happiness levels is explained by differences in life circumstances or situations – that is, whether we are rich or poor, healthy or unhealthy, beautiful or plain, married or divorced, etc…, whereas 50% goes to a biological set point and 40% to intentional activities*" (p. 21).

Assuming that objective and external circumstances have nearly no relevance, or at least only when judged subjectively, tends to ignore the fact that happiness comes as much from within as from without, a point that has instead been made by both psychologists and economists (Haidt, 2006; Layard, 2005).

This perspective is also likely to encounter some serious methodological issues. Typical questions used to assess people's happiness, such as "How satisfied are you with your life overall?" (British Household Panel Survey, BHPS), and "All things considered, how satisfied are you with your life as a whole these days?" (World Values Survey, WVS) can easily be subjected to biases, especially to those conditions that are likely to be influenced by temporary and fleeting mood changes (Schwarz & Strack, 2003, 1999; Schwarz & Clore, 1983) as well as time of the year and the presence of others during the interview (Kavetsos, Dimitriadou, & Dolan, 2014).

As a last note of caution, we should always bear in mind that when the power of individual efforts crowds out the role of external conditions, and the effect of positive or negative circumstances is neglected, the risk of 'blaming the victim' for failing to achieve a happy life is likely to loom quite large (Held, 2004; Ryan, 1971).

However, as we mentioned above, the individual perspective is not the only one to be exposed to criticism. The social and macroeconomic approach, on the other hand, takes too much for granted that the promotion of policies oriented to maximization of happiness for the greatest number of people is a sufficient condition for citizens to lead a fluffing life. This vision, in fact, assumes that anybody, if put in the right conditions, can thrive, regardless of the way in which opportunities are actually perceived, besides the extent to which they are made available and, above all, the way in which people can actually enjoy them (Barrotta, 2008).

Moreover, despite economics has favoured a macro perspective with regard to the promotion and maintenance of happiness and well-being, it still borrows the instruments that human sciences in general and psychology in particular have developed to tap into people's appreciation of life (Kahneman & Krueger, 2006; Graham, 2005b; Frey & Stutzer, 2002). This has lead on many occasions to assess national happiness as a scaled-up aggregate of individuals' life satisfaction (Helliwell, 2003). Again, contextual dimensions are overlooked, thereby subjecting the analysis of happiness and well-being from a macro-economic perspective to the instrumental biases already touched upon.

For instance, Isaac Prilleltensky' points out that

"*by focusing exclusively on subjective measures of well-being we fail to question the impact of contextual dynamics on people who report high levels of well-being despite living in very deprived community conditions… some of them do not want to portray themselves as the object of pity. There are many reasons because self reports are problematic ways of assessing well-being. The sources of bias are many, and social desiderability is very strong*" (Prilleltensky & Prilleltensky, 2007, p. 61).

Apart from social desiderability, people who avowedly report to be happy, despite adverse contextual circumstances, might do so because they have learned how to adjust themselves to a life of misery and, hence, how to set the bar low when it comes to appraising their lives (Sen, 1999).

In his latest book '*Social Happiness, Theory into Policy and Practice*', Neil Thin makes the case that happiness is not an 'asocial individualism'. As the author points out: "*Understanding happiness as an active, dynamic, and interpretive process also entails understanding it as a social process and not just a private judgement*". Because we are social beings "*subjective well-being is also intersubjective well-being...*" (Thin, 2012, p. 40).

In the light of this, we still cannot help but notice the lack of a comprehensive theoretical and methodological framework capable of linking the micro individual level with the macro level of policies and institutions. As Prilleltensky (2012) reminds us

"*strategies that concentrate exclusively on personal well-being undermine well-being because they do not support the infrastructure that enhances well-being itself" and, "conversely, any strategy that promotes well-being by environmental changes alone is bound to be limited*" (p. 72).

Therefore, we are faced with the challenge of seeking a middle way between the two opposite perspectives described above and, in doing so, bridging the gap between the individual-centred and macro-economic approaches.

## 1.5 Final Remarks

The complexity of social changes, globalization, and the marginalization and exclusion this is causing, together with increasing inequality in accessing resources and opportunities offer a new arena for debate and intervention for all those scholars, practitioners, and activists committed to promoting better life conditions for individuals and societies.

However, if we are to reach a full comprehension of social happiness, given the current state of affairs in the field, we should be careful not to become entrapped in the two opposing perspectives. As we have shown, on one side Psychology, as a science of subjective well-being, tends to see happiness as the result of personal efforts and achievements. It does so by gauging indicators such as: self-esteem, auto efficacy, life satisfaction, and flourishing. All of them share the limitation of being overly dependant on internal resources, potentials, and individual characteristics.

On the other hand, economics tend to borrow the instruments developed by psychologists to study happiness and well-being at the national and international level (Graham, 2005b). Its aim is to inform public policies primarily of the inner risks associated to unemployment, taxation, inequality, and lack of freedom (Bok, 2010).

The extent to which both these approaches are limited should be clear by this point. In other words, both the *homo oeconomicus,* who aims for the maximization of utility and the *homo psychologicus,* who pursues personal growth and optimal functioning are two obsolete models for interpreting reality and promoting the good life (Di Martino, 2013). What we need is a better understanding of both individual and social phenomena and how these interact with each other. In other words we call for a further concept of happiness, a deeper understanding of how people's enjoyment of life is connected to the features of the environment, focusing not only on which one affects which, but also on their mutual interactions.

However, the economic and psychological disciplines tend to exchange their view only within the narrowness of their research fields with a lack of shared tools and practices (Di Martino, 2013; Peterson, Park, & Seligman, 2005). Therefore, there is still work to be done in that direction.

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## Appendix A: Theories and Models of Happiness and Well-being (revised version from Di Martino, Arcidiacono, & Eiroa-Orosa, 2017).

| Theory and/or Model | Definition(s) | Dimension(s) | Key principles and/or areas of inquiry | Context(s) of analysis | Justice and Equity |
|---|---|---|---|---|---|
| **Subjective Well-being (SWB) (Diener, 2009; Diener, Scollon, & Lucas, 2009)** | Subjective well-being refers to the global experience of positive reactions to one's life. Life satisfaction pertains to a conscious global judgment of one's life. | • Pleasant Emotions<br>• Unpleasant Emotions<br>• Global Life Judgement<br>• Domain Satisfaction | • Health<br>• Achievement<br>• Social Relationships and Prosocial Behaviours<br>• Wealth<br>• Religion<br>• Personality | SWB primary resides within the experience of the individual. However, this does not rule out cultural differences in SWB. | SWB by itself is insufficient for evaluating the success of a society. It also needs to account for human rights and societal equality. |
| **Psychological Well-being (PWB) (Ryff, 2014, 1989)** | Psychological well-being is understood in terms of optimal functioning. Happiness is understood as short-term affective well-being. | • Self-Acceptance<br>• Environmental Mastery<br>• Positive Relations<br>• Purpose in Life<br>• Personal Growth<br>• Autonomy | • Leading a Life of Purpose<br>• Quality Connections to Others<br>• Self-esteem<br>• Mastery<br>• Life difficulties | Psychological well-being is explicitly concerned with the development and self-realization of the individual. | Impact of discrimination, status and social inequality, and belonging to ethnic minorities on Psychological well-being |
| **Well-being theory and PERMA Model (Seligman, 2011, 2002)** | Happiness includes Positive Emotions, Engagement, and Meaning. Well-being builds on these and adds to it Positive Relationships and Accomplishment | • Positive Emotions<br>• Engagement<br>• Positive Relationships<br>• Meaning<br>• Accomplishment | Strong emphasis on prevention and health promotion. Psychology should promote human flourishing, not just treating mental illness. | • Positive experiences<br>• Enduring psychological traits<br>• Positive relationships<br>• Positive institutions | Well-being should not be the only influence on public policy. We should also value justice, democracy, peace, and tolerance. |
| **Self Determination Theory (STD) (Deci & Ryan, 2008, 2002)** | Well-being refers to optimal psychological functioning and experience. It is also a multi-dimensional phenomenon that draws on both hedonism and eudaimonia. Happiness is a form of hedonic well-being that pertains to pleasure and enjoyment of life. | • Competence<br>• Relatedness<br>• Autonomy | SDT's arena is the investigation of people's inherent growth tendencies and innate psychological needs that are the basis for their self-motivation and personality integration, as well as for the conditions that foster those positive processes. | Strong focus on the relationship between individual and context. SDT includes the interaction between an active, integrating human nature and social contexts that either nurture or impede the organism's active nature. | Emphasis on human autonomy. The positions that fail to recognize the importance of autonomy for well-being may be inadvertently condoning the denial of human freedom to a significant portion of the inhabitants of the globe. |

| | | | | | |
|---|---|---|---|---|---|
| **Social Well-being (Keyes, 1998)** | Happiness is defined in terms of life satisfaction. Social well-being is the appraisal of one's circumstance and functioning in society. | • Social Actualization<br>• Social Acceptance<br>• Social Integration<br>• Social Contribution | Critique of multidimensional models that conceive of the self as primarily private. Emphasis on social nature of well-being. | Social well-being represents primarily a public phenomenon, since adults encounter social tasks in their social structures and communities. | Social structures contribute to either promote or hinder social well-being. |
| **Frey & Stutzer's approach to happiness in economics (Frey & Stutzer, 2010; 2002)** | Distinction between subjective and objective happiness, cognition and affect, and stocks and flows with regard to subjective well-being. | • Pleasant Affect<br>• Unpleasant Affect<br>• Life Satisfaction<br>• Labour Market<br>• Consumerism<br>• Family and Companionship<br>• Leisure<br>• Health | Psychological Perspective:<br>• Adaptation<br>• Aspiration<br>• Social Comparison<br>• Copying<br><br>Economic Perspective:<br>• Income<br>• Unemployment<br>• Inflation | • Personality Socio-demographic factors<br>• Micro and Macro economic factors<br>• Contextual and situational factors<br>• Institutional (or constitutional) conditions | Emphasis on procedural justice as right to participate to political decision-making and actual participation. Focus on the detrimental effect of inequality on happiness and the importance of freedom and democracy |
| **The Four Qualities of Life Model and Happy-Life-Years Index (Veenhoven, 2013)** | Happiness or 'Appreciation of life' combines 'Life results' and 'Inner qualities'. Well-being combines 'Life Chances' and 'Inner Qualities' | • Life chances<br>• Life results<br>• Inner qualities<br>• Outer qualities | • Liveability of the environment<br>• Life-ability of the individual<br>• External utility of life<br>• Inner appreciation of life | Analysis of conditions at the macro-level of society, the meso-level of organizations and the micro-level of individuals. | Cross-National application of the Happy-Life-Years Index shows high correlations with economic affluence, freedom, and justice. |
| **The Big 7 Model (Layard, 2005) and Action for Happiness (**http://www.actionforhappiness.org**)** | Happiness is a long-lasting experience that includes both fluctuating feelings and overall satisfaction with life. | • Family Relationships<br>• Financial Situation<br>• Work<br>• Community and Friends<br>• Health<br>• Personal Freedom<br>• Personal values | Supporter of the 'greatest happiness for the greatest number' principle. Happy societies are built on collaboration, trust, altruism, and good social relationships. | Happier societies strive to improve working conditions, family relationships, and local communities. Governmental policies should aim to maximise happiness for the greatest number of citizens. | Fairness is ultimately about how happiness is distributed. Government and citizens alike should focus on the equality with which happiness is distributed in society. |

# Capitolo 2:

# Etica della cura ed economia femminista: contributi per una innovativa visione della felicità

Abstract

Questo capitolo introduce i contributi del pensiero femminista contemporaneo per lo studio e promozione del benessere e della felicità. Dopo aver presentato lo stato dell'arte nel campo delle discipline psicologiche ed economiche, saranno introdotti due approcci afferenti al sapere femminista, ovvero l'economia femminista e l'etica della cura. Entrambe rivalutano molti degli assunti economici, politici, sociali ed etici che formano la base dell'attuale visione della felicità e del benessere nelle nostre società contemporanee. In particolare, l'economia femminista promuove di superare gli assunti dell'economia neoclassica, basati sulla visione dell'uomo economico, ed introdurre principi quali collaborazione, rispetto, e connessione. A sua volta, l'etica della cura rivaluta il campo della filosofia morale, giudicato eccessivamente a favore di universali principi etici maschili quali: razionalità, auto controllo, e forza di volontà, proponendo il valore della cura per l'altro, intenso sia come essere diverso da sé, sia come l'ambiente che circonda il genere umano nella sua totalità. Tali contributi costituiscono una preziosa opportunità per rivalutare il benessere e la felicità in una nuova ottica che va oltre il perseguimento individuale della 'buona vita' per aprirsi a dimensioni sociali e collettive.

***Keywords*****:** Felicità, Benessere, Homo Oeconomicus, Homo psychologicus, Economia femminista, Etica della cura

## 2.1 Introduzione

Se analizziamo le principali personalità che negli ultimi decenni sono state insignite del premio Nobel nell'ambito della ricerca economica, notiamo che questo importante riconoscimento è stato assegnato principalmente a quegli studiosi che hanno saputo integrare, o comunque rinnovare, conoscenze del proprio specifico settore di appartenenza con i contributi provenienti da altre discipline. Il premio è stato assegnato, ad esempio, all'economista Amartya Sen, nel 1998, per avere introdotto dal campo dell'etica nuove nozioni di benessere economico basate su concetti di uguaglianza e libertà e per aver saputo trovare parametri connessi alla realizzazione di dimensioni oggettive come: nutrizione, longevità, salute, istruzione etc.

Un altro economista, Gary Becker, ha ottenuto il medesimo riconoscimento nel 1992 per aver esteso la ricerca economica a nuovi ambiti disciplinari, come ad esempio la sociologia, che in precedenza non erano stati presi in considerazione perché non ritenuti influenzabili dai fattori economici e per aver inoltre introdotto il concetto di "capitale umano", ovvero quell'insieme di conoscenze, competenze, abilità, emozioni, acquisite durante la vita di un individuo e finalizzate al raggiungimento di obiettivi sociali ed economici singoli o collettivi.

Mohammad Yunus nel 2006, pur ricevendo il premio Nobel per la pace, ha ottenuto tale riconoscimento soprattutto per la sua attività di carattere finanziario, volta a sottrarre le persone alla miseria attraverso appunto una nuova visione della finanza basata sul concetto del "microcredito", ovvero il prestito bancario concesso specificamente ai diseredati.

Ancora, Elinor Ostrom, la prima, e al momento l'unica donna ad essere stata insignita del prestigioso riconoscimento nel campo dell'economia nel 2009, lo ha ottenuto per aver trovato una terza via tra Stato e Mercato, nel campo della gestione dei "*commons*", i beni comuni, ovvero quelle risorse che non appartengono ad uno specifico proprietario e che per loro natura possono quindi essere condivise da tutti, a patto che esse non vengano sfruttate fino al deterioramento. Si può ben immaginare quanto, in un mondo sempre più globalizzato i "*global commons*" descritti dalla

Ostrom, come il clima, il world wide web o gli oceani, assumano un valore fondamentale (Ostrom, 1990).

Da questo brevissimo excursus di riconoscimenti, possiamo anche notare come il comitato del premio Nobel sembri riconoscere sempre più il valore della ricerca che in forma innovativa affronta i temi problematici della società contemporanea: le difficoltà così come le opportunità rappresentate da un mondo sempre più incline alla globalizzazione, la gestione dei beni comuni appena accennata, l'integrazione tra sfera razionale ed emotiva in un campo, quello dell'economia, da moltissimo tempo dominato dal concetto della razionalità assoluta.

In questo ultimo caso, si inscrive il più recente lavoro di Daniel Kahneman. Anch'egli premio Nobel nel 2002 per l'economia, ma allo stesso tempo psicologo di stampo cognitivista, Kahneman è stato insignito del prestigioso riconoscimento proprio per aver dimostrato, attraverso una serie di esperimenti condotti con il suo collega Amos Tversky, che i fattori psicologici, sia cognitivi che emotivi, influenzano fortemente le nostre scelte economiche (Kahneman, Slovic & Tversky, 1982; Kahneman & Tversky, 1974). Da anni Kahneman, inoltre, conduce le sue ricerche verso le modalità d'interazione tra il pensiero immediato e la capacità di riflessione, e della loro influenza sulle scelte individuali, come ben descritto nella sua ultima pubblicazione "*Thinking fast and slow*" (2011). In tal senso, il suo invito, come economista e come psicologo, è quello di integrare la sfera emozionale e quella razionale.

## 2.2 La crisi dell'*homo oeconomicus* e di quello *psychologicus*

Nonostante il merito di questo autore nel trasporre i contributi della nostra disciplina all'interno del sapere economico, non possiamo tuttavia fare a meno di notare quanto questo tentativo di integrazione abbia seguito una strada a senso unico. Per essere più precisi, è stata l'economia, fino ad ora, ad aver inglobato nel suo campo i contributi provenienti dalla psicologia e mai viceversa. Seppure tale integrazione abbia costituito un grande arricchimento per il sapere economico, ciò non è sufficiente per comprendere i profondi mutamenti che stanno interessando la nostra società e di cui non possiamo assolutamente ignorare la portata. Non basta, quindi, dimostrare che la psiche abbia una certa influenza sui comportamenti economici - con il risultato che lo stesso Kahneman

(2011) ha dichiarato che nonostante le sue ricerche abbiano messo totalmente in crisi il concetto di *economicus man* quest'ultimo rimane ancora il caposaldo dell'economia neoclassica - ma è necessario utilizzare altri contributi del sapere psicologico, utili ad ampliare il raggio d'azione e di conoscenza, a vantaggio sia dell'economia sia della psicologia stessa.

È necessario, quindi, un incontro tra le due discipline all'interno del quale possa avvenire un reciproco dialogo e scambio di conoscenze e di strumenti, al fine di giungere a una nuova e più complessa comprensione dei fenomeni sociali e della natura umana in generale. È sicuramente vero, bisogna ammetterlo, che questi due campi del sapere tendono troppo spesso, invece, a dialogare solo all'interno degli stretti ambiti disciplinari di loro appartenenza, venendo a mancare in tal modo ogni messa in comune di strumenti e risultati (Diener, 2009). Se l'economia, ad esempio, discute di fattori oggettivi legati al benessere, le discipline psicologiche, sembrano poco interessate a tali aspetti. Se la psicologia, invece, analizza variabili più soggettive, l'economia le ignora e continua a concentrarsi eccessivamente su indicatori statistici e misurazioni standard (Arcidiacono & Di Martino, 2016).

La realtà, tuttavia, non manca mai di presentarsi in tutta la sua evidenza. In entrambi i settori, è divenuto ormai più che ovvio che, sia l'*homo oeconomicus,* il quale persegue la massimizzazione del profitto, sia quello *psychologicus,* il quale ricerca benessere esclusivamente soggettivo, sono entrambi in profonda crisi.

La psicologia, nel prendere in considerazione lo studio della felicità, ha continuato a misurare la soddisfazione di vita in relazione a come l'uomo la percepisce, tramite indicatori quali: le emozioni positive, quelle negative, i giudizi soggettivi sulla propria vita in generale e su domini specifici in particolare come: famiglia, lavoro, tempo libero (Diener, 2000).

In questo quadro, potremmo dire, estremizzando un po' i termini, che *l'homo psychologicus*, impegnato nella ricerca della felicità, è misura di sé e risponde principalmente a se stesso; per lui non contano connessioni sociali, contesti istituzionali, condizioni politiche. Tale modello tuttavia non costituisce il riferimento di ricercatori e studiosi che fanno riferimento alla psicologia Critica e di Comunità (Prilleltensky, 2005; Fryer, 2012, Kagan, Burton, Duckett, Lawthom, & Siddiquee, 2011), come vedremo più avanti.

Allo stesso modo, tra gli economisti si sta diffondendo sempre più la convinzione che focalizzare l'attenzione solo sui fattori di natura economica non basta, soprattutto se si considera quanto l’accrescersi del PIL, utilizzato quale principale indicatore del benessere, non costituisca automaticamente garanzia di altrettanto ben vivere.

Infatti, da quando negli anni Settanta Richard Easterlin coniò il famoso paradosso che porta il suo stesso nome è diventato alquanto evidente che a livello nazionale la felicità è scarsamente influenzata dal denaro. Secondo gli studi del famoso economista, la correlazione tra reddito pro capite e felicità nazionale segue l’effetto di una parabola rovesciata. Il denaro incide sulla felicità solo fino a una certa soglia, superata la quale cessa di costituire un ulteriore incentivo e vira precipitosamente verso il basso.

Per dirlo con altre parole, non appena si supera il livello minimo di sopravvivenza, ossia quella soglia necessaria di benessere economico che assicura la soddisfazione dei bisogni primari, un ulteriore incremento economico può risultare completamente inutile o addirittura negativo ai fini della felicità (Easterlin, 1974). Numerosi studi, successivi a quelli di Easterlin, hanno messo in discussione la validità assoluta del famoso paradosso (Veenhoven & Verguns, 2014; Hagerty & Veenhoven, 2003). Pur tuttavia essi restano concordi nell’accettare il principio generale che, soddisfatti i bisogni primari, ovvero raggiunto un livello di vita dignitoso, l’accrescere del benessere economico smette di costituire un altrettanto incentivo per la felicità (Ahuvia & Friedman, 1998; Cummins, 2000; Diener & Oishi, 2012). Da quanto finora descritto, emerge la necessità di aprire la ricerca sociale a nuove interpretazioni della realt**à**, a differenti ambiti disciplinari e alle possibilità, così come alle sfide, che tale scelta richiede.

Al fine di arricchire le discipline economiche e psicologiche impegnate sul fronte della felicità, in questo capitolo presenteremo i contributi provenienti da una terza disciplina, ovvero il movimento del femminismo contemporaneo. Nello specifico, la nostra discussione si focalizzerà su due aspetti in particolare proposti da tale corrente di pensiero: la critica dell'economia femminista di rivalutazione/superamento dell'uomo economico (e l’approccio a un nuovo modello rappresentato *dall’homo reciprocans*) e la proposta della filosofia femminista, proveniente in particolare dal campo della filosofia morale, di adottare nuovi valori etici basati sul principio della cura.

Nelle pagine a seguire esploreremo infine in che modo questi due particolari contributi possano essere associati ad una innovativa visione di felicità e benessere.

## 2.3 L’economia femminista: i principi per un'altra economia

Dagli anni Settanta del secolo scorso, all’interno della disciplina economica, economisti ed economiste che si riconoscono nel movimento del femminismo contemporaneo, hanno iniziato a rivalutare la propria disciplina di appartenenza, ritenendola eccessivamente incline verso valori maschili e con al centro, di conseguenza, l’uomo e le sue scelte (Woolley, 1993). La concezione economica criticata riguarda, in particolare, una visione androcentrica che ha contribuito ad una marginalizzazione (e a volte addirittura ad una piena esclusione) sia teorica sia effettiva del pensiero femminile dall’ambito accademico in generale e da quello economico in particolare (Gibson & Graham, 2006; Ferber & Nelson, 2003).

Marilyn Waring (1998), autrice del famoso volume ‘*If women counted’,* considerato da molti un classico in tale ambito di studio, afferma in tal senso:

“*La professione dell'economia è composta da un gruppo limitato di privilegiati, universitari, uomini bianchi. Essa non né al servizio della maggioranza dell’umanità né del nostro fragile pianeta. La sua struttura e i suoi contenuti servono invece un disegno e un’ammaliante propaganda*” (p. 45).

Un esempio chiaro di come l’economia mainstream considera limitatamente la questione del genere è rintracciabile negli approcci econometrici. Infatti, quando l’economia prende in considerazione il genere negli studi quantitativi, lo fa riducendone la complessità a una variabile ‘di controllo’, ovvero ad una variabile inserita nell’equazione statistica per spiegare se certi elementi sono influenzati o meno dall’appartenenza a un determinato genere. In tal senso, l’approccio convenzionale dell’economia ignora i processi relativi all’appartenenza al genere femminile e come questo interagisca e influenzi le forze sociali e istituzionali (Figart, 2005).

Dal momento che l’economia classica è principalmente focalizzata su elementi “ontologicamente maschili” come: interesse personale, autonomia, astrazione e logica, il movimento dell’economia femminista ha iniziato a richiedere appunto la riproposizione di elementi maggiormente “femminili” come ad esempio: connessioni, emozioni, rapporti intrapersonali, mostrando quali problemi creino all'economia l'esclusione di tali argomenti e, allo stesso tempo, i vantaggi che ne deriverebbero dall'adottarli (Peterson & Lewis, 1999 p. 362).

La visione dell'economia classica nell'escludere gli elementi del femminile sopra citati è finalizzata al mantenimento dello *status quo* in cui l'uomo è al centro del mondo o, per meglio dire, è 'il centro' del mondo. Il fine dell'economia femminista è, invece, quello di rivedere tale assunto proponendo appunto una diversa concezione di essere umano che vada, oltre l'uomo economico.

Scopo fondamentale è quindi la presa in considerazione dei contributi del femminile nella gestione dei processi economici, politici, educativi, istituzionali al fine di proporre una nuova scienza economica. In tal senso, come afferma Julie Matthaei:

"*Negli ultimi 40 anni sono stati fatti progressi notevoli. Il concetto di discriminazione di genere ha rimpiazzato l'idea di una divisione naturale dei compiti e l'imposizione di ruoli economici rigidi in base al sesso è, ad oggi, considerata per lo più inaccettabile. Grazie al supporto dei movimenti femministi, le donne si sono fatte strada tra i lavori a forte prevalenza maschile, compresi quelli di prestigio, e con i programmi di microcredito le capacità imprenditoriali femminili sono state riconosciute in tutto il mondo e in particolare nei paesi poveri*" (2009, p. 2).

Allo stesso tempo, però, questa autrice sottolinea come in questi anni l'esperienza abbia mostrato anche i limiti della capacità di liberazione e acquisizione di potere delle donne nel momento in cui esse sono costrette ad accettare i ruoli correnti dell'*attuale gioco economico* (Matthaei, 2009).

Con tale espressione l'autrice intende l'insieme di regole che gestiscono gli ingranaggi e i meccanismi economici che muovono la società e tali regole prevedono, appunto, che valori maschili, quali: autonomia, pensiero analitico, astrazione, logica etc. siano considerati prevalenti su quelli ritenuti femminili, che, al contrario, si esprimono in: connessione, empatia, pensiero divergente, cura, etc. A causa di circostanze storico-sociali, tali valori sono stati per moltissimo tempo ritenuti "deboli", e pertanto non capaci di sostenere il peso della società (Ferber & Nelson, 2003).

La segregazione occupazionale, e il *glass ceiling* sono solo due dei numerosissimi esempi che, rivelano le regole del "gioco economico", a cui uomini e donne sono sottomessi nella nostra società (Peterson & Lewis, 1999; Maume, 1999; Bergmann, 1974). Come già accennato, infatti, queste regole sono parte integrante del modo in cui, in generale, i processi economici, sociali e culturali influenzano lo stile con cui decidiamo di condurre le nostre vite. Di conseguenza esse hanno un peso importante nel dare forma alle teorie economiche stesse le quali, basandosi principalmente sull'osservazione di come gli esseri umani agiscono, tentano poi di analizzare, spiegare e a volte anche di prevedere, le scelte che questi ultimi decidono di mettere in atto.

L'economia femminista si distingue per la critica mossa sia a tali regole sia alle teorie economiche che su di esse si basano nonché per la proposta di vie nuove e alternative (Kuiper, Sap, Feiner, Ott, & Tzannatos, 1995), . Secondo Baker e Feiner (2004) cinque criteri contraddistinguono l'economia femminista, ovvero: a) l'interesse verso la promozione di eguaglianza, soprattutto per coloro che non hanno accesso a risorse, come l'inserimento nel mercato del lavoro, b) l'economia dovrebbe promuovere la qualità della vita e il benessere, in termini di salute, educazione, tempo libero, e ottimali condizioni lavorative, c) attenzione alla sicurezza economica, d) focus sull'impatto che l'economia ha sull'ambiente esterno, in quanto produttore di rifiuti e consumatore di risorse, infine e) la capacità dell'economia di creare opportunità lavorative che diano senso al lavoro dell'essere umano (p. 2).

Seppure non esista una lista esaustiva dei principi di base su cui si fonda l'economia femminista (come il primo punto della lista seguente riporta), Schneider e Shackelford (1998) hanno stilato dieci punti che si oppongono alle precedenti tassonomie dell'economia neoclassica e, allo stesso tempo, tentato di riassumere il pensiero di quella femminista, configurandosi come un tentativo di "antidoto" ai problemi causati dall'adottare esclusivamente un punto di vista "maschile". Questa lista è stata recentemente rivista e proposta come un "*memorandum per le femministe e gli educatori economici eterodossi che si trovano a dover maneggiare standard economici e lise predefinite*" Schneider & Shackelford, 2014, p. 80). I dieci punti sviluppati da Schneider e Shackelford sono i seguenti:

- Non può esservi una lista definitiva dei principi dell'economia femminista
- I valori entrano nell'analisi economica attraverso molteplici livelli
- Le attività familiari sono un punto centrale per quelle economiche
- Le attività al di fuori del mercato sono economicamente rilevanti
- Le relazioni di potere sono importanti per l'economia

- Una prospettiva di genere è centrale per lo studio economico
- Gli esseri umani sono creature complesse e sono pertanto influenzati da molti fattori, non solo quelli materiali
- Le persone competono, cooperano e si curano l'uno dell'altro
- Le azioni di governo possono migliorare le condizioni del mercato
- Lo scopo dell'economia deve essere interdisciplinare

## 2.4 La visione del benessere e della felicità nell'ottica dell'economia femminista

Nell'analizzare il complesso costrutto della 'qualità della vita' Siri Naess (1999) distingue tre approcci. Il primo, il criterio soggettivo, concerne l'esperienza dell'individuo in merito a come vive la propria vita. Il secondo criterio è invece oggettivo e riguarda le risorse al quale l'individuo può accedere o meno. Il terzo approccio, combina i due precedenti e focalizza l'attenzione su aspetti quali abilità fisiche, interazioni sociali, fattori economici e status, e benessere psicologico. Dei tre approcci alla qualità della vita, l'autrice suggerisce di investigare con più attenzione il primo in particolare, ovvero l'approccio soggetto.

Accanto ai segnali che indicano il tramonto dell'*homo oeconomicus*, si associano altri, più recenti che indicano come i principi proposti dal femminismo economico possano trovare piena espressione. In tal senso la proposta dell'economia femminista si avvicina ai più recenti filoni di pensiero che tentano di promuovere un'idea di essere umano che sia appunto interdipendente nel suo rapporto con il mondo circostante, attraverso l'adozione di modelli più olistici che includano allo stesso tempo principi quali ad esempio: responsabilità, fiducia, rispetto e reciproca collaborazione (Becchetti, Bruni & Zamagni, 2010; Becchetti, 2009; Layard, 2005).

Cosi come la prospettiva dell'economia femminista, tali contributi propongono fondamentalmente l'idea che gli esseri umani non debbano necessariamente essere considerati concorrenti nella lotta per la vita, ma possano al contrario darsi la mano e aiutarsi vicendevolmente. In tal senso, la proposta è di una diversa *Weltanschauung* in cui la ricerca della felicità e del benessere vadano oltre il mero accumulo di beni materiali, ma siano basati piuttosto su di un accumulo di ricchezza relazionale che si esprime in una rete di supporto e rispetto reciproco.

È questo un principio che l'economia più recente esprime nel concetto di *relational goods*, beni relazionali, ovvero quei particolari tipi di beni che possono essere usufruiti solo in relazione agli altri (Uhlaner, 1989) e che, per la loro capacità di connettere gli individui al mondo degli scambi positivi, rivestono un ruolo fondamentale nel perseguimento della felicità. (Becchetti, Bruni, & Zamagni, 2010; Becchetti, Pelloni & Rossetti, 2008; Bruni & Stanca, 2008).

L'economia classica, al contrario, non solo ha mancato di analizzare i *relational goods*, ma più in generale, ogni elemento non strettamente rientrante all'interno delle attività di mercato. Fanno parte di questa categoria, ad esempio, tutti quei lavori non retribuiti che, molto spesso, e sicuramente non a caso, ricadono sulle donne, come: l'allevamento della prole, la cura della casa e del nucleo familiare, il lavoro nero etc.

Tutto questo deve portare a riflettere sul modo in cui l'economia valuta la vita su e di questo Pianeta, e ad agire di conseguenza per modificare tale visione (Nelson, 2003). In tal senso, la proposta avanzata del femminismo economico, si avvicina anche ai più recenti contributi provenienti sia da altri settori interni all'economia come la *green economy* (Hahnel, 2010), l'economia della solidarietà (Borzaga & Ianes, 2006), l'economia umanistica (Bruni, 2012; Kahneman, 2011; Sen, 1999; Layard, 2005), e quella della felicità (MacKerron, 2012; Powdthavee, 2007; Graham, 2005a,b; Easterlin, 2004) sia da movimenti esterni ad essa come il pensiero della decrescita (Demaria, Schneider, Sekulova, & Martinez-Alier, 2013; Latouche, 2009), e l'etica della cura, come vedremo più avanti (Held, 2006; Noddings, 2003), sia, infine da discipline come la psicologia Critica di Comunità, come vedremo nel prossimo capitolo (Prilleltensky, 2012; Fox, Prilleltensky, & Austin, 2009; Kagan et al., 2011) solo per nominarne alcuni.

Tali contributi rappresentano sicuramente un inizio per la creazione di nuove politiche sociali interessate non solo alla ricchezza materiale, ma anche e soprattutto, al benessere dei cittadini. È necessario, tuttavia, operazionalizzare tali apporti in misurazioni e metri da poter essere utilizzati per verificare l'effettivo sviluppo di un Paese. In particolare, sviluppare indici robusti che siano chiari e ben definiti risulta di importanza cruciale (Graham, 2011).

Come afferma Lourdes Benerìa:

*"l'obiettivo è quello di porre le attività economiche al servizio dei cittadini e non l'opposto; sforzarsi di ottenere produttività ed efficienza che non siano finalizzati a se stessi, ma mezzi per incrementare il benessere sociale... Tutto ciò implica porre concetti di distribuzione, uguaglianza, etica, ambiente, felicità, benessere collettivo e cambiamenti sociali al centro del nostro programma*" (Benerìa, 2003 p. 128).

Tale esigenza richiama, di conseguenza, il ruolo svolto dalle istituzioni nel dare forma alle teorie economiche; ed è per tale motivo che l'economia femminista guarda con interesse a quei settori dell'economia che indagano il ruolo svolto dalle istituzioni nel costruire e favorire determinati comportamenti economici (Hamilton et al., 2006). Ciò fornisce all'economia femminista una visione più olistica e complessa dell'essere umano, rispetto a quella dell'uomo economico (Power, 2004).

## 2.5 Dall'homo oeconomicus all'homo reciprocans

Secondo Paula England (2003), la critica del femminismo si fonda sulla messa in discussione di quattro dei principi fondamentali su cui poggia l'economia neoclassica, ovvero:

- i confronti interpersonali di utilità sono impossibili
- i gusti sono esogeni rispetto ai modelli economici e non cambiano nel tempo
- gli attori sono egoisti
- mentre i menbri della famiglia, al contrario, agiscono altruisticamente

Questi assunti si fondano sul presupposto che gli individui siano "atomizzati", ovvero siano singole entità, non influenzabili dall'ambiente circostante, e "*self-interested*", cioè forniti di un Sé separativo, il quale a sua volta fonda la base del concetto di "*homo oeconomicus*" (idem). Questo termine, utilizzato per la prima volta da John Stuart Mill nel suo lavoro sull'economia politica (Persky, 1995), si riferisce a un modello di essere umano il quale presenta le seguenti caratteristiche: è essenzialmente razionale, motivato dall'interesse personale e spinto alla massimizzazione dell'utilità come consumatore e a quella del profitto come produttore (Rittenberg & Trigarthen, 2009).

Per rendere più comprensibile la figura dell'homo oeconomicus, Ulla Grapard (1995), lo paragona al personaggio di Robinson Crusoe, il protagonista del noto romanzo di Daniel Defoe. Infatti Crusoe mostra tutti i caratteri dell'uomo moderno, essendo egli bianco, borghese, colonizzatore, dominatore e sfruttatore del 'selvaggio' Venerdì.

Si può ben notare quanto tale visione dell'essere umano, decisamente egoista, interessato solo ed esclusivamente alla soddisfazione dei propri bisogni, incurante di quelli altrui, di conseguenza competitivo e avaro, nega l'interdipendenza e il suo valore nella costruzione del benessere; ed è per tale motivo che gli autori e le autrici femministe criticano fortemente tale modello ritenendolo inaccurato e non rappresentativo della complessità umana (Ferber & Nelson, 2003).

L'economia femminista si propone quindi, di rivedere l'idea dell'uomo posta al centro del dibattito economico, e non solo. Il suo messaggio si focalizza innanzitutto sulla questione che il ricorso sempre più ampio ai fattori economici per spiegare i comportamenti individuali e le scelte politiche dei governi ha portato a considerare la figura dell'*homo economicus* come realmente rispondente alle caratteristiche umane, dimenticando che si tratta di un'astrazione teorica utilizzata per spiegare in modo semplificato solo alcuni meccanismi economici. Questa visione ha poi portato come conseguenza ad astrarre l'idea stessa dell'uomo dall'ambiente in cui vive, al punto che potremmo dire, quasi paradossalmente, che l'*homo oeconomicus* è un individuo che "*interagisce nella società senza però essere influenzato dalla società*" proprio perché "*le sue interazioni passano attraverso un "mercato ideale*" (Nelson, 1995) e non nel mondo reale.

Economiste ed economisti appartenenti al movimento femminista mettono in discussione tale principio, affermando che l'essere umano vive in un mondo di relazioni e soprattutto la sua esistenza non deve necessariamente essere considerata come una concorrenza per la lotta della vita, ma che al contrario, quest'ultima possa fondarsi su cooperazione e fiducia, trovando negli altri validi alleati e fonti di supporto. Sono questi i presupposti che invitano ad andare oltre *l'homo oeconomicus* per adottare un modello di "*homo reciprocans*".

In effetti, che l'*homo oeconomicus* sia oramai un modello obsoleto per affrontare le sfide della modernità, è un dato quanto mai evidente anche in autori di differente orientamento, che tuttavia lo minano anch'essi fino alle fondamenta (Frey, 1997; Sahlins 2004; Tversky & Kahneman, 1974), ma anche e soprattutto da segnali trasmessi a livello socioculturale. Stiamo, infatti, attraversando una delle peggiori crisi finanziarie, economiche e sociali a cui il sistema di vita occidentale non è più in grado di fare fronte e il capitalismo, anch'esso fondato sull'idea dell'*homo oeconomicus*, sembra aver deluso del tutto le sue promesse; in particolare l'equazione: più denaro uguale più felicità per tutti (o quasi tutti), si è rivelata in buona parte fallimentare (Lane, 2001; Easterlin, 1974). Al posto del benessere augurato, infatti, i Paesi più avanzati hanno ottenuto una serie di mali sociali che l'opulenza raggiunta non è stata, affatto in grado di prevenire, né tantomeno di curare.

La critica femminista si caratterizza per il fatto di sottolineare quanto l'attuale sistema economico, oltre che essere profondamente in crisi, continui a prevedere una divisione dei ruoli e del potere in cui le donne in particolare e i valori del femminile in generale rimangono ancora sullo sfondo e danno spazio ai principi maschili sopra menzionati i quali a loro volta costituiscono la base dell'idea di *homo oeconomicus* (Ferber & Nelson, 2003).

Se si vuole, dunque, superare questo momento di crisi, per uscire da tale impasse, senza sacrificare il benessere sociale, bisogna puntare su un nuovo modello, tutto rivolto alla solidarietà e alla collaborazione tra le persone (Matthaei, 2009). Per fare ciò, è necessario approdare a una nuova visione della natura umana più ricca e in grado di affrontare la complessità stessa di un mondo sempre più in trasformazione.

L'*homo reciprocans*, è, appunto, un diverso prototipo di essere umano volto all'interazione e alla cooperazione con l'altro, all'interesse per l'ambiente di cui è parte, e alla volontà di premiare i comportamenti giusti e redarguire quelli sbagliati (Dohmen *et al.*, 2006). Persino esperimenti di laboratorio hanno confermato la critica *alll'homo oeconomicus* dimostrando che, molto spesso, i partecipanti si comportano maggiormente come uomini *reciprocans*, ovvero coinvolgendosi volontariamente in strategie interattive volte alla cooperazione, rispondendo ai comportamenti cooperativi degli altri mantenendo o addirittura incrementando la cooperazione stessa, e punendo gli egoistici comportamenti degli "scrocconi" anche a costo di una perdita personale, e anche quando non vi è alcuna sicurezza che, in futuro, tale azione apporterà loro un diretto vantaggio (Gintis, 200).

L’idea che la natura umana possa essere osservata da un’angolatura che preveda rispetto, fiducia e collaborazione verso l’altro, si associa di conseguenza a un imperativo morale che spinge gli uomini a prendersi cura a vicenda, facendo ricorso a quella che è stata definita, sempre da un gruppo di femministe contemporanee: l’etica della cura.

## 2.6 La necessità dell’etica

La necessità di reintegrare principi etici all’interno della disciplina economica è stata sottolineata fortemente dal premio Nobel Amartya Sen nel suo famoso testo “Etica ed economia” (Sen, 1987), divenuto ormai un classico della letteratura sia filosofica sia economica. Sen articola, nel suo volume, gli svantaggi derivati da un progressivo allontanamento della disciplina economica dal campo dell’etica e i possibili vantaggi che un riavvicinamento potrebbe di conseguenza comportare.

Uno dei concetti fondamentali che l’autoresostiene è il principio di “ottimo paretiano”, posto alla base della cosiddetta “Economia del Benessere”. In estrema sintesi, tale principio afferma che:

“*Una configurazione del sistema economico è ottimale se non è possibile migliorare la situazione di qualcuno senza peggiorare quella di qualcun altro*” (Pareto, 1848-1923).

Un’economia priva di etica può benissimo accettare l’idea di competizione, di massimizzazione del profitto e in generale di molti concetti caratterizzanti l’economia neoclassica, purché essi non entrino in aperto conflitto col principio di Pareto. In un’economia mossa da principi etici, invece, secondo Sen, uno Stato che voglia far rispettare contemporaneamente efficienza paretiana e liberismo, può al più assicurare a un individuo la garanzia dei suoi diritti (Sen, 1987).

Così come l’economia si è gradualmente distaccata dall’etica, allo stesso modo la psicologia ha anch’essa trascurato di considerare gli atteggiamenti e i comportamenti umani negli effetti che possono avere sugli altri. Il risultato per la psicologia è stato che, come afferma Isaac Prilleltensky:

"*Nonostante un certo interesse per il ruolo dei valori in campo psicologico, a questa disciplina manca tuttavia una precisa linea guida che possa definire le implicazioni morali delle proprie azioni*" (Prilleltensky, 1997, p. 538).

Da quanto detto finora, possiamo ricavare che, paradossalmente, sia da un punto di vista economico che psicologico, senza un'etica normativa che indichi all'essere umano cosa sia giusto e cosa non lo sia, un individuo potrebbe essere giustificato delle più abiette azioni purché queste siano coerenti con il perseguimento della propria felicità. Pur senza bisogno di andare così lontano, il perseguimento del piacere, dell'accumulo di denaro, della competizione nell'ambiente lavorativo possono benissimo venire accettati in una società che spinge gli individui alla lotta dell'uno contro l'altro e alla scalata al successo, dichiarando che otterranno in tal modo la felicità agognata e non è detto che molti di essi non dichiarino effettivamente di essere abbastanza soddisfatti della propria vita, ignari o consapevoli che le azioni che li hanno condotti al successo hanno avuto un impatto negativo sugli altri (Foley, 2010). Questo stato delle cose è appunto il risultato di un indebolimento dell'etica, soprattutto di un'etica che pone scarso interesse per ciò di cui gli individui dovrebbero curarsi (Annas, 1993).

Sembra chiaro a tal punto che la necessità di attingere ai valori etici, e in particolare a un'etica che spinga alla cura dell'altro, non dovrebbe riguardare solo l'economia, ma, forse ancora di più, dovrebbe interessare la psicologia, cioè la disciplina per lo studio dell'essere umano.

## 2.7 L'etica della cura: una visione alternativa

Quanto proposto in questo contributo, in linea con l'economia femminista, è dunque un'etica fondata sui principi della cura. Come vedremo, infatti, questo atteggiamento si avvicina a quelle esigenze di rinnovamento descritte precedentemente, proponendo una nuova visione dell'essere umano e dei suoi rapporti con il mondo circostante, nonché una nuova visione di felicità e benessere. La questione della cura è, infatti, un tema di grande rilievo all'interno del dibattito dell'economia femminista (vedi Steckley & Smith, 2011; Power, 2004; Folbre, 1995; Clulow, 1995). In particolare, come ci ricorda Fiona Robinson (2011):

"*nell'applicare in maniera critica al problema delle sicurezza dell'essere umano, l'etica della cura e le pratiche ad esse relative devono essere incluse nel più ampio cotesto dell'economia della cura globale… l'economia femminista, l'economia politica globale, e la sociologia, hanno con forza mostrato come e perché il lavoro di cura sottopagato e quello non pagato – lavoro che viene svolto principalmente dalle donne – invita a una rinconcettualizzazione delle teorie economiche, dell'economia politica globale, e della globalizzazione*" (p. 139).

In particolare O'Hara (2014), ha proposto tre principi di cura da applicare all'economia femminista, ovvero: a) riposo (rest), b) riparazione (restoration), e c) ricreazione. Il primo di questi principi, il riposo è in netto contrasto con i principi dell'economia neoclassica che ha trasformato gli essere umani in macchine per la produzione e consumo di merci. Riposare significa prendersi cura innanzitutto di se stessi, ma anche e soprattutto della sfera priva, dei legami familiari e amicali, e quindi per estensione del sociale.

Il secondo principio, la riparazione, va ben oltre il riposo. Riparare implica "*rinnovare la capacità di assorbire, attutire ed elaborare gli agenti stressanti e le emissioni che danneggiano le capacità e la salute degli individui, delle comunità e dell'ecosistema*" (O'Hara, 2014, p. 47).

La cura volta alla ristorazione, quindi, si esplica attraverso quelle attività che promuovono il benessere e la crescita individuale, social e ambientale. Tra queste, l'autrice suggerisce: cura della salute, terapie, esercizio fisico, ma anche connessioni sociali, networks supportivi, e impegno civico. In aggiunta a ciò, il focus sulla prevenzione è altrettanto importante, poiché essa interviene prima che le cause che richiedano interventi di ristorazione divengano salienti.

Infine, il terzo punto, la ricreazione, implica qualcosa che addirittura oltre la ristorazione, ovvero quelle capacità di essere creativi, innovare, e creare nuove idee. La cura volta alla ricreazione implica un processo che non si limita semplicemente allo 'svago' fuori dall'attività lavorativa, ma richiede un allontanamento momentaneo da quelle attività che prevengono la libera espressione della natura umana. Attività quali stare all'area aperta, ascoltare musica e fare attività fisica concorrono a supportare il principio di ricreazione.

## 2.8 Etica della cura: alcuni cenni storici

Come per l'economia femminista, il pensiero del femminile è stato a lungo escluso dall'indagine filosofica. Quest'ultima, infatti, è stata più volte criticata per aver assunto nei secoli un atteggiamento sessista (Schott, 2007; Nicholson, 1993). Lawrence Blum (1982), ad esempio, ha sottolineato come la filosofia di Kant e quella di Helgel esemplifichino un atteggiamento 'maschile' della pensiero filosofico in generale, basato su ciò che l'autore ha definito 'razionalismo morale' (moral rationalism), ovvero la visione dell' 'uomo giusto' rispondente a principi quali razionalità, auto controllo, forza di volontà, consistenza, principi universali che guidano il comportamento, e aderenza a obblighi e impegni. Valorizzando tali principi 'mashili', il razionalismo morale ha escluso altri fondamentali valori come simpatia, compassione, gentilezza, cura e attenzione per altri, e responsività, i quali appartengono principalmente alla sfera del femminile (Blum, p. 287-288).

Più in generale, alcune femministe, hanno sottolineato come l'aspetto emozionale dell'essere umano, è stato storicamente attribuito all'area del femminile; all'opposto, la sfera della cognizione è stata attribuita al maschile (Tuana, 1992; Held, 1987; Gilligan, 1982). Ne consegue che, in una società dove le emozioni soggiacciono all'egida del potere cognitivo, anche la filosofia tende a prediligere questi aspetti morali che più si associano al razionalismo e ad escludere quelli che sono più vicini al vissuto emotivo.

Questa visione, non è stata confinata solo all'ambito della speculazione filosofica; anche la psicologia è stata influenzata da una visione maschilista, in particolare, nello sviluppo delle teorie sulla morale (Kohlberg, 1981). Infatti, i primi studi nel campo dell'etica della cura furono condotti da Carol Gilligan (1982), principalmente in risposta alle teorie psicologiche di Lawrence Kohlberg sullo sviluppo morale del bambino. Gilligan affermò che il codice morale femminile nella teoria di Kohlberg fosse stato oscurato da quello maschile essendo basato principalmente sui principi della giustizia. Pertanto, l'autrice sviluppò una teoria alternativa del comportamento morale basata invece sul principio della cura (Gilligan, 1982) (Fig. 1).

Comparison of Gilligan's Morality of Care and Responsibility and Kohlberg's Morality of Justice

| | Morality of care and responsibility Gilligan | Morality of justice Kohlberg |
|---|---|---|
| Primary Moral Imperative | Nonviolence/care | Justice |
| Components of Morality | Relationships | Sanctity of individual |
| | Responsibility for self and others | Rights of self and others |
| | Care | Fairness |
| | Harmony | Reciprocity |
| | Compassion | Respect |
| | Selfishness/self-sacrifice | Rules/legalities |
| Nature of Moral Dilemmas | Threats to harmony and relationships | Conflicting rights |
| Determinants of Moral Obligation | Relationships | Principles |
| Cognitive Processes for Resolving Dilemmas | Inductive thinking | Formal/logical–deductive thinking |
| View of Self as Moral Agent | Connected, attached | Separate, individual |
| Role of Affect | Motivates care, compassion | Not a component |
| Philosophical Orientation | Phenomenological (contextual relativism) | Rational (universal principle of justice) |
| Stages | I. Individual Survival | I. Punishment and Obedience |
| | IA. From Selfishness to Responsibility | II. Instrumental Exchange |
| | II. Self Sacrifice and Social Conformity | III. Interpersonal Conformity |
| | IIA. From Goodness to Truth[a] | IV. Social System and Conscience Maintenance |
| | | V. Prior Rights and Social Contract |
| | III. Morality of Nonviolence | VI. Universal Ethical Principles |

Fig. 2.1. Differenze tra etica della giustizia (Kohlberg) ed etica della cura (Gilligan). Fonte: Brabeck, 1983.

Secondo Gilligan (1982), a differenza di quello maschile, infatti, il principio della cura, pone le sue radici nel terreno della responsabilità e delle relazionalità, invece che in quello dei diritti e delle regole. Inoltre la cura è inseparabile dalle circostanze in cui prende atto, piuttosto che essere un formale e astratto sistema di pensiero. Terzo, la cura è basata sulle naturali attività giornaliere piuttosto che su di un sistema universale di principi (Tronto, 1993). L'etica della cura è inoltre fondata sui concetti di reciprocità e responsabilità (Noddings, 2003, 1984), cosi come di empatia (Slote, 2007).

Come accennato, l’etica della cura fu inizialmente formulata in contrapposizione all’etica kantiana basata sui principi di giustizia, oggettività e astrazione da circostanze contestuali. Tuttavia, gli ultimi sviluppi in questo ambito di ricerca hanno ridotto il divario tra un’etica prettamente ‘maschile’ e una ‘femminile’ (Koehn, 1998) e reincorporato il concetto di giustizia nell’etica della cura[1] (Held, 1995; Tronto, 1993). Questo passaggio è stato supportato, tra le altre da Clement (1996), la quale ha sottolineato l’importanza di sostenere una equa e giusta distribuzione dei compiti di cura all’interno della società al fine di non relegare le donne nella sfera del familiare, della cura della casa e dei più deboli nella società.

## 2.9 Definizione e caratteristiche principali dell’etica della cura

L’etica della cura è un terreno di coltura molto fertile e nel corso dei decenni è stato arricchito da un gran varietà di contributi (Bowden, 1997). Una delle definizioni principali è stata fornita da Fischer e Tronto (1990), le quali definiscono, in una lettura estremamente ampia, l’etica della cura come:

“*un tipo di attività che comprende tutto ogni azione rivolta al mantenimento, contenimento, and riparazione del ‘mondo’ al fine di poterlo abitare nel migliore dei modi possibili. Per mondo, si intende il nostro corpo, noi stessi/e, e il nostro ambiente, tutti elementi che vanno intrecciati in una complessa rete di interazioni sostenibili*” (p. 40)

Altri autori e autrici hanno cercato di ridurre il focus su aspetti più specifici dell’etica della cura. Ad esempio Bubeck (1995), fornisce una visione dell’etica della cura centrata sui rapporti di interazione e dipendenza. Secondo l’autrice, la cura coinvolge due soggetti, uno che si trova in uno stato di bisogno – e che non può provvedere da solo/a – e l’altro che può provvedere a tale condizione. Sulla stessa linea di pensiero si colloca il contributo di Hamington (2004), il quale inquadra la cura in termini contestuali e relazionali. Infatti, l’autore definisce l’etica della cura come

[1] La stessa Carol Gilligan (1986), in risposta ad alcune critiche al suo volume ‘In a Different Voice’ aveva avanzato una proposta di integrazione tra l’etica della cura e della giustizia.

"*un approccio alla morale personale e sociale che sposta considerazioni etiche sul contesto, le relazioni, e conoscenza affettiva… la cura è volta alla crescita e realizzazione degli individui, e tuttavia essa riconosce la nostra interconnessione e interdipendenza*" (p. 3)

Oltre a diverse definizioni del concetto di cura, il dibattito se questo tipo di etica sia da considerarsi maggiormente come una 'pratica' o una 'virtù' è ancora aperto. Selma Sevenhuijsen (1998), ad esempio, considera la cura come 'pratica sociale' che può essere generata anche da motivazioni non necessariamente virtuose. La cura, infatti, potrebbe essere fornita, in certe circostanze, per esercitare un controllo sull'altro, o per appagare sentimenti di colpa, per obbligo o aspettative sociali. Purtuttavia, anche questo tipo di cura, non solo quella offerta per virtù, può condurre a risultati positivi, proprio come una cura virtuosa a volte potrebbe generare risultati negativi, come paternalismo o un eccessivo atteggiamento protettivo. Secondo Sevenhuijsen, ciò che conta nel definire l'etica della cura, è il risultato, non la motivazione che lo sostiene.

In linea generale, i principi fondamentali caratterizzanti questo tipo di etica possono essere riassunti in tre punti principali:

- Tutti gli individui sono interdipendenti l'uno con l'altro
- I più vulnerabili meritano particolare attenzione; e
- È necessario considerare gli aspetti contestuali di una data situazione in modo da salvaguardare e promuovere gli specifici interessi di coloro che vi sono coinvolti.

All'interno di questi tre principi 'generali', Joan Tronto (1993) identifica quattro sotto-categorie della cura, le quali possono essere considerate come stadi, 'disposizioni virtuose', ed obiettivi. Esse sono: 1) sollecitudine (attentiveness), ovvero un'attitudine a divenire consapevoli dei bisogni degli altri, 2) responsabilità (responsibility), ovvero la capacità di rispondere a  e prendersi cura di tali bisogni, 3) competenza (competence), ovvero quell'insieme di abilità atte a fornire cure adeguate, e infine 4) responsività (responsiveness), ovvero la considerazione verso la condizione altrui e la consapevolezza del rischio di abusi all'interno delle relazioni di cura.

Il primo elemento di questa serie di fattori è ben espresso in "*Caring, A Feminine Approach To Ethics & Moral Education*" nel quale Nel Noddings (1984) sostiene che la cura sia un processo intimamente legato ad una assunzione di responsabilità nei confronti dell'Altro. La cura, secondo l'autrice, non può essere concepita, infatti, come una mera serie di attenzioni rivolte solo al Sé, né tantomeno a quelle limitate solo ad un unico individuo, ma alla loro inestricabile interdipendenza. Secondo Groenhout (2004) la natura umana è, infatti, intrinsecamente legata all'interdipendenza (inderdipendence), personificazione (embodiment) e connessione sociale (social connectedness). È, infatti, mediante la cura verso il sé e cura verso l'altro che la sfera del privato si connette con quella pubblica (Barnes, 2012). Nella sua esplicazione, pertanto, il processo della cura coinvolge l'ambito del sociale e si aggancia, come a una serie di anelli, a tutti coloro che ad essa sono connessi, in ciò che può essere definita appunto come "la catena della cura". Tale approccio concerne il genere umano nella sua totalità, e insieme ad esso la natura e le forme di vita, così come  quelle inanimate, che ne fanno parte (Noddings, 1984).

In tal senso, un'etica basata sulla cura si avvicina ad altre discipline, sia all'interno del campo filosofico, come la più remota etica della reciprocità (Stace, 1937), sia a numerose e più recenti branche dell'economia come: la green economy (Hahnel, 2014), l'economia della solidarietà (Borzaga & Ianes, 2006) o concetti attuali come il la reciprocità (Bruni, 2008) e il rispetto e la conservazione dei *commons* (Ostrom, 1990).

La catena della cura, connette inoltre, gli esseri umani tra loro, pertanto non affida le sorti di un individuo alle attenzioni di un altro singolo, piuttosto alla comunità più ampia, innalzando in tal senso questo principio verso la sfera del collettivismo (Dalley, 1996). In questa prospettiva, i problemi, cosi come le relative soluzioni, vengono, quindi, affrontati in maniera sociale e gli individui che fanno parte della comunità sono chiamati, di conseguenza,  a rispondere tanto del proprio benessere che di quello altrui. Secondo Virginia Held (2006) è, infatti, solo all'interno di un network di relazioni di cura che si può richiedere giustizia, uguaglianza, e diritti sociali.

## 2.10 La felicità e il benessere nell'ottica femminista: successi ottenuti e traguardi ancora da raggiungere

I contributi appena presentati possono essere utilizzati per generare una visione innovativa della felicità e del benessere. Le economiste e gli economisti che si riconoscono nel movimento del femminismo contemporaneo, ad esempio, con la loro proposta di superamento dell'uomo economico, ci invitano a non focalizzare la ricerca della felicità su elementi strettamente economici (come il reddito) o teorici (come l'utilitarismo) e piuttosto su una costruzione multidimensionale del benessere che includa elementi quali: salute, educazione, empowerment e social status (Power, 2004). In tal senso è interessante notare la proposta di tale movimento di superare il PIL attraverso i contributi congiunti del femminismo e dell'approccio delle *capabilities* proposto da Amartya Sen e Marta Nussbaum (1993) che ha dato vita allo *Human Development Index* (Fukuda-Parr, 2003).

Come abbiamo già potuto verificare nelle pagine precedenti, la visione di superamento dell'uomo economico del femminismo trova riscontro in autori, che pur non dichiarandosi espressamente appartenenti a tale movimento richiedono allo stesso modo di andare oltre tale modello quale primo passo per adottare nuovi standard, più olistici, che includano: interazioni gruppali, reciprocità, solidarietà e responsabilità nei confronti dell'altro (Becchetti, Bruni & Zamagni, 2010; Becchetti 2009; Borzaga & Ianes, 2006; Layard, 2005).

Per quanto concerne l'etica femminista basata sulla cura, il contributo che possiamo ricavare da tale approccio è che anche la ricerca della felicità non può limitarsi unicamente alla sfera del privato, ma debba necessariamente aprirsi al mondo degli altri. Felicità personale si deve fondere allora con benessere sociale e non può che rivolgersi dunque all'interesse per l'ambiente, all'impegno nella politica, al dialogo con le istituzioni. In tal senso l'etica della cura è vicina alle proposte avanzate da quegli autori che richiamano il contatto del benessere con la vita pubblica come Bruno Frey e Alois Stutzer (2002), Prilleltensky (2005), Neil Thin (2012), Richard Layard (2005).

Un secondo elemento che la prospettiva della cura insegna è che la nostra felicità è condizionata tanto dal modo in cui trattiamo noi stessi che da come ci rivolgiamo agli altri. Che la soddisfazione di vita fosse "contagiosa", ovvero, che potesse diffondersi in positivo agli altri, era già noto (Christakis & Fowler, 2009), ma che essa fosse condizionata alla cura che rivolgiamo al mondo esterno oltre che al nostro sé, è un elemento di innovazione che dovremmo prendere in seria considerazione quando analizziamo la felicità, sia da un punto di vista individuale che collettivo e sociale.

Tuttavia, dobbiamo sottolineare che i passi da fare, affinché tali contributi possano essere accolti ed utilizzati in tutto il loro potenziale, sono ancora molti. Innanzitutto, la visione della cura necessita ancora di essere pienamente accettata e per ottenere questo è necessario liberarla da una concezione maschile che la vede ancora come "fardello" sociale di cui le donne sono supposte essere le uniche portatrici (Dalley, 1996); Tronto, 1993). Quando non considerata come 'fardello', la cura è pur sempre coperta da quella che Bowden (1997) ha definito 'aura di invisibilità', ovvero un'attitudine a dare per scontato che la cura delle relazione intime, del familiare e del comunitario siano qualcosa che passa inosservato, in quanto parte 'naturale' del vissuto delle persone e, di conseguenza, non pertinente all'indagine filosofica, psicologica, e scientifica in generale.

Il modello di cura originario, ovvero quello della madre verso il proprio bambino, a cui alcune femministe si ispirano (Noddings, 1984: Held, 2006; Ruddick, 1989) è stato fortemente criticato per l'idea che trasmette di maternità e di cura come destino/obbligo della donna e non come scelta volontaria slegata dall'appartenenza a un determinato genere (Sevenhuijsen, 1998). Inoltre, l'etica della cura, come ha sottolineato Card (1990), cela il rischio di 'sfruttare' coloro che si assumono compiti di cura all'interno della società. La replica a tali critiche evidenzia che ciò corrisponde a un modello di riferimento e non ad una normativa a cui la donna deve sottomettersi e che l'etica della cura ha un carattere 'liberatorio' piuttosto che 'sfruttatore' poiché attribuisce i compiti di cura sia agli uomini sia alle donne in egual misura (Noddings, 1990).

Tuttavia, l'etica della cura, proprio perché ripropone il valore della attività "femminile" di cura può essere paradossalmente ritorta contro la donna, per confermare ancora una volta ruoli stabiliti da una società maschilista-patriarcale in cui la cura degli altri è affidata/imposta alle donne, senza che a questo corrisponda una altrettanta acquisizione di diritti e posizioni in altri ambiti del sociale (Tronto, 1993). Il nostro scopo dovrebbe essere, allora, quello di liberare tali concetti, partendo da un rifiuto dello status quo. Infatti, accettare un modello di organizzazione sociale a doppia morale dove la cultura della cura è assegnata alle donne senza che a questo corrisponda un'effettiva presenza femminile nella proprietà e gestione delle risorse, così come nei processi decisionali, vuol dire riconoscere il valore della cura, ma allo stesso tempo bandirlo dal mercato degli scambi sociali (Arcidiacono & Di Martino, 2011).

Inoltre la cura deve essere liberata anche dallo stretto ambito della speculazione filosofica in cui molto spesso si colloca, estraniandosi in tal modo dalla prassi nel mondo reale (Tronto, 1993). In tal senso, un tentativo di applicare i principi della cura alle istituzioni e alla politica di un Paese è stato messo in atto in Canada da Olena Hankivsky (2004) che ha utilizzato tali principi per migliorare le politiche sociali della sua Nazione. Questo caso si configura come un esempio di superamento del divario rappresentato dalla speculazione filosofica in materia di etica della cura, e appunto la sua applicazione pratica nel mondo quotidiano.

Inoltre, è bene notare che una serie di movimenti sociali basati sulla promozione dei principi della cura, stanno lentamente emergendo. In tal senso, un lavoro fondamentale è stato svolto da Hamington e Miller (2006) nel raccogliere tutta una serie di contributi rivolti all'applicazione dell'etica della cura alle istituzioni e alle politiche sociali, nonché a temi etici di grande attualità come donazione di organi, matrimoni tra coppie dello stesso sesso, giustizia ristorativa, politiche di welfare etc.

Per quanto concerne l'economia femminista, anche quest'ultima necessita ancora di essere pienamente riconosciuta, non solo dalla mainstream economica ancora dominante, la quale accetta ancora come caposaldo il modello di homo oeconomicus - nonostante numerosi autori abbiano minato le sue fondamenta da più direzioni dimostrando il valore della reciprocità nelle società arcaiche (Sahlins 2004), mettendo in discussione il principio della razionalità assoluta (Tversky & Kahneman, 1974), o quello delle motivazioni estrinseche come unico incentivo (Frey, 1997).

Nonostante l'economia femminista sia stata riconosciuta ufficialmente come una valida area di ricerca (Peterson & Lewis, 1999) la visione dell'homo economicus domina ancora l'idea della natura umana in tale campo di ricerca. Un esempio è dato dal fatto che, seppure "Feminist Economics Today: Beyond the economic man", volume che ha segnato una tappa fondamentale nel campo della economia femminista, abbia riscosso un enorme successo, anche al di fuori del suo campo di appartenenza, tanto da essere ristampato in una nuova versione un decennio dopo la sua prima pubblicazione, il suo contenuto e il messaggio che intendeva trasmettere è passato alquanto inosservato nell'ambiente accademico dominato dall'economia neoclassica e tuttora ancora molti degli argomenti discussi e delle proposte avanzate dagli autori e autrici femministi restano inascoltati (Ferber & Nelson, 2003).

È necessario quindi accettare una volta e per tutte che l'homo oeconomicus ha fatto il suo corso nella storia dell'economia, e che ora sia il momento di procedere vero altre direzioni e passare a una nuova concezione dell'uomo. Sicuramente la strada da percorrere è ancora lunga, ma i successi finora ottenuti indicano senza dubbio che la direzione intrapresa è nondimeno quella giusta.

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# Chapter 3:

## The Capabilities Approach and Critical Community Psychology: Contributions for Individual and Social Well-being


### Abstract

This chapter introduces two disciplines that over the past decades have been particularly committed to studying and promoting some of the principles advocated by contemporary feminism. The fist part of the chapter will be dedicated to the Capabilities Approach developed by Martha Nussbaum and Amartya Sen. This novel way of looking at well-being within a freedom and social justice framework holds the power to redefine our understanding of the good life. In addition to these, we will draw attention, in the last section, to the Critical Community Psychology approach to happiness and well-being. Our main argument is that this emerging discipline bears the potential to frame the pursuit of the good life in a whole new fashion that takes into account a) contextual features, in particular the recourses that a given environment offers and the opportunity to access them, b) the role of power, justice, and liberation, and c) the value of participation, reciprocity, and ethics of care. Current limitations of CCP are also discussed and future directions outlined.



***Keywords*****:** Capabilities Approach, Critical Community Psychology, Context, Social Justice, Ethics

## 3.1 Sen's and Naussbaum's Capabilities Approach

According to the Stanford Encyclopedia of Philosophy '*The capability approach is a theoretical framework that entails two core normative claims: first, the claim that the freedom to achieve well-being is of primary moral importance, and second, that freedom to achieve well-being is to be understood in terms of people's capabilities, that is, their real opportunities to do and be what they have reason to value*' (Robeyns, 2011)

In particular Sen's theory states that life consists in a whole of functionings, characterized by states of being and states of doing (Sen, 1999). The relevant functionings can vary from the very elementary - such as not being deprived of food, being healthy, preventing morbidity and premature death - to more complex states such as being happy or being integrated in the social community.

In his opinion, everyone implements functionings among those that are actually accessible and chooses the kind of life that is more attuned to the way he/she would like to live it. Sen's approach to functionings begs the question of 'when it comes to promotion and maintenance of well-being, which one do we need to value most between functionings and capabilities?' In Sen's opinion there is no doubt, capabilities comes first. In 'Commodities and Capabilities' (Sen, 1985) and 'Development as Freedom' (Sen, 1999) the Nobel Prize for Economy gives the examples of two people who are suffering from hunger. The first because is indigent and he hasn't got the resources to buy food while the other although, having resources required to buy the food, he chooses to strike in order to defend his values because he thinks they are necessary or because they are prescribed by his/her religion.

An assessment of the previous situation that focuses attention of functionings, leads to believe that the two agents are in the same condition, however an assessment that takes as a reference point the space of capabilities, considers that the first person is certainly worse-off than the first one. In terms of policy practices, when scarce resources are to be allocated, economic policies should be not directed towards someone who has chosen not to eat, but to someone who is unable to do it, due to his/her space of functionings.

Naturally, it is not easy take information from people about their opportunities. In practice it is difficult to restore the agent's opportunities/potentials set considering methodological and applied problems that should be addressed and overcome: from a methodological point of view, it is important to take into account the role of cultural traditions to convert a potential functioning in a concrete functioning, then regarding to application problems for example which method to follow to determine in concrete the capabilities of people (as interviews, objective observation, etc…). It is also possible to use information derived from agents' subjective perception about the type of choices that would be possible to do, and the conditions in which they are satisfactory. The last type of data is easier to be collected, but create trouble, difficulties, as highlighted by Sen, to confuse objective and subjective perspective.

In Martha Nussbaum opinion, "capabilities" can be understood both from Welfarism and Platonism point of view. Welfarism focuses on an individual's perspective; the choice depends on individual preferences to whther accpet or not any "public" intervention: if, for instance, women are 'willing' to accept violations to their rights, the problem is not existent. Platonism deduces from constructed categories such as "justice", the interventions to be carried out, regardless of the preferences of individuals. In that regard, Nussbaum also focuses on "informed wishes". Her idea, in its early stages was presented as a development of Sen's approach, on how she finds mediation between Platonism and Welfarism that her idea becomes Senian, in the justification that she gives in terms of life satisfaction within rights violation that makes Senian the argument. The space of opportunities is reduced for people who accept violence, freedom privations and discrimination.

## 3.2 Capabilities and Well-being

Amartya Sen's and Martha Nussbaum's Capabilities Approach represents a further contribution to an alternative understanding of happiness and well-being from a feminist perspective (Agarwal, Humphries, & Robeyns, 2005; Nussbaum, 2003; 2000). In terms of well-being, the relevant functioning developed by the Capabilities Approach can vary from the very elementary - such as not being deprived of food, being healthy, preventing morbidity and premature death - to more complex states such as being happy or being integrated into the social community (Sen, 2009; 1999; Nussbaum, 2003; 2011; Nussbaum & Sen, 1993).

This vision has led to the development of the Human Development Index, which sets out to gauge the level of human and country development by measuring three main dimensions, that is: Health, Education, and Living Standards. The index has been developed in the context of Governmental good practices aimed at promoting capability building hence human freedom. A graphical representation of the Index is shown below in Figure 1.

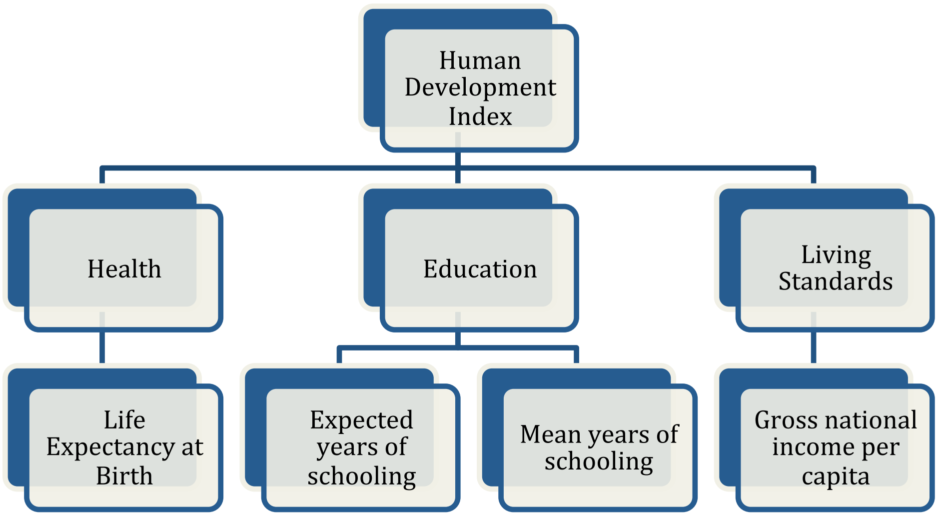


Fig. 3.1. Human Development Index Components

Martha Nussbaum's version of the Capabilities Approach is less strictly economical (Nussbaum 2003). One of the aspects that Nussbaum developed in contrast to Sen's approach is a list of 10 central capabilities (see Fig. 2). This list, which does not purport to cover the full range of capabilities in existence, includes aspects such as Life, Bodily Health, Body Integrity, Senses, Imagination, and Thought, Emotions, Practical Reason, Affiliation, Other Species, Play, and Control over one's Environment (Nussbaum, 2011).

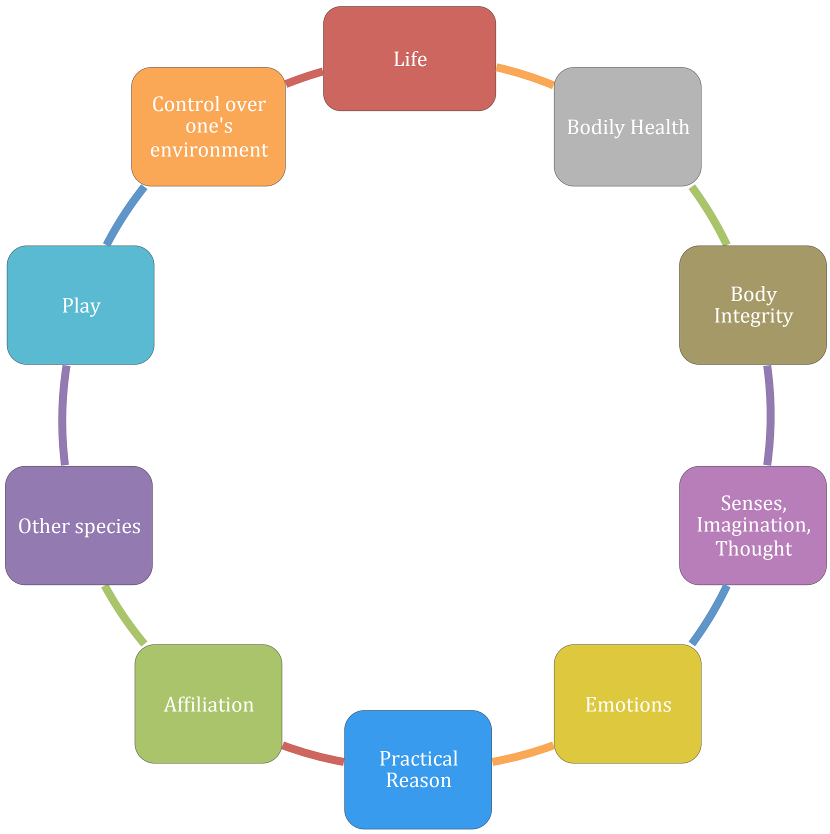


Fig. 3.2. Martha Nussbaum’s 10 Central Capabilities

A further important contribution from Nussbaum’s version of the Capabilities Approach, which is in line with the idea we are carrying forward, frames well-being and its promotion in a contextual perspective. Capabilities, in fact, could be provided from the above, regardless of the features of the context to which they are applied. Nussbaum, on the other hand, argues that “*contextualism is a desideratum for all approaches, but it has a particular affinity with the Capabilities Approach, which has always emphasized the importance of examining each person’s story in its social and historical context, in order to discern hidden obstacles to full capability*” (Nussbaum 2011, p. 176).

Despite their differences. both Sen’s and Nussbaum’s approaches promote an idea of development that should remove those obstacles standing in the way of human thriving and, at the same time, promote positive circumstances that enable people to do what they are able to do and to be what they are able to be (Claassen & Düwell, 2013). In that regard Gasper (1997) offers a useful scheme to understand how Sen’s and Nussbaum’s Capabilities Approach is related to the promotion of happiness, well-being, and quality of life

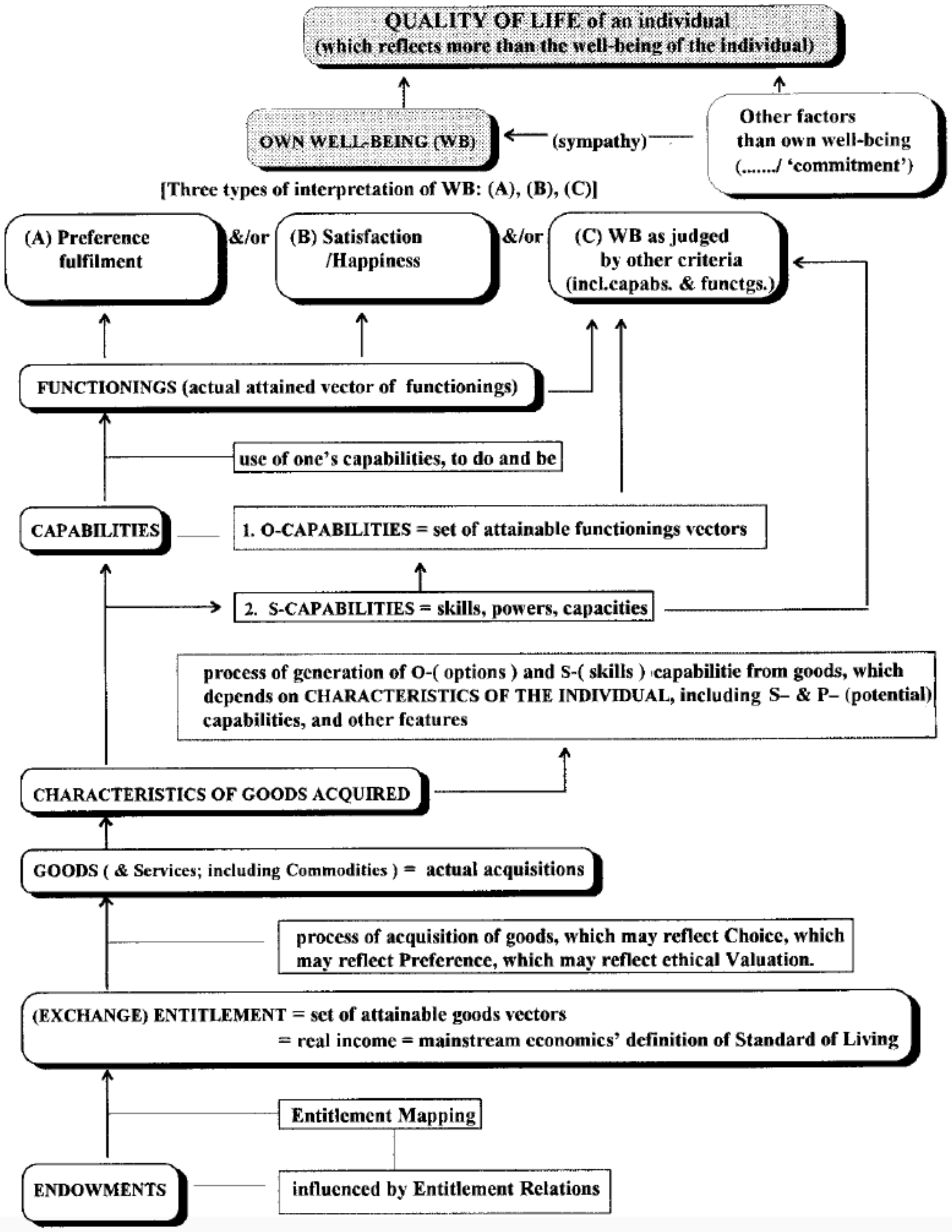


Fig. 3.3. From resources through to quality of life‹Sen's enlargement of micro-economics. Source: Gasper, 1997, p. 284

## 3.3 Advantages and Limitations of the Capabilities Approach

In “Development as Freedom”, Amartya Sen (1999) makes the case that the protective power of democracy to give people the opportunity to develop and express their capabilities can pass usually unnoticed unless a particular problem arises. When things starts “going downhill” the absence of a system that provides justice for everybody can loom extremely large and put a considerable strain on people’s lives.

If we transfer this concept from political economics to psychology, we notice that a preoccupation with intra-psychic dynamics and a misplaced emphasis on resilience have led researchers such as Seligman (2002) to ignore the effect of justice-related factors on well-being, such as income, education, and opportunities in life (Ehrenreich, 2009). In other words, a certain branch of psychology maintains that the external conditions or the context in which we live are immaterial as long as we draw upon our inner strength to enhance our well-being. This is one of the reasons why Positive Psychology has provided so many tools, techniques and practices geared to improve flow, character strengths, meaning and the like (Fredrickson, 2009; Seligman & Peterson, 2004; Lyubomirsky, Sheldon, & Schkade, 2005), while almost completely ignoring the paramount presence of the surrounding environment and its effect on the latter. In dealing with the phenomenon of post-traumatic growth, Seligman almost makes the case that anybody, once provided with the right psychological endorsement, can overcome life challenges and even gain a new purpose in life from negative events (Seligman, 2011). However, as Prilleltensky warns us that:

“*although it is quite true that human mind has great capacity for adaptation, and the human spirit has great powers of endurance, it is nonetheless a mistake to presume that most individuals can overcome adversity unscathed, or that external factors can be overcome by internal pirouettes of the mind. There is no question that some people, endowed with intelligence and empathy, can, with appropriate support, overcome adversity, but they remain a minority… For the vast majority of those who face oppression and injustice, however, life becomes a constant struggle”* (Prilleltensky, 2013, p. 149).

However, it must be noted that even the Capabilities approach has been under critiques for its person-centred evaluative nature (Gore, 1997). Despite being less individualistic than other approaches, the capabilities approach still relies on the individual judgment of personal achievements as well as freedom of choice. In Gore's words:

"*the goodness or badness of social arrangements or states of affairs is evaluated on the basis of what is good or bad for individual well-being and freedom and is also reduced to the good of those individuals*" (Gore, 1997, p. 242).

## 3.4 Critical Community Psychology: A New Vision of Happiness and Well-being

Following on from the contributions outlined above, we shall next explore, in great detail, the contributions of Critical Community Psychology (CCP) to happiness and well-being. We will place a great emphasis on this emerging psychological approach since we believe that CCP has more to offer to the promotion of good life that many other mainstream visions. First and foremost, CCP is highly committed to studying and promoting better life conditions from an ecological, value-based, and justice-oriented perspective (Nelson & Prilleltensky, 2010). Further to this, CCP shows a constant attention to linking the psychological features of individuals to those of the contexts that surrounds them. In fact, as Burton, Boyle, Harris, and Kagan (2007) have remarkably pointed out:

"*It is community psychology because it emphasizes a level of analysis and intervention other than the individual and their immediate interpersonal context. It is community psychology because it is nevertheless concerned with how people feel, think, experience, and act as they work together, resisting oppression and struggling to create a better world*" (p. 219).

Based on these premises, we will show the extent to which CCP bears the potential to redefine our current social, economic, and political system as well as to build new ways of living for both individuals and society at large (Natale, Di Martino, Procentese, & Arcidiacono, 2016). In particular, Critical Community Psychology is committed to the study and application of novel strategies of promotion of well-being based on:

- The value of social relationships, community life, and reciprocity;
- Sharing and participating as instruments for individual and social well-being;
- The ethics of care and the pursuit of justice as well as the overcoming of inequalities;
- Rethinking and redefining the relation between technology and environment, and;
- The achievement of new juridical principles for the construction and transaction of goods and resources

According to Prilleltensky and Prilletensky (2007) healthy communities

"*meet the needs of their constituents in ways that are congruent with certain values: selfdetermination, freedom, personal growth, health, caring, and compassion; accountability, transparency, and responsiveness to the common good; collaboration, democratic participation, respect for human diversity, support for community structures, and social justice*" (p. 235).

In the next section we will explore some of these points in detail. Our aim is to show the reader that there is a new way to explore happiness and well-being, and CCP is one of the disciplines that can lead the way.

With regard to that, we will present some of the key features of the CCP praxis (see fig. 3), which, in line with Kagan and Burton's vision (2001) include: a contextual perspective, and understanding of how justice, oppression, and liberation shape people's life, and the value of social interaction including participation, reciprocity, and care.

| *Element* | *Implication for community psychological praxis* |
|---|---|
| A just society and its underpinning values | A just society is one that is underpinned by shared values of justice, stewardship and community, and these same values should underpin our community psychological practice |
| Ecological metaphor | Community psychology looks outside the individual for explanations of social experience and sometimes for solutions, whilst at the same time viewing people as agentic, purposeful beings |
| Whole systems perspectives | Community psychology, so long as it recognizes the contradictions inherent in systems perspectives, has the potential for enhancing the supportive features of some (elements) of the systems in the interests of the people and for identifying the causes of oppression. |
| Interdisciplinary | A radical community psychology practice would seek interdisciplinary understanding about how oppression is caused and maintained, and use this understanding as a guide to appropriate action |
| Dialectical relationship between people and systems | Community psychological praxis may provide opportunities for enhancing the creative, determining potential of people |
| People's consciousness | Community psychology must work as near to the people as possible, and in participation with them in order to challenge the status quo and achieve social change |

Fig. 3.4. Elements of a radical community psychological praxis. Source: (Kagan & Burton, 2001, p. 11)

### *3.4.1 From the Individual to the Social and Contextual Perspective of Well-being*

In one of his recent films, entitled *To Rome with Love*, Woody Allen portrays the story of a would-be tenor endowed with an exceptional singing talent who, unluckily, can only produce it when soaping up in the shower. After a disappointing audition, owing to the absence of the only place where the man is able to perform well, his impresario pulls a rabbit out of a hat and lets him act his first opera show from within a shower cubicle. It goes without saying that the premiere, bizarre as it might appear, turns out to be an outstanding success, ensuring the singer a promising career. This funny story is quite a good example of how contextual features are able to influence human endeavours by fostering or, conversely, hindering personal competences. Under certain circumstances, the only way of enabling people to thrive by bringing out their full potential, as in the case of the 'tenor in the shower', is to change the surrounding context, not the individual psychological and/or biological make-up. However, even when context does not play such an overwhelming role, its importance should never be underestimated. Instead, we often fail to understand this fundamental principle and as a consequence, as Kloos and colleagues (2012) have remarkably put it, very often

"*Like a fish swimming in water, we take the contexts of our lives for granted… we tend to minimize ecological levels of analysis. Community psychologists try to understand the importance of contexts for people's lives and work to change the environments to be more supportive*" (p. 5).

In line with this vision, CCP considers happiness as neither the result of personal achievements, nor the outcome of national policies aimed increasing GDP or improving the welfare system; rather, it is a constant relationship between the resources and the opportunities provided by context – together with the community to which people belong –, and the best use they decide to make of them. In that regard, as Orford (2008) reminds us:

"*At the very heart of the subject is the need to see people – their feelings, thoughts, and actions – within a social context. It exhorts us, when thinking of people's health, happiness and well-being, or when thinking about people's distress and disorder, to 'think context'*" (p. XI).

From a Community Psychology perspective, to highlight the role of context entails taking into account at least three aspect: 1) happiness and well-being are situated in context. This means that first and foremost they run on a multi-systemic continuum that goes from the individual to society at large, passing through organizations and communities, and second that the promotion of the good life must draw on Sites, Signs, Sources, Strategies, and Synergy of well-being (for a review see Prilleltensky, 2005), 2) different contexts can contribute differently to well-being, in terms of the quality and quantity as well as objective and subjective resources they provide (Kagan & Kilroy, 2007), and c) to adopt a contextual perspective also means to acknowledge the role played by socio-cultural features (Uchida, Norasakkunkit, & Kitayama, 2013).

Therefore, in referring to context, and the role it plays in shaping people's life, we consider it in a very broad sense. In our view, context is comprised of set of opportunities and resources, networks of relationships, and both material and intangible features that make it the bedrock upon which people try to build a well-lived existence. It follows that context, as we intend it, is not the backdrop, but part and parcel of the very theatrical play in which social actors are to perform their lives.

In fact, CCP studies the interactions between individual and contexts, specifically taking into account relational, organizational, cultural, economic and political domains, both taken independently and in their reciprocal interactions (Prilleltensky & Arcidiacono, 2010).

Following on from the last points, Kagan & Kilroy (2007) provided a tool to understand how different community well-being indicators map onto qualitative and quantitative data, while tapping into material, social, economic, political, cultural and personal aspects of living. (Figure 4).

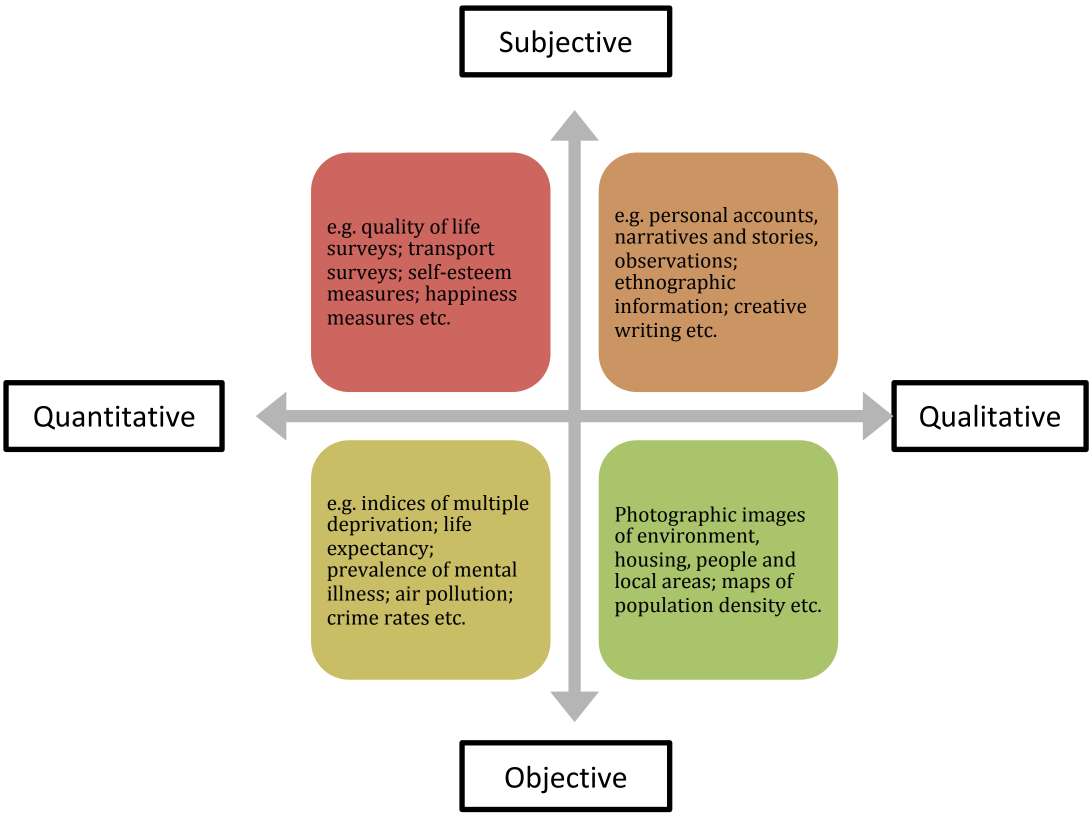


Fig. 3.5. Dimensions of well-being and of the community indicators. Source: (Kagan & Kilroy, 2007, p. 100).

Along the same line of thought, Isaac Prilleltensky's ecological model strives to understand well-being through a multilevel and multidimensional lenses through both objective and subjective measures of well-being (Prilleltensky & Prilleltensky, 2007). In that regard, the very definition that Prilleltensky gives us of well-being deserves to be quoted in full:

"*Well-being is a positive state of affairs, brought about by the simultaneous and balanced satisfaction of diverse objective and subjective needs of individuals, relationships, organizations, and communities*" (Prilleltensky, 2012, p. 4).

As already mentioned, Prilleltensky's ecological model offers a number of contexts of analysis (which the authors names 'sites' - of well-being), which are as follows: personal, interpersonal, organizational and communal. Furthermore, for each of them, the model provides physical, psychological, occupational, economic, community and interpersonal indicators, both subjective and objective. In addition to the 'sites', Prilleltensky's 5Ss model of well-being encompasses Signs, Sources, Strategies, and Synergy (Prilleltensky, 2005).

The author has expressed the advantages of his model in these terms:

"*We can integrate sites, signs, sources and strategies in the following formulation: The well-being of a site is reflected in a particular sign, which derives from a particular source and is promoted by a certain strategy… By using this simple formulation, we can integrate a vast amount of research in operational and actionable terms"* (Prilleltensky & Prilleltensky, 2007, p. 75).

Recently Prilleltensky and colleagues (2016) have also developed a multidimensional model of well-being, namely the ICOPPE model. This novel tool considers well-being as a multifaceted construct composed of seven domains, that is: Overall Well-being, Interpersonal Well-being, Community Well-being, Organizational Well-being, Physical Well-being, Psychological Well-being, and Economic Well-being (Fig. 5).


Fig. 3.6. The I COPPE model of well-being. Source: (Prilleltensky, 2016).

The ICOPPE model is also embedded in the contextual vision proper to CCP, according to which each well-being domain is placed on multi-level units of analysis, that is again: personal, interpersonal, organizational and communal (Prilleltensky, 2012).

To conclude, Kagan's and Kilroy's model as well as the ICOPPE model proposed by Prilleltensky and colleagues offer a new opportunity for CCP practitioners and other scholars to delve deeper into the complex nature of well-being from a contextual perspective.

### **3.4.2 *The role of Power, Liberation, and Social Justice***

#### 3.4.2.1 *Power and Liberation*

As we have shown in the previous pages, according to CCP the pursuit of well-being can be understood only with an ecological compass (Kelly, 1966). Once we assume that context is central to the understanding of human well-being, we can move on to embed more context-related contents such as social justice, inequality, power, and liberation, which are proper to the Critical Community Psychology approach (Kloos et al., 2012; Nelson & Prilleltensky, 2010; Orford, 2008).

Power, for instance might be used to generate oppression through a) control of resources, b) creation of barriers to participation, and c) agenda setting and shaping of conceptions through the creation of ideologies that perpetuate the status quo (Culley & Hughey, 2008). All of the above – and many other mechanisms used to uphold forms of oppression – are responsible of reducing people's life opportunities and their chances to enjoy a satisfactory life (Nelson & Prilleltensky, 2010; Montero & Sonn, 2009; Moane, 2003).

Oppression is intrinsically linked to Liberation, which is the process by means of which individuals and groups can break the chains of servitude to the hegemonic power (Martín-Baró, 1994). Various elements characterize Liberation Psychology, among which: consciousness, critical realism, de-ideologisation, a social orientation, the preferential option for the oppressed majorities, and methodological eclecticism (Burton & Kagan, 2005). However, analysing them all would go beyond the scopes of this introduction.

What we would like to point out here is a circular relationship existing between power, liberation, freedom, and happiness. Indeed, promoting and safeguarding people's freedom can be deemed to be a good ground for fostering happiness, and the pursuit of happiness is in turn a due step for making the most of freedom (Veenhoven, 2000; 2010). In this light, we argue that the principles of liberation and social justice can come to their fullness insofar as these are not limited only to the liberation from oppression (physical and psychological alike), but they extend their power to the active promotion of people's well-being and life satisfaction (Arcidiacono & Di Martino, 2012).

#### 3.4.2.2 *Social Justice*

One of the core principles of CCP has always been the promotion of social justice and social changes value-based praxes for the betterment of quality of life for both individuals and communities (Rappaport, 1984, 1977). In recent years this has taken a particular focus on the impact of social justice on well-being (García-Ramírez, M., Balcázar, & De Freitas, 2014; Campbell & Murray, 2004; Prilleltensky, 2001).

To include a viewpoint based on justice and fairness means ensuring at least three principles (Miller, 1999), that is: a) each person has access to the resources provided by social context with a fair and equitable allocation of burdens and privileges, rights and responsibilities, and pains and gains in society, (distributive justice) b) that everyone has the chance to register their opinion when it comes to decision-making processes (procedural justice), and c) that those who do not abide by the rules of societies should be punished accordingly, (retributive justice).

The fundamental role played by social justice allows us to go beyond the previous conception of well-being and happiness, according to which the individual is the only maker of his/her own life, to take up a new vision in which a well-lived life is the outcome of personal efforts that are interlinked with the opportunities provided by the environment (Prilleltensky, 2013, 2011).

At the same time, we must be mindful that social justice is still related to people's personal experience. Likewise, the extent to which we perceive what is fair and what is not is influenced by our surrounding social and cultural climates (Lucas, Zhdanova, & Alexander, 2012; Tyler, Boeckmann, Smith, & Huo, 1997). From a CCP perspective, this confirms once more the importance of constantly linking the individual experience to the surrounding context (Burton, Boyle, Harris, & Kagan, 2007). Therefore, the way CCP must explain the influence of social justice on well-being must take into account both the objective nature of fairness and its psychological-individual impact in terms of well-being.

Prilleltensky (2012), in his seminal paper 'Wellness as Fairness' has attempted to achieve such a goal by describing the relation between justice and well-being as a continuum that goes from 'persisting conditions of injustice', which generate 'suffering' to 'optimal conditions of justice', which conversely promote 'thriving'. From an ecological perspective, these psychosocial processes operate within and across personal, interpersonal, organizational and community contexts.

Based on this premise, Ledwith (2012) recommends considering at least three aspects when setting out to promote social justice, environmental justice, and collective well-being from a CCP perspective. Firstly, we must remember that we need an understanding of 'power' and its role in shaping an individual's psyche and behaviours. Framing human well-being in terms of how it is affected by a power differential, rather than the more abstract promotion of human rights, requires considering where power resides, as well as dealing with power imbalances, In other words, this means identifying which groups or individuals hold more power than others (Partridge, 2008; Prilleltensky, 2008). In this light, interventions aimed at promoting well-being and life satisfaction from a CCP perspective need to be assessed, among other criteria, on the basis of their psycho-political validity (Prilleltensky, 2003), which pertains to "*the role of power in wellness, oppression, and liberation at the personal, relational, and collective domains*" (Prilleltensky, 2008, p. 129). This invites us to delve into the mechanisms through which power is exerted to generate oppression. Is power used to control resources, create barriers to participation, set agendas, shape conceptions through the creation of ideologies that perpetuate the status quo, or a combination of all these (Culley & Hughey, 2008)? In this regard, as Prilleltensky argues "*power is never political or psychological; it is always both*" (2008, p. 116).

Secondly, our critical approach to social justice should always be grounded in a dynamic and dialectical alternation between theory and practice. Again, the integration of Critical and Community psychology offers a good solution to this task in that, as mentioned above, the former is highly action-oriented whereas the latter places a great deal of emphasis on challenging the status quo (Davidson et. al, 2006).

As a third point, practice, also understood as 'taking action', cannot only be a matter of individual interest. Viewed from a broader perspective, the purpose of liberation must be, in Montero's words, "*collectively and individually built, obtained, and won*" (Montero, 1994, p. 76). Collectivism also applies to assuring environmental justice for everyone, an aim that is endorsed by increasing demand for public participation in environmental decision-making (Spyke, 1999).

Prilleltensky's vision of well-being shares some common ground with the Capabilities Approach. The relationship between opportunities and justice and their role in determining well-being has, indeed, been thoroughly addressed by Amartya Sen (1999) in terms of the economic approach and Martha Nussbaum in terms of political philosophy. In Sen's and Nussbaum's view, enhancing development largely means removing the obstacles that stand in the way of human thriving and, at the same time, promoting positive circumstances that enable people to do what they are able to do and to be what they are able to be.

However, removing obstacles and promoting positive circumstances is not enough. We also need to prevent risks that might interfere with human development. As Amartya Sen claims, "*The challenge of development includes both the elimination of persistent, endemic deprivation and the prevention of sudden, severe destitution"* (Sen, 1999). In that sense, Community Psychology is very close to this vision since its concern is to promote well-being by preventing the causes of discomfort from arising (Kloos et al., 2012).

### 3.4.3 Values, Ethics, and Morality

As mentioned above, the matters of ethics and its importance for a happy and well-lived life has been extensively overlooked by the scientific literature on well-being[2], with an extent larger than the two previous topics discussed in this paper. As Sachs (2013) reminded us in the World Happiness Report 2013

"*We are now returning, step by step, to a broader conception of happiness. Yet I would argue that the ethicists are still mostly overlooked… modern ethicists, who are generally overshadowed in the public discourse, have not yet been successful in placing their subject back on the public agenda"* (p. 82).

The neglect of a value-based vision, that is the moral and ethical call for people to not only feel good, but also be good, can be attributed, at least in part, to the person-centred perspective that has been dominating hitherto the scientific arena around the good life.

In terms of moral life many approaches have stressed the capacity of individuals to display ethical behaviours through developing their inner features (see Peterson and Seligman's character strengths and virtues for example). Only a few (Frey & Stutzer, 2002; Prilleltensky, 2012; Sen, 1999; Nussbaum, 2011) have attempted to demonstrate that environmental circumstances are likely to either promote or hinder the development of moral life.

In terms of its relation with well-being, assuming an ethical, moral and value-based point of view means adopting first of all an eudemonic perspective, in that the pursuit of happiness is the outcome not only of a life of pleasure but also of a virtuous and value-driven life (Annas, 1993). Second, an ethical approach requires a sustainability-oriented viewpoint in order to ensure that no one achieves neither a greater amount of happiness nor a well-lived existence at the expense of other people, the environment, and future generations (Helliwell, Layard, & Sachs, 2013; O'Brien, 2008). These two pre-conditions open the way to the last one. In fact, pursuing a eudaimonic life while respecting and furthering the goods of others refer both to actively participating to civic

[2] philosophy stands out as an undeniable exception. This discipline, in fact, boasts a long-lasting tradition of study and reflection on happiness and well-being that traces back, at least in the history of Western thoughts, to the ancient Greece.

life. Indeed, what we mean to stress here is that not only good governments are assumed to provide higher levels of well-being to their citizens (Helliwell & Huang, 2008; Frey & Stutzer, 1999) - as a justice-oriented standpoint would rightly suggest – but it also true the opposite. Moral people who are engaged in a lively and active civic life contribute to the common good by improving the institutional performance of their government.

In a well-known study conducted by Nobel Prize laureate Robert Putnam, the 20 regions constituting the Italian geography and political administration have been tracked in terms of their institutional performance for over 20 years. Among many factors accountable for the good governance of regional governments, Putnam and colleagues (2003) found out that ethical and civic livelihood was the one with the heaviest weight. These finding are so self-consistent that Putnam has come to the final conclusion that "*The more civic a region, the more effective its government…*" (Putnam, 1993. p. 98).

Being a moral, law-abiding, trustworthy, and tolerant individual, or in other words, being a civic subject has both a direct effect on happiness and well-being – since the eudaimonic life, especially when combined with the hedonic one, brings about a higher lever of satisfaction and well-being – and indirect one. The latter concerns, in particular, its relationship with justice, equity, and the good functioning of administrative and democratic governments. Indeed, as we have shown in the previous pages, ethical and moral behaviours tend to thicken the social fabric and oil its engine. In other words, the well-being of governments, and ultimately, of society at large highly draws on morals-oriented citizens.

#### 3.4.3.1 *Reciprocity, the Ethics of care and Responsible Togetherness*

In one of his latest works on social status and inequality, Marmot (2004) pointed out the importance of autonomy and control over one's life and the opportunities for full social engagement and participation in determining health, well-being and longevity. However, Marmot's main point, in which we are particularly interested in this paragraph, is that "*as individuals we are concerned with what we can do for our own health. But we are also members of society… Cooperation, reciprocity and trust are also fundamental features of society*" (Marmot, 2004, p. 170).

Sociologists have often highlighted the recent increasing spread of unhappiness due to alienation and individualism of human beings in modern society (Bauman, 2008; Lane, 2000; Putnam, 2000). Yet, this shift in perspective also contributed to shed light on the value of social networks, as well as the set of rules and trust-based action that underpin them. These, in fact, hold the power to recreate a communal way of living and increase our life satisfaction and well-being as a consequence (Putnam, Feldstein, & Cohen, 2003).

The importance of reciprocity in ethical research is slowly making its way among people and governmental practices (Maiter, Simich, Jacobson, & Wise 2008), especially since these have been faced with all the discomforts generated from living in global and 'liquid' societies that a) force people to deal with systemic contradictions on an individual/personal level and b) shape the pursuit of happiness as acquiring material goods rather than constructing and maintain social bonds (Bauman, 2008; Kasser, 2002).

Within the field of civil economics, Luigino Bruni (2008) has proposed unconditional (or *gratuitous*) reciprocity, as opposed to 'conditionality', as "*an act (or strategy, in a repeated game) that is not conditioned to the reciprocating response of others at the level of the choice, but conditioned to the response of others at the level of the outcomes*" (p. 50).

In that sense, unconditional reciprocity is not simply 'altruism', which is an act of giving whereby he who performs it does not expect anything in return. On the contrary, although being always moved by self-interest, reciprocity is still affected by the other's response. In Bruni's words "*we say that those who adopt a strategy of unconditional reciprocity… will always cooperate, but their payoffs will depend on the strategies adopted by the other players with whom they are interacting*" (p. 51).

Other movements which are at issue with the principles of neo-classical economics, like the emerging movements of de-growth, are also paying particular attention to the value of living in societies based on reciprocity and conviviality for human well-being (Andreoni & Galmarini, 2014). Trainer clearly explains this transition to a new society when claiming that in a de-growth society *"we would share, give away surpluses, cooperate and volunteer. The commons would be part of the extensive communal wealth all would have access to… There would be far more community than there is now"* (Trainer, 2012, p. 590). In this regard CCP is an approach that is well equipped – in terms of vision, tools, and good practices – to promoting the principles that de-growth has theorized (Natale et al., 2016).

Indeed, one of the objectives of Community Psychology has always been shifting from individualist to more trust-based, cooperative, and collectivistic societies (Orford, 2008; Uchelen, 1999) in order to improve people's health and well-being (Campbell & Murray, 2004). In fact, as the literature has demonstrated, the presence of trust and collaboration in highly connected networks has a positive impact on the individual, organizational, and societal level (Tov & Diener, 2009).

For this to be attained, CCP suggests at least three collectivist good practices such as a) field control, the capacity to share control and power with the collective rather than basing them on an independent view of the self, and b) synergic community, a state in which a community becomes highly cohesive and members freely contribute psychological resources to the collective (Katz & Seth, 1987; Katz, 1984), and promotion of sense of community (Davidson & Cotter, 1991).

In this regard, CCP ethos is also very much attuned to the principles championed by the ethics of care. As shown in the previous chapter, the ethics of care is committed promoting the value of caring social interactions as well as morally acting in accordance to the principles of both justice and care (Di Martino, 2013; Held, 2006; Noddings. 1984). This commitment, which stems from placing the Self inside a complex environment of social exchanges, should be in fact closely linked to the capacity of being responsible and caring for the *Other*, which encompasses other human beings, animals, and more in general, nature and the earth (Noddings, 2005, 2003; Tronto, 1993).

In the perspective of CCP, reciprocity and care call for what Procentese, Scotto di Luzio, and Natale (2011) call 'Responsible togetherness'. As we stated elsewhere:

"*responsible togetherness implies an active involvement of individuals and social groups in local community life, in which members are expected to promote responsible actions as well as take part in a variety of social and community enterprises such as cultural, political, and sporting events*" (Natale et al., 2016).

Responsible togetherness implies that CCP has the potential to create those conditions in a society which fosters caring and reciprocal behaviours, in particular through the promotion of social trust, a shared social agenda, community building, and social actions directed towards the care and maintenance of social contexts (Procentese et al., 2011).

## 3.5 Final Remarks

However, the economic and psychological disciplines tend to exchange their view only within the narrowness of their research fields with a lack of shared tools and practices (Di Martino, 2013; Peterson, Park, & Seligman, 2005). Therefore, there is still work to be done in that direction. This is the reason why the second part of this introduction has been dedicated to the emerging contributions of Critical Community Psychology. In our challenging times, we argue that CCP will be an awareness instrument for the de-ideologisation, deconstruction and decolonization of psychology, contributing to a more critical approach to human sciences.

However, the valuable contribution CCP can bring to the arena of happiness and well-being, should be considered within the framework of some limitations as well as critical future directions. First and foremost, although as we have stated many times the extent to which CCP is committed to promoting happiness and well-being beyond the individual level, Burton and Kagan (2015) remind us:

"*Community psychology, despite its emphasis on units of analysis that are greater than the individual and the immediate interpersonal context, has produced relatively little theory for the societal level, either in terms of the societal construction of the individual and the group, or in terms of action frameworks for systemic, macro, or societal level change*" (p. 185).

In order to overcome what Burton (2015) defines as 'methodological individualism' we are called, as practitioners of happiness and well-being studies, to develop 'prefigurative action research' practices (Burton, Kagan, & Duckett, 2012). With this term Kagan and Burton (2000) emphasize "*the relationship between action research and the creation of alternatives to the existing social order*" (p. 73).

Since prefigurative praxis is both critical and action-orientated – which means it is orientated toward social change – its effect can be "*released into the wider society, and into community psychological praxis in a variety of ways, including through the lived experiences of those that participated, were challenged, grew or benefited in some way*" (Burton & Kagan, 2015, p. 186).

On the same line of enquiry, Christens and Perkins (2008) have redefined

Prilleltensky' ecological model by adding to it additional contexts of analysis (i.e. (physical, sociocultural, economic, political) as well as including new domains of well-being, including the notion of environmental wellness, which entails an understanding of macro-level environmental variables that affect human wellness. (p. 219).

Furthermore, despite the above-mentioned advancement in social justice, there is still a need for CCP to fully incorporate this concept within its theory and practice. Fondacaro and Weinberg (2002) pointed out that the field of CP is so imbued with the value of social justice as a normative concept that this has entailed a lack of commitment to "*rigorously reflect on the various ways in which the concept social justice is actually used both within and beyond the boundaries of scholarly discourse*" (p. 486). There is, in other words, a need for more theoretical and empirical studies on how to effectively promote social justice and exactly what kind of effect this has on people's well-being.

Likewise, as Sonn and Fisher (2001, 2003) pointed out, Critical Community psychologists need to be careful about how they conceptualize and tackle oppression. In particular, we need a better understanding of how context and culture enter into the analysis of power and liberation. The risks, otherwise, is to apply our liberatory principles in a universalistic fashion – with particular regard to the Western and North American worldview – that rules out the specific needs and cultural make-up of every context we work with (Fisher & Sonn, 2008).

Based on this critical account of CCP, what we need for the future is more empirical examples of how this approach intends to promote the values it advocates within a critical framework. In that regard, Fryer and Laing (2008) suggest a praxis according to which CCP should:

- strive to problematize ideologically reactionary aspects of mainstream 'knowledge and practice' (rather than collude with them),
- develop epistemologically sophisticated knowledgementing practices (rather than default to formulaic methodology),
- develop innovative socio-structural inter- and preventions (rather than default to traditional intra-psychic blame or change)
- collaborate with collectives (rather than work unilaterally on or for individuals),
- promote social change (rather than psychological adaptation)

- engage in emancipatory process and outcome through progressive redistribution of power (rather than collude with or contribute to oppressive (re) distribution of power)
- make processes of psychological oppression visible and contest them (rather than camouflage, mystify and collude with them)
- provide new legitimated knowledge, demonstrate new ways of producing knowledge which are participatory and socially just, and offer new ways to people to engage with us in emancipatory social research.

While being conscious of the limitations of CCP as well as of the necessary improvements we still need to apply to this approach, we believe that its ethos holds the power to advance our comprehension of human wellness. Given that the best societies are the ones offering the largest array of life opportunities for people to thrive, we believe that CCP is well positioned to discover solutions to both old and new problems concerning contemporary society. In this introductory work we have attempted to provide some examples of CCP applications in the happiness and well-being domain, in the hope that others will make good use of them to build better societies based on the principles that CCP is advocating.

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# Studio 1:

# HappyApp, un nuovo strumento per misurare benessere e felicità in una prospettiva di genere


## Abstract

Questo studio si pone l'obiettivo di indagare il benessere e la felicità in una prospettiva di genere. Partendo dalla critica che Martha Nussbaum ha diretto verso gli attuali metodi di misurazione di tali costrutti, in questo lavoro sarà presentato uno strumento che si propone di superare le attuali limitazioni della rilevazione di soddisfazione di vita e benessere collocandole in una visione contestuale. La HappyApp consiste in una application per Iphone e Android, costruita in modo tale che i rispondenti possano, a fine giornata, valutare sia la loro giornata sia aspetti specifici relativi ad ambiti importanti della propria esistenza. Una lista di 19 componenti della felicità è stata sviluppata, sia in italiano sia in inglese, basando la scelta degli indicatori sull'analisi della letteratura scientifica sul benessere e sulle valutazione effettuate da un campione di soggetti, sia academici, sia persone estranee all'ambito scientifico. Sviluppi e risultati attesi dall'utilizzo della HappyApp saranno discussi e nuove prospettive di ricerca delineate. In particolare, lo studio propone di utilizzare la HappyApp per apportare nuovi contributi al dibattito scientifico sul benessere in una prospettiva di genere. Scopo finale di questo studio è di offrire una visione del benessere e felicità che sia più vicina alle reali esigenze delle persone e che, quindi, possa fornire dati più precisi per estimare la propria qualità di vita.



***Keywords*:** Felicità e benessere, Happyapp, Dimensioni del benessere, Contesto, Experience Sampling Method, Latent Growth Analysis

## 4.1 Introduzione: Benessere e Felicità: definizioni e misurazioni

Il well-being e la soddisfazione di vita sono divenuti di recente oggetto di interesse da parte di numerose discipline quali antropologia (Johnston et al., 2012; Thin 2012), psicologia (Seligman, 2011; Haidt, 2006; Diener, 2000; Keyes, 1998; Ryff, Singer, 2008), sociologia (Veenhoven, 1984, 1993, 2012), filosofia (Haybron, 2008, Annas, 1993), scienze della salute (Powers and Faden 2006), politica (Bok 2011; McGillivray and Clarke, 2006), ed economia (Layard, 2005; Frey and Stutzer 2002; Graham, 2011; Bruni and Zamagni, 2007), per citare solo alcuni dei principali ambiti teorici che maggiormente hanno contribuito a definire e promuovere gli studi in tale settore. La crescente attenzione che queste discipline e, in tempi recenti, anche le politiche sociali stanno attribuendo allo studio e l'analisi del benessere e della soddisfazione di vita, invitano i ricercatori a provvedere definizioni e strumenti sempre più accurati per rilevare e analizzare tali fenomeni (Stiglitz, Sen, Fitoussi, 2009; Dolan, Layard, Metcalfe, 2011).

In questo quadro teorico, il termine felicità, sebbene molto usato nei diversi ambiti disciplinari, rischia spesso di creare confusioni e sovrapposizioni tra differenti dimensioni concettuali (Cummins, 2013). Un'ampia letteratura, ad esempio, fa riferimento al concetto di soddisfazione di vita ancorando tale definizione alla valutazione di alcuni parametri oggettivi (Venhoveen, 1984, 1993). Un altro filone, che caratterizza gli studi Keyes (2008), distingue tra benessere soggettivo e sociale intendendo con il primo una valutazione della percezione soggettiva della propria vita e con il secondo il modo in cui le persone si collocano e valutano il loro posto all'interno della società. Un ulteriore filone, rifacendosi al concetto di eudamonia proposto da Aristotele, tende a focalizzare l'attenzione sulla dimensione del senso e sulle potenzialità dell'essere umano nel ricercare benessere e felicità (Ryff, 1989; Ryff and Singer, 2008).

In ogni caso se la prima esigenza del ricercatore è definire la dimensione concettuale che sta esaminando, emerge anche la necessità di fornire idonee misure del concetto definito. A tal fine, la ricerca scientifica ha sviluppato una gran varietà di strumenti per la misurazione del benessere e la soddisfazione di vita sia al micro-livello (vedi Jarden, 2011; Lyubomirsky, King, & Diener, 2005) sia al macro-livello (vedi Dolan, Peasgood,

& White, 2008). Tuttavia, questi ultimi, seppur utili per la rilevazione della felicità individuale, non sono privi di bias, come ben vedremo nelle pagine seguenti.

## 4.2 Misurazioni della Felicità: ostacoli e opportunità

La misurazione della felicità, intesa come valutazione globale della qualità della vita di un individuo, risulta alquanto discutibile a causa di una sostanziale mancanza di accordo tra i ricercatori su quali siano gli elementi ultimi che compongono tale visione di benessere (Cummins, 2013). Di conseguenza, le dimensioni indagate, non sempre sono in accordo con la letteratura scientifica, come è evidente, ad esempio, nel caso delle critiche rivolta all'Oxford Happiness Questionnaire (Kashdan, 2004). Quest'ultimo, infatti, rispetto alla sua versione prevedente, the Oxford Happiness Inventory (Argyle, Martin, & Cross- land,1989), ha incluso elementi quali autostima e auto-accettazione i quali non sono univocamente accettati come elementi del benessere soggettivo (vedi Lyubomirsky, 2001).

Le misure condotte attraverso strumenti self-report hanno subito numerose critiche, in quanto vari studi hanno mostrato quanto le risposte possano essere distorte da ciò che il soggetto prova al momento della compilazione del questionario o dallo stato d'animo dei rispondenti dovuto a variazioni contestuali (come trovare una monetina da un centesimo prima della compilazione del questionario), o addirittura dalle condizioni metereologiche, come una 'bella' o 'brutta' giornata (Schwarz, 1987; Schwarz & Clore, 1983; Schwarz & Strack, 1999) così come il periodo dell'anno della somministrazione e la presenza o meno di altre persone durante quest'ultima (Kavetsos, Dimitriadou, & Dolan, 2014).

Tuttavia, il maggiore ostacolo probabilmente posto dai questionari self-report riguarda la natura stessa della domanda di ricerca. Come più volte accennato, partendo dalla definizione di soddisfazione di vita fornita da Ruut Veenhoven, in genere, tali strumenti cercano di rilevare quanto un individuo si senta soddisfatto della propria vita nella sua totalità, attraverso domande del tipo: "*Quanto ti senti soddisfatto della tua vita in generale*?" (British Household Panel Survey, BHPS), e "*Quanto sei soddisfatto della tua vita in questi giorni*?" (World Values Survey, WVS). Questo approccio, seppur utile per una valutazione globale del benessere soggettivo, cela il rischio di oscurare aspetti specifici della vita di un individuo. Come Martha Nussbaum ha evidenziato:

"*Alle persone viene semplicemente detto che devono aggregare diversi tipi di esperienza in un'unica risposta… essi non hanno alcuna opportunità di rispondere qualcosa del tipo "Beh, a livello di salute sto bene, e il mio lavoro va bene, ma sono alquanto preoccupato per ragioni finanziarie, e uno dei miei amici è gravemente malato"… il fatto che le persone debbano rispondere a una tale domanda difficilmente dimostra che questo sia il modo in cui effettivamente esse esperiscono la propria vita*." (Nussbaum, 2012, p. 339).

Infatti, secondo l'autrice, è necessaria una prospettiva contestuale nella misurazione e promozione del benessere. Come sottolinea nel suo famoso saggio 'C*reatining Capabilities: The Human Development Approach*':

"*Un prospettiva contestuale è desiderabile in qualsiasi approccio, ma essa ha una particolare affinità con l'approccio delle capabilities, il quale ha sempre enfatizzato l'importanza di esaminare la storia di ogni individuo collocandola nel suo contesto social e storico…"* (Nussbaum, 2011, p. 200)

Alla critica della Nussbaum, si aggiunge che, il concetto di benessere soggettivo, o felicità, è influenzato da variabili temporali e dai cambiamenti che un individuo esperisce nel corso della sua vita (Kim-Prieto, Diener E., Tamir, Scollon, & Diener M., 2005). In linea con questa visione del benessere soggettivo, come hanno dimostrato Mogilner, Kamvar e Aaker (2011), il significato che le persone attribuiscono al concetto di felicità non è fisso, ma tende a cambiare nel corso del ciclo di vita. Analizzando più di 12 milioni di blog su internet, e in particolare le co-occorrenze associate alla parola 'happy', gli autori, hanno raggiunto la conclusione che, quando si è giovani si tende a concepire la felicità con emozioni relative alla frenesia, eccitazione, divertimento, mentre con il divenire adulti e poi anziani, si tende ad associate alla felicità concetti di tranquillità, pacatezza, serenità.

## 4.3 L'Ecological Momentary Assessment

Al fine di superare tali limitazioni, migliorare la validità ecologica, e collocare la rilevazione del benessere soggettivo all'interno di una cornice contestuale, sono stati proposti una serie di metodi che, date le opportune differenze, fanno capo all'Ecological Momentary Assessment (Shiffman, Stone, Hufford, 2008).

Tra questi, il Day Reconstruction Method (DRM), per esempio, rileva il modo in cui le persone decidono di trascorrere il proprio tempo e come esse esperiscono varie attività giornaliere ricostruendo le esperienze della giornata precedente. In particolare, viene fornito ai soggetti un questionario strutturato composto da una descrizione dettagliata di un giorno particolare della vita dell'intervistato (Kahneman, Kreuger, Schkade, 2013).

A tal scopo, si richiede di rievocare i ricordi collegati al giorno precedente scrivendo un breve diario in forma di episodi. Infine, gli intervistati forniscono una descrizione dettagliata di ogni episodio indicando quando è iniziato e finito, cosa stavano facendo, dove si trovavano, chi erano le persone con cui stavano interagendo e, ovviamente, il grado di coinvolgimento edonico. Si potrebbe obiettare che in questo modo ci si affida nuovamente ad un resoconto retrospettivo e ai limiti del sé che ricorda e che valuta, tuttavia richiamando alla memoria episodi specifici questo metodo si riesce a ricavare ricordi sufficientemente accurati, molto simili a quelli che si otterrebbero attraverso un' introspezione diretta, e quindi molto fedeli alla esperienza effettiva del Sé che vive e sperimenta. Secondo Kahneman e i suoi collaboratori (2004), uno studio eseguito con il metodo dalla ricostruzione giornaliera riesce a replicare senza variazioni apprezzabili un modello di oscillazioni di affetti ottenuto con il metodo del campionamento dell'esperienza. Tuttavia, come Diener e Tay (2014) ci fanno notare, il Day Reconstruction Method necessita di ulteriori studi volti a verificarne le qualità psicometriche.

Un altro strumento che si prefigge di superare i problemi dati dai questionari sulla soddisfazione globale come le imprecisioni della memoria, l'indifferenza alla durata e le influenze culturali, è l'Experience Sampling Method (ESM). Come ci fanno notare Hektner, Schmidt e Csikszentmihalyi (2007) "*ESM combina la validità ecologica dell'osservazione naturalistica con la natura non intrusiva dei diari e la precisione delle scale di misura basate su questionari*." (p. 7).

ESM consiste nel fornire ai soggetti un diario elettronico che permetta, in alcuni momenti distribuiti casualmente durante la giornata, di descrivere che cosa stanno facendo e di indicare l'intensità dello stato d'animo. I dati così possono essere raccolti e trasformati in medie e generare un valore numerico che possa rappresentare l'effettiva esperienza di una giornata o di parti di essa. Questo metodo è molto preciso, coglie esattamente le sensazioni vissute nel corso del tempo, tuttavia, presenta un difetto non trascurabile: richiede molte risorse non solo economiche, e risulta in pratica abbastanza complesso per essere applicato a campioni molto ampi di popolazione.

ESM è uno strumento per la raccolta di informazioni sul contesto e il contenuto delle azioni giornaliere degli individui. Tale obiettivo è condiviso anche da altri metodi, tuttavia lo speciale vantaggio di ESM risiede nella sua capacità di catturare gli aspetti della vita di tutti i giorni cosi come essa viene percepita da un dato momento fino alla sua successiva rilevazione, fornendo in tal modo la possibilità di esaminare fluttuazioni nel flusso di coscienza e il legame tra il contesto esterno e i contenuti della mente.

Tale metodo riesce a raggiungere un tale grado di immediatezza poiché' richiede ai soggetti di fornire una serie di risposte a domande sia aperte che chiuse durante vari momenti di ogni giorno della settimana, ogni qual volta un dispositivo sonoro (un cercapersone o un Palmare) li invita a rispondere. Le domande possono essere totalmente costruite attorno agli interessi e gli obiettivi del ricercatore, ma di solito esse includono interrogativi che si focalizzano su contesti fisici (luogo, ora del giorno), sociali (numero e descrizione di coloro che condividono tale momento con il rispondente), attività, pensieri, sentimenti, così come valutazioni cognitive e motivazionali.

Come ci ricordano Scollon, Kim-prieto, e Diener (2009) ESM fornisce almeno cinque vantaggi: 1) permette ai ricercatori di comprendere meglio le contingenze del comportamento umano. 2) porta la psicologia fuori dal laboratorio di ricerca e la trasferisce nella vita reale, in tal modo incrementando la validità ecologica dello studio. 3) permette l'analisi di processi intra-individuali. 4) Grazie a ESM i ricercatori possono evitare alcuni degli inconvenienti associati all'uso dei questionari self-report, come bias dovuti al richiamare certi eventi alla memoria e l'uso di euristiche globali (come discusso sopra nel caso della felicità), e infine 5) risponde all'esigenza di impiegare multi-metodi per lo studio di fenomeni psicologici. (Scollon, Kim-prieto, & Diener, 2009).

### 4.3.1 *L'Experience Sampling Method e le sue varianti*

L'Experience Sampling Method presenta, in linea generale, tre varianti: l'interval-contingent sampling, l'event-contingent sampling e il sampling signal-contingent sampling (Reis & Gable, 2000; Scollon et al., 2009). L'Interval-contingent sampling si basa sulla compilazione di un questionario self-report ogni qual volta un segnale avvisa il soggetto. Il segnale può essere inviato una sola volta nell'arco di una giornata o a intervalli regolari (es. un report ogni numero di ore). Nel caso dell'event-contingent sampling, si richiede ai partecipanti di compilare un questionario self-report a seguito di un particolare evento di interesse (es. dopo una certa interazione sociale). Il signal-contingent sampling è, tuttavia, il più diffuso e il più praticato tra gli Experience Sampling Methods. Tale metodo consiste nel mandare un segnale ai partecipanti allo studio in momenti casuali della giornata per diversi giorni o settimane (Hektner, Schmidt, Csikszentmihalyi, 2007). In merito alla scelta della variante più adatta Hektner, Schmidt e Csikszentmihalyi forniscono le seguenti linee guida:

"*Nel delineare uno studio ESM i ricercatori devono decidere per quanti giorni dovranno chiedere ai partecipanti di riportare le loro esperienze e quante volte durante la giornata questi dovranno essere avvisati dal segnale. Sia la durata che la frequenza del segnale possono essere totalmente adattati agli obiettivi dei ricercatori… Un periodo di tempo di una settimana (sette giorni) è quello che personalmente abbiamo usato più spesso. Tuttavia vi sono studi che sono durati anche solo tre giorni (Hurlburt, 1979) ed altri che sono durati diverse settimane o addirittura mesi"* (Feldman, Barrett, 1998; LeFevre, Hendricks, Church, & McClintock, 1992).

## 4.4 Smartphone e misura della felicità

Più di recente, l'ampio uso di nuove tecnologie per la comunicazioni, quali ad esempio gli smartphone sta aprendo opportunità interessanti per sviluppare la ricerca sulla felicità e rispondere alle esigenze sopra indicate.

Il mercato degli smartphone ha assistito ad un incremento a dir poco esponenziale negli ultimi decenni. A fine 2014 in Italia si prevedeva una vendita di ben 14,5 milioni di nuovi device[3] e nel 2015 le vendite sono continuate a salire di 12.3%[4]. Sistemi sempre più potenti da un punto di vista computazionale e in termini di connessioni sono oggi alla portata di tutti. Basti pensare che la potenza di un iPad 2 oggi è di gran lunga superiore al più potente supercalcolatore disponibile nel 1985, ovvero il Cray-2, un calcolatore grande quanto una stanza[5]. La diffusione di sistemi operativi per sistemi mobili come iOS (Apple) e Android (Google), hanno portato ad un vasto mercato di applicazioni, comunemente abbreviate col termine App, di svariati tipi.

Le App possono essere giochi oppure di utilità (i.e. calcolatrice, spreadsheet, agenda, previsioni meteo etc.). Recentemente si stanno cominciando ad utilizzare come strumento di ricerca in quanto, attraverso le App, è possibile monitorare dei soggetti di interesse in modo molto efficiente, potendo così collezionare una quantità di dati che non ha precedenti nella storia dell'umanità (Consolvo et al., 2007). Il nostro è un periodo storico in cui non parliamo più di dati ma di Big Data, una mole di dati che ci consentirà di trovare delle relazioni tra diverse sorgenti di dati che abbiano un forte valore informativo di carattere scientifico (Mayer-Schönberger, & Cukier, 2013).

## 4.5 La ricerca

### 4.5.1 *Obiettivi*

Questo studio è volto alla misura della felicità, intesa come benessere soggettivo, in relazione ad aree rilevanti della vita di un individuo e ai suoi eventi giornalieri.

Scopi specifici del lavoro stati:

1) Definire le variabili relative alla felicità legata ai momenti e ai luoghi di vita in relazione alla letteratura di riferimento
2) Costruire una app per smartphone in grado di misurare le dimensioni individuate;

Sulla base dei risultati raggiunti, gli scopi futuri si focalizzeranno su:

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3 http://www.theguardian.com/technology/2014/jan/13/smartphone-explosion-2014-india-us-china-firefoxos-android

4 http://www.ilsole24ore.com/art/finanza-e-mercati/2014-01-28/un-miliardo-nuovi-smartphone-2013-+384percento-traguardo-storico-le-vendite-globali-samsung-ne-vende-piu-doppio-apple-072421.shtml?uuid=ABtXzis

5 http://bits.blogs.nytimes.com/2011/05/09/the-ipad-in-your-hand-as-fast-as-a-supercomputer-of-yore/?_php=true&_type=blogs&_r=0

3) Attivare la app ed analizzare i dati raccolti in relazione alla popolazione di lingua italiana e inglese.
4) Testare le validità psicometriche della app su un campione reperito sui social networks.
5) Verificare differenze di nella predilezione di specifiche dimensioni del benessere e della felicità

### 4.5.2 *Partecipanti*

Per la realizzazione della seconda fase di ricerca sarà selezionato un campione che sia il più rappresentativo possibile in termini di età, genere, provenienza geografica, tipo di lavoro, grado di istruzione, e situazione affettiva. Lo scopo è di rendere la HappApp disponibile all'uso a molteplici segmenti della popolazione, in modo tale da poter effettuare confronti tra le varie categorie ed ottenere dati più affidabili. Poiché lo strumento si presta ad un uso vasto e condiviso per facilità di esecuzione, contenuto ludico, accessibile ed appropriato ad un ampio pubblico, e basso livello di intrusività nella vita giornaliera dei rispondenti, l'obiettivo di renderlo disponibile al più alto numero di persone non dovrebbe incontrare eccessivi ostacoli.

### 4.5.3 *Realizzazione dello strumento*

La HappyApp costituisce una app finalizzata alla misurazione della felicità da sviluppare per i più diffusi sistemi operativi presenti sul mercato cominciando con Android e seguendo poi con iOS e Windows.
In particolare, l'obiettivo dello strumento mira a monitorare la felicità dei soggetti coinvolti nella ricerca attraverso uno strumento che consenta all'utente di creare un avatar emotivo al quale sarà possibile cambiare l'espressione del volto attraverso veloci interazioni tattili (Fig. 1, sinistra). Sarà possibile inoltre arricchire la descrizione emotiva con altre caratteristiche che possano permettere di ricostruire il contesto dell'emozione provata dall'utente. La ludicizzazione dello strumento offre la possibilità di rappresentare per l'utilizzatore un gioco che all'intrattenimento può aggiungere una

fase di restituzione nella quale il software indica all'utente cosa lo ha reso più felice e quando (Fig. 1, destra).

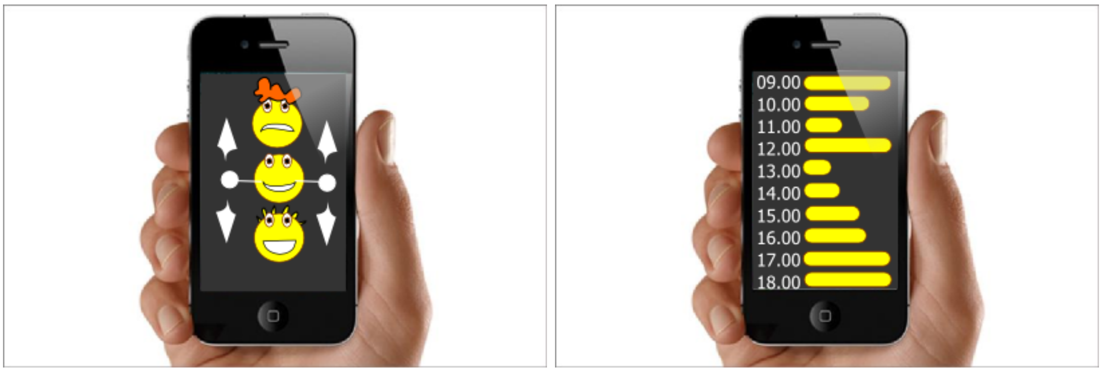


Fig. 1. Screenshot dimostrativi. Sinistra: Personalizzazione dell'avatar emotivo. Destra: feedback sull'andamento della felicità durante la giornata.

Rispetto ad altri software presenti sui vari App store, come per esempio Track your Happiness (www.trackyourhappiness.org), che si basano su una serie di domande notificate in maniera random durante il giorno che possono prendere diverso tempo e che comunque vengono avvertiti come un compito, l’approccio su cui la HappyApp si basa permette in maniera semplice e non invasiva (l'App è percepita come un gioco) di recuperare le informazioni sullo stato emotivo (insieme ad altre informazioni contestuali come per es. la geolocalizzazione) dell'utilizzatore sfruttando un processo di ludicizzazione capace di avere effetti sulla motivazione a partecipare del soggetto stesso (Werbach e Hunter, 2012).

Un vantaggio che questo tipo di tecnologia ludica ci offre rispetto ad altre metodologie riguarda la capacità di collezionare dati senza dovere avere una specifica finestra temporale di applicazione: costituedo un gioco, l’App potrà essere utilizzata sempre, non dando così la percezione all’utente di fare parte di un campione di studio.

### 4.5.4 *Caratterizzazione gestionale delle informazioni proposte dallo strumento*

Un obiettivo perseguito attraverso la prima e seconda presentazione del prototipo è stato raccogliere indicazioni e feedback in merito all’organizzazione della app al fine di rendere lo strumento di facile comprensione e utilizzo. In tal senso sono stati definiti quali contenuti esprimere graficamente, quali azioni richiedere all’utente, e quale gerarchizzazione delle informazioni da proporre nei diversi livelli di interazione con lo strumento.

### 4.5.5 *Caratterizzazione linguistica e back translation*

L'utilizzo della app è stato testato per verificare: 1) l'accessibilità e chiarezza del linguaggio utilizzato 2) la adeguatezza degli item in relazione alla tematica indagata 3) la equivalenza degli item della versione italiana con quelli della versione inglese

In tal senso è stata eseguita una procedura di back translation sia in relazione alla espressione linguistica , che fosse il più vicino possibile al linguaggio comune, sia in relazione a dimensioni di vita ed esperienze delle diverse realtà culturali e ambientali che dovevano trovare espressione nella app proposta.

### 4.5.6 *Aree/componenti del benessere e della felicità*

Al fine di creare una lista di aree/componenti della felicità e del benessere da inserire nella HappyApp, si è reso necessario prima analizzare la letteratura al riguardo e successivamente testare la stessa su di un campione di accademici e persone estranee all'ambio scientifico individuato. Come accennato in precedenza, la letteratura scientifica sul benessere e la felicità è estremamente ampia e variegata, e nel corso degli anni ha fornito sia molteplici definizioni di felicità e benessere, sia diversi costrutti per operazionalizzare talli concetti (vedi Diener, Oshi, & Lucas, 2012). Già agli inizi degli anni 80, Angus Campbell, nel suo volume "The Sense of Well-Being in America' analizzò 12 domini del benessere, tra cui: Matrimonio, Famiglia, Amicizia, Standard di vita, Lavoro, Vicinato, Città o paese di residenza, Nazione, Casa (intesa sia come luogo fisico, sia come luogo degli affetti), Educazione (inteso come rapporto con l'istituzione scolastica), Salute, e il Sé (inteso come grado di soddisfazione con la propria persona, espressione sia di pregi sia di difetti) (Campbell, 1981).

| Satisfaction with | Correlation coefficients* 1971 | 1978 |
|---|---|---|
| Self | | .55 |
| Standard of living | .45 | .48 |
| Family life | .50 | .45 |
| Marriage | .38 | .42 |
| Family income | | .40 |
| Friendships | .32 | .39 |
| Savings | .36 | .38 |
| Work | .36 | .37 |
| Housework | .34 | .33 |
| Life in the United States | .24 | .30 |
| Housing | .30 | .30 |
| Neighborhood | .23 | .29 |
| Health | .26 | .29 |
| Community | .28 | .29 |
| Amount of education | .28 | .26 |

*The entries in this table are product moment correlation coefficients between satisfaction with specific domains and satisfaction with life in general.

Domini del benessere e loro correlazione con la soddisfazione di vita. Fonte: Campbell, 1981, p. 241.

Per questo studio, un riferimento importante è stato il lavoro '*What makes us happy? A study on subjective representation of happiness components*' condotto da Galati, Sotgiu e Iovino (2006), attraverso il quale gli autori hanno redatto una lista di 20 dimensioni della felicità basata sulle risposte di 133 partecipanti alla richiesta di fornire le prime cinque componenti che, dal loro punto di vista, costituissero una vita felice.

A questa lista di dimensioni, si associa una serie di fondamentali studi, condotti da Ed Diener e colleghi, i quali hanno riportato i risultati di lavori decennali sui quei domini di vita maggiormente associati alla felicità degli individui. Tra questi, ricordiamo: Genere, Educazione, Religione, Matrimonio e vita di coppia, Lavoro, Situazione finanziaria, Salute fisica e mentale, Amicizia e relazioni sociali, (Diener, 2012; Diener & Ryan, 2009; Lyubomirsky, King, & Diener, 2005; Diener, Suh, Lucas, & Smith, 1999).

**Table 1. Frequency mean rank, and mean discrepancy score of the 20 happiness components**

| Happiness components | Frequency (%) | Mean rank | Mean discrepancy score |
|---|---|---|---|
| Health | 58.6 | 1.96 | 8.12 |
| Family | 58.6 | 2.78 | 7.48 |
| Money | 56.4 | 4.12 | 2.69 |
| Friendship | 42.9 | 4.42 | 7.86 |
| Love | 39.8 | 3.25 | 6.71 |
| Work | 39.8 | 4.21 | 4.00 |
| Success and self-actualization | 37.6 | 4.16 | 6.36 |
| Values | 30.1 | 4.70 | 6.94 |
| Pleasant events | 29.3 | 5.36 | 3.40 |
| Positive emotions | 25.6 | 3.94 | 6.21 |
| Good affective relationships | 21.8 | 4.90 | 7.50 |
| Serenity and well-being | 21.1 | 3.39 | 6.00 |
| Partner | 18.8 | 4.00 | 3.43 |
| Faith | 15.8 | 4.05 | 9.70 |
| Gender | 14.3 | 4.05 | 5.11 |
| Helping others | 12.8 | 5.29 | 8.33 |
| Absence of unpleasant events | 12.0 | 3.81 | 3.20 |
| Home | 12.0 | 6.31 | 6.71 |
| Hobbies | 6.0 | 5.50 | 7.40 |
| Culture and knowledge | 5.3 | 4.71 | 6.20 |

Fig. 2. Lista di componenti della felicità. Fonte: Galati, Sotgiu e Iovino, 2006, p. 66.

Un ulteriore contributo viene fornito dagli studi di Kahneman e colleghi (2004) i quali hanno costruito una lista di indicatori del benessere sulla base dei risultati ottenuti dell'applicazione del Day Reconstruction Method. Alcune di queste dimensioni, come Relazioni intime, Prendersi cura della casa e dei bambini, Pregare, meditare, Lavorare, (Fig. 3) si sono rivelate molto utili per la costruzione della lista di aree della felicità contenuta nella HappyApp.

**Mean affect rating**

| | Positive | Negative | Competent | Impatient | Tired | Mean hrs/day | %Resp. |
|---|---|---|---|---|---|---|---|
| **Activities** | | | | | | | |
| Intimate relations | 5.10 | 0.36 | 4.57 | 0.74 | 3.09 | 0.2 | 0.11 |
| Socializing | 4.59 | 0.57 | 4.32 | 1.20 | 2.33 | 2.3 | 0.65 |
| Relaxing | 4.42 | 0.51 | 4.05 | 0.84 | 3.44 | 2.2 | 0.77 |
| Pray/worship/meditate | 4.35 | 0.59 | 4.45 | 1.04 | 2.95 | 0.4 | 0.23 |
| Eating | 4.34 | 0.59 | 4.12 | 0.95 | 2.55 | 2.2 | 0.94 |
| Exercising | 4.31 | 0.50 | 4.26 | 1.58 | 2.42 | 0.2 | 0.16 |
| Watching TV | 4.19 | 0.58 | 3.95 | 1.02 | 3.54 | 2.2 | 0.75 |
| Shopping | 3.95 | 0.74 | 4.26 | 2.08 | 2.66 | 0.4 | 0.30 |
| Preparing food | 3.93 | 0.69 | 4.20 | 1.54 | 3.11 | 1.1 | 0.62 |
| On the phone | 3.92 | 0.85 | 4.35 | 1.92 | 2.92 | 2.5 | 0.61 |
| Care of my children | 3.86 | 0.91 | 4.19 | 1.95 | 3.56 | 1.1 | 0.36 |
| Computer/e-mail/Internet | 3.81 | 0.80 | 4.57 | 1.93 | 2.62 | 1.9 | 0.47 |
| Housework | 3.73 | 0.77 | 4.23 | 2.11 | 3.40 | 1.1 | 0.49 |
| Working | 3.62 | 0.97 | 4.45 | 2.70 | 2.42 | 6.9 | 1.00 |
| Commuting | 3.45 | 0.89 | 4.09 | 2.60 | 2.75 | 1.6 | 0.87 |
| **Interaction partners** | | | | | | | |
| Friends | 4.36 | 0.67 | 4.37 | 1.61 | 2.59 | 2.6 | 0.65 |
| Relatives | 4.17 | 0.80 | 4.17 | 1.70 | 3.06 | 1.0 | 0.38 |
| Spouse/SO | 4.11 | 0.79 | 4.10 | 1.53 | 3.46 | 2.7 | 0.62 |
| Children | 4.04 | 0.75 | 4.13 | 1.65 | 3.40 | 2.3 | 0.53 |
| Clients/customers | 3.79 | 0.95 | 4.65 | 2.59 | 2.33 | 4.5 | 0.74 |
| Co-workers | 3.76 | 0.92 | 4.43 | 2.44 | 2.35 | 5.7 | 0.93 |
| Boss | 3.52 | 1.09 | 4.48 | 2.82 | 2.44 | 2.4 | 0.52 |
| Alone | 3.41 | 0.69 | 3.76 | 1.73 | 3.12 | 3.4 | 0.90 |
| Duration-weighted mean | 3.89 | 0.84 | 4.31 | 2.09 | 2.90 | | |

Fig. 3 Lista di indicatori della felicità. Fonte: Kahneman, Krueger, Schkade, Schwarz, & Stone, 2004.

#### 4.5.6.1 *Procedura di validazione delle componenti della HappyApp*

Sulla base dei lavori appena citati, è stata creata una lista di aree della felicità, la cui versione finale consta di 19 dimensioni (Appendice A). Nella prima fase della costruzione, quest'ultima è stata inviata via email ad una serie di ricercatori, e ricercatrici esperti/e del tema trattato insieme ad un questionario (Appendice C) per valutare aspetti quali: chiarezza e comprensibilità dei contenuti, completezza degli indicatori e delle descrizioni e qualsiasi altro elemento suscettibile di essere migliorato. Questa procedura ha permesso di rivedere alcune delle aree, e le relative descrizioni, nonché di aggiungere altre dimensioni inizialmente non considerate.

In seguito, la lista è stata condivisa su di un gruppo online al quale sono stati invitati a partecipare persone estranee all'ambito accademico al fine di testarne l'impatto su di un pubblico più ampio di quello pertinente all'area scientifica.

Essendo la HappyApp uno strumento rivolto a 'persone comuni', questo passaggio è stato fondamentale per verificare la comprensibilità e l'accuratezza degli indicatori per il ‘pubblico’. Anche in questa fase, sono giunti preziosi suggerimenti per migliorare la resa dello strumento. In particolare, alcune descrizioni relative sia alle dimensioni sia agli indicatori della felicità sono state riformulate in un linguaggio più accessibile ai non esperti.

Sia la stesura degli indicatori, sia la verifica online è stata eseguita in due lingue simultaneamente, italiano e inglese, al fine di poter utilizzare la HappApp sia a livello nazionale che internazionale (Appendice A e B).

## 4.6 Criteri di scelta del metodo di indagine

Data la natura del campione così come gli obiettivi della ricerca, per questo studio si propone una combinazione del Day Reconstruction Method (Kahneman et al., 2004) con dell’Experience Sampling Method. Infatti, l’uso congiunto di entrambi gli strumenti mira a superare alcuni dei principali ostacoli posti dall’uso dell’Ecological Momentary Assessment come strumento di ricerca. Ad esempio, l’uso congiunto del Day Reconstruction Method e dell’Experience Sampling Method è stato sperimentato da Khan e colleghi (2007) in uno studio sulla comunicazione familiare. Nel combinare i due metodi di ricerca, gli autori, hanno utilizzato il signal-contingent sampling, concedendo ai partecipanti che non potevano rispondere quando il segnale casuale li invitava a compilare il questionario, di fornire una risposta il giorno successivo utilizzando il Day Reconstruction Method. Nel nostro caso, l’uso della HappyApp propone una ulteriore variante a tale approccio, la quale verrà meglio presentata nelle pagine successive, dove verranno analizzati i principali limiti di entrambi i metodi e le soluzioni più indicate per superarli. Per questo studio, verrà pertanto adoperato l’uso congiunto del Day Reconstruction Method (DRM) e l’Interval-contingent sampling (ICS) ad intervalli.

### 4.6.1 *Evitare di disturbare eccessivamente i partecipanti*

Uno dei principali problemi associati all’uso di ESM è il disturbo che il segnale (spesso sonoro, o in alcuni casi, fisico, come per esempio la vibrazione del dispositivo) causa nei partecipanti e di coloro che li circonda. Come Scollon, Kim-Prieto e Diener ci ricordano:

"*Immaginatevi come partecipanti alla ricerca… l'allarme disturba le vostre attività, conversazioni, lavoro, e non solo infastidisce voi direttamente, ma anche coloro che vi circondano, come può per esempio accadere stando in chiesa, a scuola, o a un meeting*" (p. 14).

Utilizzando l'Interval-contingent sampling (ICS) possiamo, assicurarci che il soggetto sia disturbato dalla compilazione del survey solo una volta al giorno, ad un orario che il egli/lei stesso/a può stabilire (possibilmente ad un'ora che coincida con la fine della giornata, poco prima di andare a letto) e modificare quest'ultimo in caso di variazioni durante il corso della settimana (nei week-end per esempio, quando, in genere, si sceglie di andare a dormire più tardi).

Tuttavia, l'Interval-contingent sampling (ICS) ad intervalli giornalieri richiederebbe comunque al soggetto di riportare semplicemente il suo stato alla fine della giornata; in tal caso non potremmo saper nulla di come si è svolta e come il soggetto valuta il resto della giornata. A tal proposito, l'uso del Day Reconstruction Method, può aiutarci a superare tale limite. Ciò che viene richiesto al soggetto, in altre parole, è di ricostruire la propria giornata riportando la soddisfazione esperita in vari ambiti della propria vita (es. lavoro, tempo libero, attività domestiche, tempo speso al volante, attività fisica etc.).

A differenza del Day Reconstruction Method classico, in questo caso, il soggetto non è costretto a rievocare gli eventi della giornata precedente, ma quelli della stessa appena conclusasi, evitando in tal modo di incorrere in specifici bias legati al richiamo degli eventi sotto esame. Questo tipo di approccio può anche essere definito come End-of-day subjective well-being (SWB) measurement (Stone and Mackie, 2009).

Questo metodo può contenere le stesse variabili che, in linea generale, i questionari self-report misurano in termine di 'soddisfazione globale di vita', con la differenza che, in questo caso, le domande riguardano come il soggetto si sente soddisfatto della propria giornata. Questo approccio tende a minimizzare i rischi legati ad un assessment cosi ampio come la valutazione della 'vita in generale' (come aveva sottolineato Martha Nussbaum) e focalizza invece su aspetti giornalieri più facilmente valutabili dal soggetto, poiché' più vicini (e dunque accessibili) alla sua esperienza quotidiana.

### 4.6.2 *Riduzione della Motivazione e della Collaborazione*

Come sopra accennato, sia ESM sia DRM richiedono sovente un costante grado di impegno e motivazione da parte dei partecipanti e tale sforzo può tradursi, soprattutto a lungo termine, in una grande quantità di missing data e drop-out. Al fine di mantenere alti i livelli di motivazione, Diener e colleghi suggeriscono di:

1. usare incentivi (di natura monetaria, ad esempio, come suggerito anche da Lynn (2001),
2. ridurre, quanto più possibile, sia il numero di segnalazioni per giorno, sia il numero di variabili da esaminare,
3. porre attenzione alla selezione del campione (in tal senso gli autori pongono una nota di cautela sul reclutamento di studenti universitari a fini di generalizzazione del campione).

Il primo punto, quello riguardante gli incentive mirati al mantenimento della motivazione, potrebbe essere eccessivamente dispendioso per un campione molto grande e per una valutazione di lunga durata. Come alternativa, l'aspetto ludico della HappyApp offrirebbe un incentivo importante in quanto l'uso della app implica un certo grado di divertimento nel costruire un avatar che può anche essere usato come icona social

In aggiunta, la HappyApp offrirà almeno altri due incentivi alla compilazione giornaliera: il primo consiste nel fornire un feedback giornaliero ogni qual volta i soggetti completano il questionario self-report, uno settimanale e, infine, un feedback mensile. In tal modo, potendo usufruire di informazioni riguardanti i propri livelli di felicità, i soggetti dovrebbero sentirsi maggiormente motivati a compilare il questionario ogni giorno.

Il secondo incentivo consiste in un premio da offrire a uno dei soggetti selezionato a caso tra quelli che abbiano compilato giornalmente ogni questionario per tutta la durata dello studio. Il premio (ancora da stabilire) costituirebbe un ulteriore incentivo a non abbandonare la ricerca e a compilare tutti i questionari.

Il secondo punto può essere superato, come sopra accennato, dall'uso congiunto dell'Interval-contingent sampling (ICS) con una singola segnalazione giornaliera e del

Day Reconstruction Method (DRM) con un limitato numero di variabili da esplorare in modo tale da non richiedere più di 1-2 minuti al soggetto per compilare il questionario.

Il terzo punto, riguardante la selezione del campione, sviluppando una app scaricabile da internet, ci si dovrà assicurare una discreta randomizzazione del campione, soprattutto al di fuori del contesto accademico universitario.

## 4.7 Criteri per l'Analisi dei Dati e risultati attesi

In genere, uno dei problemi posti dall'uso di ESM è rappresentato dal grande numero di data points. Diener e colleghi, suggeriscono, in tal senso di aggregare i dati creando una media settimanale. Tuttavia, l'Interval-contingent sampling (ICS) con un singolo segnale per giorno, risulta già, in un certo qual modo, un metodo di aggregazione dei dati, poiché' ai soggetti viene richiesto di riportare una stima di come essi hanno percepito vari aspetti della propria giornata. Il basso numero di variabili utilizzate concorre a ridurre la grandezza dei dati da analizzare. Tuttavia, per un periodo prolungato di tempo ciò potrebbe non bastare, e il suggerimento di Diener e colleghi di aggregare i dati potrebbe essere utile in tal caso.

L'uso di ESM richiede in genere un'analisi longitudinale dei dati. In tal caso sia la Multilevel Regression Analysis sia la Latent Growth Analysis possono essere impiegati a tal fine (Hox, 2010), in quanto entrambi convergono su simili risultati, nonostante certe peculiarità statistiche (es. una maggiore flessibilità' per il Latent Groth Analysis, con missing data ad esempio, e una maggiore precisione per il Multilevel Regression Analysis nel maneggiare un gran numero di hierarchical data) (Chou, Benterl, & Pentz, 1998) che verranno ulteriormente specificate nel corso dello studio.

### 4.7.1 *Valutazione della ricerca e risultati attesi*

Questo studio possiede il potenziale per aprire nuove aree di indagine nella ricerca della felicità e del benessere. L'utilizzo giornaliero della HappyApp, da parte dei partecipanti alla ricerca, potrà fornire migliori risposte a nuovi e vecchi interrogativi. Una delle aree di maggior interesse da indagare, risulta la variabile genere. La letteratura scientifica, in effetti, non sembra ancora aver raggiunto un accordo definitivo in merito al rapporto tra genere e soddisfazione di vita. Alcuni lavori, infatti, sembrano evidenziare che uno dei due generi sia più felice dell'altro (Inglehart, 2002), altri, invece non riportano alcuna differenza significativa tra come uomo e donna esperiscono il benessere e la felicità (Kahneman, & Krueger, 2006; Dierner et al., 1999).

Molti di questi studi, tuttavia, non hanno preso in considerazione variabili contestuali. Ad esempio, come Tesch-Römer, Motel-Klingebiel e Tomasik hanno dimostrato la relazione tra genere e soddisfazione di vita potrebbe essere meglio compresa in relazione alle ineguaglianze di genere, ovvero alla distribuzione iniqua di risorse ed opportunità per entrambi i sessi. Sulla stessa linea di ricerca, Della Giusta, Jewell e Kambhampati (2011) hanno evidenziato come l'accudimento dei figli e degli anziani incidano in maniera negativa maggiormente sulle donne che sugli uomini, ciò dovuto al fatto che sono queste ultime coloro ad essere spinte dalle pressioni sociali ad assumere incondizionatamente ruoli di cura.

Sempre in una prospettiva contestale, non esistono ancora numerosi studi al riguardo che abbiano indagato le dimensioni del benessere proprie a ciascun genere. Un'eccezione è rappresentata dal lavoro di Di Ceare e Amori (2006), le quali hanno analizzato differenze di genere nell'European Social Survey (ESS) 2002/2003, rivelando che la soddisfazione di vita delle donne è influenzata maggiormente da variabili quali religiosità, matrimonio, e interazioni sociali, mentre per gli uomini lo stato lavorativo sembra essere la variabile più significativa nel determinare una vita felice.

In altre parole, la ricerca scientifica non ha ancora dato risposta al quesito se gli uomini e le donne perseguano la felicità in maniera diversa e se, in particolare, prediligano certi ambiti della vita, piuttosto che altri. Sulla base della letteratura femminista, ed in particolare dell'etica della cura (Barnes & Brannelly, 2015; Held, 2006; Tronto, 1993; Noddings, 1984), potremmo aspettarci, per esempio, che le donne, rispetto agli uomini, perseguiscano la felicità attraverso domini di vita più orientati alla cura dei legami sociali, agli affetti, al rapporto con la natura, alla spiritualità e alla vita di comunità. Dal lato opposto, gli uomini potrebbero essere più inclini a scegliere domini di vita concernenti l'autorealizzazione, il successo personale e nella vita sociale, e l'impegno nel sociale e nella politica.

Un altro possibile risultato di questo studio potrebbe riguardare ciò che abbiamo definito, in via preliminare, 'effetto sabato del villaggio'. L'esperienza comune insegna che generalmente, nel corso della settimana, l'andamento di soddisfazione giornaliero segue una curva decrescente, che parte dal Lunedì per arrivare al Sabato. Il giorno successivo, la domenica (giorno festivo per molte persone) è marcato da sentimenti di noia, tristezza e stati di insoddisfazione e abbassamento di umore, dati dall'anticipazione che crea rispetto al rientro alla vita 'attiva' rappresentato dal Lunedì.

Questo tipo di esperienza, così spesso e largamente condivisa tra ampi segmenti della popolazione (non solo Italiana), non è ancora stata valutata con strumenti scientifici. Pertanto, questo studio, basandosi sulle fluttuazioni del benessere soggettivo lungo l'arco della settimana, potrebbe fornire una risposta confermando, o al contrario disconfermando l'effetto 'sabato del villaggio'. Inoltre, sempre in una prospettiva di genere, la HappyApp potrebbe meglio analizzare le differenza tra uomini e donne rispetto alle fluttuazioni del proprio benessere soggettivo lungo il continuum temporale.

## 4.8 Conclusioni

Poter costruire uno strumento facile e accessibile come HappyApp ha costituito una interessante opportunità per sviluppare, su di un'ampia popolazione ricerche longitudinali finalizzate a individuare le occasioni e gli elementi che concorrono alla costruzione del benessere. In tal senso, questo studio si propone di unire competenze sviluppate nell'ambito dell'applicazione di nuove tecnologie con quelle sviluppate nello studio della felicità da una prospettiva critica e di genere (Arcidiacono & Di Martino 2012, 2016; Arcidiacono 2013; Di martino 2013).

In particolare, questo studio, si propone di superare alcuni dei limiti degli strumenti fino ad oggi utilizzati per misurare il benessere, come i questionari self-report. L'obiettivo principale è quello di investigare tale costrutto in una prospettiva contestuale, che tenga conto dei diversi ambiti di vita importanti per la costruzione individuale della felicità. Inoltre, l'utilizzo di questo strumento potrà fornire una visione più accurata su come i due sessi perseguono una vita felice. In tal senso, la HappyApp potrebbe fornire risposte ad un dibattito non ancora risolto all'interno della letteratura scientifica.

Pertanto i risultati attesi possono aprire una nuova prospettiva nello studio della felicità contribuendo a definire variabili in gioco nei diversi contesti sociali e relazionali. La HappyApp costituisce, a tale riguardo, un tentativo per meglio comprendere come le persone vivono la propria vita e cosa le rende felici. Questo studio, pertanto, si propone di ampliare la nostra comprensione di tale fenomeno, e in tal modo, mettere in atto migliori strategie di intervento per la promozione e la salvaguardia del benessere individuale e sociale.

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## Appendice A: Lista delle Componenti/Aree per HappyApp in Italiano

| Lista di Componenti/Aree della felicità | Descrizione/Esempi |
|---|---|
| **Salute** | Condizione fisica e/o psicologica |
| **Famiglia** | Rapporto con familiari e/o parenti. Obblighi familiari, cura dei bambini e dei membri della famiglia che richiedono cure. |
| **Soldi** | Condizioni economiche (i.e. stipendio, affitto e bollette, debiti, mutuo) |
| **Amicizia e vita sociale** | Relazionarsi con amici e/o colleghi (non a lavoro). Organizzare e/o partecipare a eventi sociali e attività di gruppo. Chattare e interagire su social networks (Facebook, Twitter, Tinder, Meetup etc.) |
| **Lavoro** | Clima, ambiente, atmosfera lavorativa, compiti e responsabilità, obiettivi professionali e carriera lavorativa. |
| **Relazioni intime** | Intrattenere una relazione sentimentale con uno (o più) partner |
| **Sesso** | Avere rapporti sessuali e/o altre pratiche sessuali |
| **Spiritualità** | Avere credenze di natura spiritual e comportarsi in conformità ad esse (pregare, andare a messa, meditare, praticare il proprio culto) |
| **Cura degli altri** | Essere volto agli altri (fare volontariato, essere caritatevole e compassionevole, raccogliere fondi a scopo caritatevole, partecipare e/o organizzare eventi caritatevoli, offrire qualsiasi altra forma di aiuto e supporto per gli altri. |
| **Sport e Benessere** | Praticare e/o prendere parte a qualsiasi tipo di sport fisico e/o mentale. Andare in palestra, fare yoga, esercizio fisico, seguire una particolare tipologia di dieta e/o nutrizione. |
| **Hobby e Tempo libero** | Leggere, giocare, guardare la Tv, andare al cinema, andare in giro, viaggiare, bricolage. Prendere parte ad attività culturali e |

| | |
|---|---|
| | artistiche. |
| **Casa** | Attività domestiche (occuparsi delle faccende di casa, decorare, curare il giardino, fare la spesa) |
| **Valori e Principi** | Agire secondo principi che infondono significato alla vita e che sono in armonia con i propri convincimenti personali e la propria soddisfazione nel perseguire aspirazioni e obiettivi di vita. |
| **Animali** | Prendersi cura di animali domestici e non (pulirli, nutrirli, portare a spasso, allenarli) |
| **Educazione** | Frequentare scuola(e), college, università, training, tirocini e qualsiasi altra pratica e attività di formazione |
| **Impegno civile e politico** | Prendere parte ad attività civiche (movimenti sociali, gruppi di militanza, sindacati, partiti politici etc.) |
| **Vita di Comunità** | Prendere parte alla vita di comunità (partecipare a gruppi locali, club, rapporti con il vicinato, gruppo scolastico, parrocchia). |
| **Fascino e Look** | Prendersi cura del proprio look e aspetto fisico (vestiario, trucco, accessori, trattamenti estetici) |
| **Vita all'area aperta e Natura** | Organizzare e/o prendere parte ad attività all'area aperta (ricercare il contatto con la natura e paesaggi naturalistici). |

## Appendice B: Lista delle Componenti/Aree per HappyApp in Inglese

| List of Components/Areas of happiness | Description/Examples |
|---|---|
| **Health** | Physical and/or Psychological condition |
| **Family** | Relationships with family members and/or relatives (family duties, childcare, caring for parents or relatives etc.) |
| **Money** | Financial conditions (i.e. Income, rent & bills, loans. debts, mortgage) |
| **Friendship and Social Life** | Having a Relationship with Friend(s) and/or Colleagues after work, organizing / taking part in social events and group activities, chatting and interacting on social networks (Facebook, Twitter, Tinder, Meetup etc.) |
| **Work** | Work climate, environment, atmosphere, working tasks and responsibilities, professional goals, and career achievements |
| **Intimate Relationship** | Having a close and/or committed relationship with a Partner and/or Lover |
| **Sexual Life** | Engaging in sexual intercourses and/or other Sexual practices |
| **Spiritual Beliefs** | Holding spiritual believes and act in accordance to them. Pursuing related practices. (i.e. pray, services, meditation, worship) |
| **Care for other(s)** | To be dedicated to others, volunteering, being charitable, fundraising, taking part and/or organise charitable events, providing any other form of help |
| **Sport & Wellness** | Exercise and engagement in all forms of physical and /or mental sports. Going to the Gym, do yoga, physical exercise, special diet and/or nutrition |
| **Hobbies and Spare Time** | Read, playing games, watching Tv, go to the Cinema, Trips, Travelling, DIY (Do it yourself). Attending cultural or artistic events and activities. |

| | |
|---|---|
| **Home** | Household duties (Taking care of domestic chores, decorate the house, tend the garden, do food shopping) |
| **Values and Principles** | Acting in accordance with principles that give meaning to your life and are attuned with your personal achievements and the pursuit with life goals and aspirations |
| **Animals** | Taking care of animal(s) and/or pet(s) (grooming, exercising, training, feeding) |
| **Education** | Attending training, internship, school(s), college, university and whatever is related to this |
| **Civic and political engagement** | Being involved in civic activities (i.e. social movements (activist group(s), trade union, political party etc.) |
| **Community life** | Being involved in community- life (i.e. participate in local groups, club, neighbourhood, school board, parish) |
| **Beauty and Looks** | Taking care of your looks and physical appearance (i.e. clothes, make-up, accessories, beauty treatments etc.) |
| **Outdoor Life and Nature** | Planning and/or doing outdoor activities and seeking natural settings and landscapes. |

## Appendice C: Questionario per Lista Componenti della HappyApp

We are trying to build a list of the main components of a happy life. Please, take the time to answer the following questions in order for us to improve our list of indicators:

1- Do you think that the indicators above can all be significant in trying to determine the sate of someone's happiness?

Yes ☐ No ☐

Please explain your choice

2- Do you think the indicators and the descriptions are clear enough as well as easy to understand?

Yes ☐ No ☐

Please explain your choice

3- Is there any indicator/description you would like to add or remove?

4- Is there any further improvement you would like to suggest?

# Study 2:

## Section 1:

# Happiness as Fairness. A cross-national comparison between Social Justice and Life satisfaction in OECD Countries


## Abstract

Is happiness an internal state of mind? Is it an attitude to life that determines our way to interact with the world yet being unaffected by life circumstances? A portion of the scientific literature seems to believe that individuals are personally responsible for their own happiness, that the power of mind can overcome even the most dysfunctional circumstances, and that personal commitment is a key to achieving a good life. However, this perspective ignores that the environment can have a strong bearing on one's happiness. In particular, I argue in this study that conditions of social justice in a country can significantly affect the way people rate their life satisfaction. To this end, I utilized data provided by several world data banks in cross-national comparisons to shed more light on the relationship between social justice and happiness. Results from Simple and Hierarchical Multiple Regression Analysis reveal that Social Justice significantly predicts life satisfaction at the country level, even after controlling for national wealth, size of geographic area, size of the population, and political orientation of the government. Limitations of this research and future directions are also discussed. This study paves the way to further research, inviting more scholars to include the variable Social Justice in future studies investigating life satisfaction.



**Keywords**: happiness, well-being, social justice index,

## 5.1 Introduction

Over the last few decades an increasing number of disciplines have devoted their interest to the analysis of life satisfaction (see Johnston et al., 2012; Veenhoven, 1984, 2012; Thin 2012; Seligman, 2002, 2011; Bok 2010; Haybron, 2008; Layard, 2005; Diener, 2000; Sen, 1999). An analysis this extensive body of literature shows that at the national level, a consistent number of elements have been found to have an important bearing on people's quality of life such as social, economic, and cultural characteristics of the nations (Diener E., Diener M., & Diener C., 1995)[6]

Despite this interest on national determinants of life satisfaction, the scientific literature – particularly the psychological scholarship – has dedicated special attention on how enhancing individual internal resources and empowering character strengths. This approach to happiness, albeit widespread, quite extensively overlooks the effect of external life circumstances and the way these affect people's life. In particular, the presence of Social Justice has been surprisingly neglected (Arcidiacono & Di Martino, 2016; Prilleltensky, 2012; Di Martino, 2013). As Isaac Prilleltensky (2012) has pointed out:

"*researchers studying subjective well-being rarely if ever invoke justice in their explanations. In most cases, culture, age, marriage, social support, unemployment, and adaptation figure prominently on the list of well-being predictors; justice, however, does not*". (p. 3)

For a general definition of Social Justice we might use the quote from the introduction to Miller's seminal volume 'Principles of Social Justice' in which that authors states that social justice is "*how the good and bad things in life should be distributed among the members of human society*" (Miller, 1999, p. 1) One of the reasons accounting for the neglect of social justice in the scientific study of human flourishing is the tendency to consider happiness more as an internal state of mind or a personal matter, and as a consequence something that is affected more by the attitude people have towards life than the objective conditions of the outside world. There are, certainly, those who see happiness coming both from within and from without (Haidt,

[6] For a general review see also Diener, Oishi, & Lucas, 2012; Diener, Suh, Lucas, & Smith, 1999; Diener & Ryan, 2009.

2006). However, there also others who tend to attach an extremely low weight to external circumstances in determining life satisfaction (Lyubomirsky, Sheldon, & Schkade, 2005).

A prime example of this approach to happiness, is reported in the work by Sonka Lyubomirsky 'The How of Happiness' (2007), where the author argues:

*"...only about 10% of the variance in our happiness levels is explained by differences in life circumstances or situations – that is, whether we are rich or poor, healthy or unhealthy, beautiful or plain, married or divorced, etc*" (p. 21)

whereas 50% goes to a biological set point and 40% to intentional activities, which are the ones that purportedly account for authentic happiness. (Lyubomirsky, Dickerhoof, Boehm, & Sheldon 2011; Lyubomirsky, Sheldon, & Schkade 2005).

A similar line of argument, that is the human natural predisposition for adaptation, has also contributed to instil the idea that external circumstances have little or no bearing on people's pursuit of happiness or at least, they depend on the individual response (Lyubomirsky & Tucker, 1998). This case has been made, among others, by Nobel prize-awarded economist Amartya Sen, in particular to support his theory that rather than maximising happiness (Layard, 2005) freedom should be adopted as an indicator of the development of a country. In Sens' words:

"*... Our mental make-up and desires tend to adjust to circumstances, particularly to make life bearable in adverse situations... The hopelessly deprived people may lack the courage to desire any radical change and typically tend to adjust their desires and expectations to what little they see as feasible. They train themselves to take pleasure in small mercies.*" (Sen, 2009, p. 282-283)

With this statement, Sen seems to implicitly suggest that the presence of Social Justice would benefit more a person's objective well-being than his/her subjective contentment in life.

Those who are versed in the psychological literature of happiness studies might also recall at least two well-know theories of adaptation. Brickman and Campbell proposed the first one, namely the Hedonic Treadmill theory, in their work "*Hedonic Relativism and Planning the Good Society*" (1971). Subsequently, Brickman, Coates, & Janoff-

Bulman (1978), conducted a well-known study in support of their theory. The experimenters interviewed a sample of 29 between paraplegic and quadriplegic accident victims and 22 major lottery winners (between \$1 million and \$50,000) to rate how happy they were at their stage of their life. In both cases, respondents seemed to have adjusted so much to their condition that their level of life satisfaction scored very similar to the one they had one year before their life-changing event.

In the second case, Lykken and Tellegen (1996) rated 254 pairs of twins (79 monozygotic (MZ) and 48 dizygotic (DZ) twin pairs) on the Well-Being (WB) scale of the Multidimensional Personality Questionnaire (MPQ). Their work showed that a surprising high level of hereditability of nearly 80% was accounted for well-being to the point that they affirmed that "*trying to be happier is as futile as trying to be taller and therefore is counterproductive*" (Lykken & Tellegen, 1996, p. 189). This result led the authors to hypothesize a set point around which happiness might vary from time to time but, in the end, like a under the effect of a thermostat, it is bound to go back to its original state (Lykken, 1999; Lykken & Tellegen, 1996).

Despite the scientific literature has consistently reduced the prominence of our genetic make-up and capacity for adaptation in determining life satisfaction (see Bartels & Boomsma, 2009; Lucas, 2007; Headey, 2008; Fujita & Diener, 2005) as well as revalued the hedonic treadmill theory (Diener, Lucas, & Scollon, 2006) the idea that happiness is less affected by external life circumstances than internal predisposition to life has somehow survived until today (see Cummins, 2012; Kahneman & Krueger, 2006).

Contrary to the above arguments, in this study I will argue that Social Justice can have a direct as well as significant effect on how people enjoy their life. To this end, I conducted a quantitative a study, which shows the hidden link between a fair and equitable administration of a Country and the level of satisfaction with the life of its citizens.

As a note of caution, my argument will not completely undermine either Positive Psychology's theory of happiness as an internal attitude or Amartya Sen's capabilities approach to human development. In, fact we can all agree that the pursuit of happiness is related to personal freedom (Bavetta, Navarra, & Maimone, 2014; Inglehart, Peterson, & Welzel, 2008) and development of capabilities (Veenhoven, 2010). At the same time, we need more that people's life satisfaction to determine the development of a Country. My intent here is to demonstrate that both the arguments can be strengthened if we take into account the way social justice influences our capacity of experiencing a happy and fulfilling life.

## 5.2 The relationship between Social Justice and well-being

The failure to consider justice as an underlying principle of people's pursuit of happiness, has led many scholars, particularly psychologists, to frame life satisfaction as a matter of individual achievement. As a consequence, this vision has led to develop overly individual-cantered models (Seligman, 2002; 2011; Lyubomirsky 2007; Ryff & Singer, 2008), which rely too much on motivation, personal efforts, and achievements while ignoring other more external determinants – like the role of power and inequality (Nelson & Prilleltensky, 2010; Orford, 2008; Prilleltensky & Nelson, 2002) – as well as the real presence of resources and opportunities available to fulfil one's life.

Others, often economists, have instead drawn up a list of indicators (Stiglitz J. E., Sen A., Fitoussi J. P., 2012) that, although very useful, especially for informing governmental policies about the promotion of national happiness (Dolan & Metcalfe, 2012; Bok 2010; Diener & Seligman 2004; Diener 2000), run nonetheless the risk of appearing sometimes too abstract for those people living in particular contexts that, although not scoring highly in terms of general well-being indicators, may actually be quite close to their needs (Graham, 2009).

In the regard, Wilkinson and Pickett (2010) have recently shown that high levels of GDP do not always translate into increased quality of life. On the contrary, those countries that present a wider gap between the rich and the poor, even if apparently blessed by opulence, are also the ones more affected by social plights such as increased obesity rate, suicides, crimes, mental illness, and decreased life expectancy and social trust.

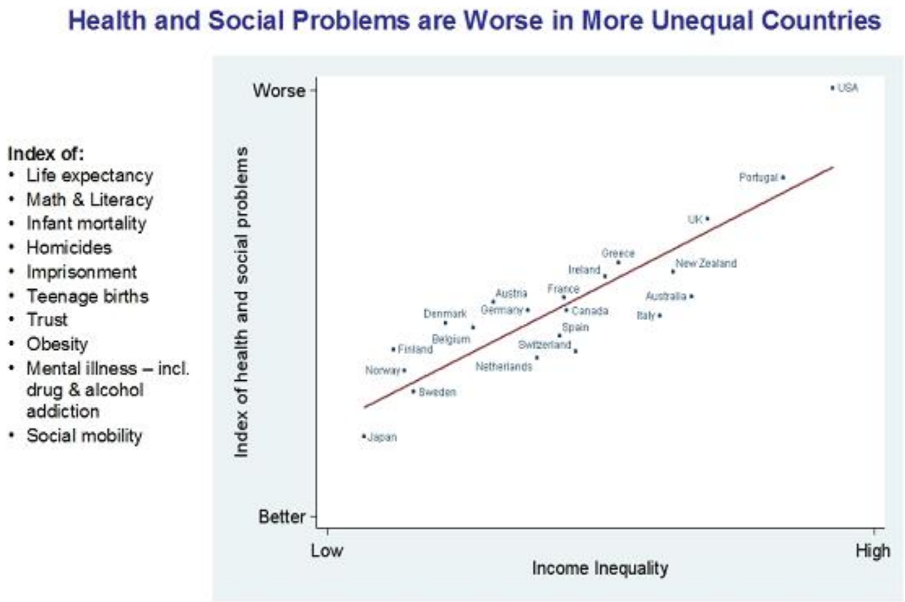


Fig. 5.1 Relationship between well-being determinants and income inequality. Source: Wilkinson & Pickett, 2009.

Adding a justice viewpoint to this evidence means ensuring that a) each person has access to the resources provided by social context with a fair and equitable allocation of burdens and privileges, rights and responsibilities, and pains and gains in society, in other words what it is known as distributive justice (Wilkinson & Pickett, 2010; Miller, 1999), and b) that everyone has the chance to register their opinion when it comes to decision-making processes, which is called procedural justice (Miller, 1999).

However, as I stated before, investigations on the nature of Social Justice and its relationship with Life Satisfaction are surprisingly missing from the scientific literature. This holds particularly true for macrojustice[7], where the lack of instruments for the measurement of national Social Justice is particularly evident. Some recent studies have attempted to shed more light on the relationship between freedom of choice, capabilities, and happiness (Bavetta, Navarra, & Maimone, 2014, Veenhoven, 2010). However freedom of choice covers only limited portions of what we consider social justice. This could be used as an explanation why the above authors have managed to

[7] The distinction between microjustice and macrojustice concerns primarily the level of analysis under exam Microjustice refers to the individual level, whereas Macrojustice is concerned with macro-level of society. (Brickman, Folger, Goode, & Schul, 1981).

find only significant correlations between reported indicators of happiness and the Human Development Index.

Conversely, a number of instruments have been developed to assess people's perception of microjustice. Examples in the literature are the Social Justice Scale (SJS) (Torres-Hardin, Siers, & Olson, 2012), the Procedural and Distributive Justice Beliefs for Self and Others (Lucas, Zhdanova, & Alexander, 2011) and the Bielf in a Just World Scale (Dalbert, 1999; Lipkus & Siegler, 1993; Rubin & Peplau, 1975).

## 5.3 Research questions

This study attempted to answer the following research questions:

1. Can Social Justice predict Life Satisfaction at the country level?
2. Are wealthier countries (i.e. high levels of Gross Domestic Product), abler to make their people happy?
3. Do smaller countries – both in terms of geography and size of the population – better contribute to their citizens' life satisfaction?
4. Does a particular political form of governmental political orientation produce more happiness than others?

The answer to the first question represents the main objective of this study. Due to the dearth of scientific investigation into the relationship between happiness and social justice at the macro-level, this is issue is of high topicality.

The second question is in line with a broad area of studies that have been investigated the relationship between national wealth and life satisfaction (for a review see Senik, 2014; Arthaud-day & Near, 2005). What I am particularly interested here is not so much to confirm or not the effect of GDP on life satisfaction, but to verify how this relationship is affected by the presence of a third variable, namely Social Justice.

Question 3 questions whether smaller countries, both in terms of geographic area and number of citizens in a given country, could more easily attend to people's needs and hence provide social justice.

With regard to question 4, I follow the results of previous research, which have outlined the relationship between good governance and happiness regardless of its political orientation (Ott, 2010; Helliwell & Huang, 2008). In this study, I will attempt to replicate this findings to verify whether a particular kind of government (i.e. right-wing or left-wing) is more capable of increasing national life satisfaction.

## 5.4 Data and Procedures

5.4.1 *Data collection and Measures.* Data for this study came from different sources. The social justice variable was collected from The Bertelsmann Stiftung Institute. This has in fact recently developed the Social Justice Index (SJI) (Schraad-Tischler, 2011), which is based on the theoretical work of Merkel Wolgang (2001, 2007) and taps into six domains: Poverty prevention, Access to education, Labour market inclusion, Social cohesion and non-discrimination, Health, and Intergenerational justice.

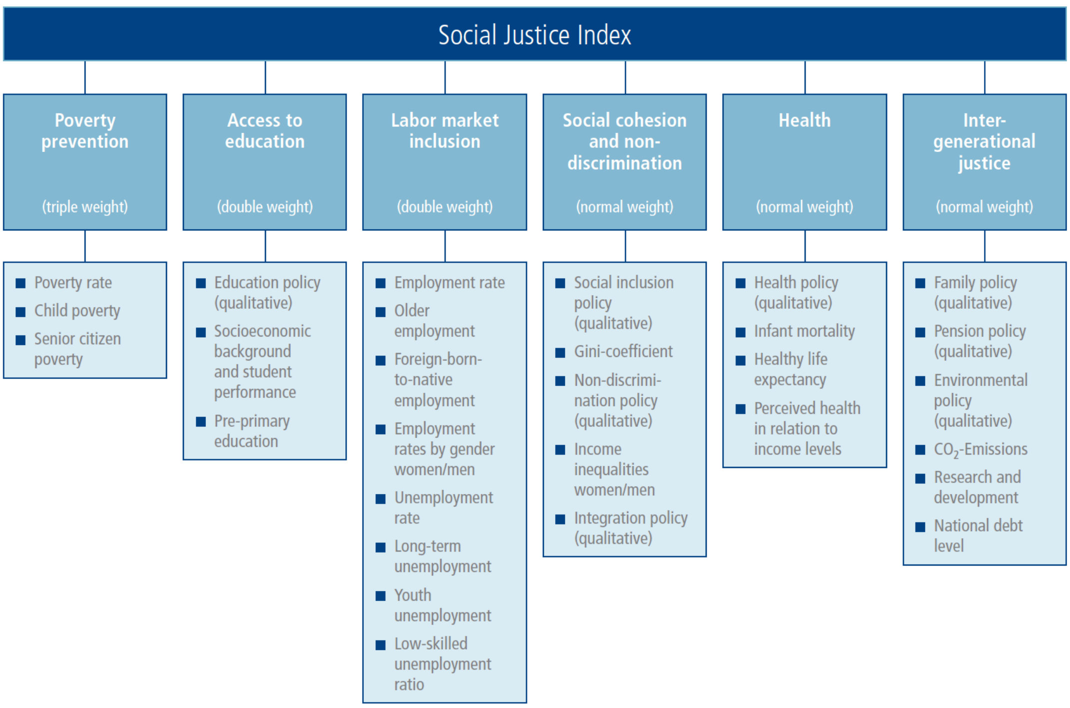


Fig. 5.2 Social Justice Index 6 dimensions and 29 indicators. Source: Schraad-Tischler, 2011.

The index is comprised of 21 quantitative and eight qualitative indicators, each accounting for with one of the six dimensions of social justice (Schraad-Tischler, 2011). Data on ‘GDP per capita’ were collected from the World Data Bank (http://data.worldbank.org/indicator/NY.GDP.PCAP.CD) and likewise for the variable ‘Size of the population’ (http://data.worldbank.org/indicator/SP.POP.TOTL). The variable Life Satisfaction was acquired from the ‘Human Development Index 2011’ indicator ‘Overall Life Satisfaction Index (2007-2012)’, which is in turn taken from the Gallup World Poll[8]. Lastly, the variable ‘Leading Political Party Orientation’ was created ad-hoc by assessing each country individually based on whether the party ruling the Country in 2011 fell more on the left or right side of the political spectrum (see Appendix A).

5.4.2 *Sample.* The sample consists on 30 Countries all belonging to the ‘Organization for Economic Cooperation and Development’ (OECD). These were rated on their level of *Social Justice*, which ranges from a minimum of 4.19 for Turkey to a maximum of 8.73 for Sweden (see Appendix B) with a mean vale of 6.67 (*SD* = 1.101). The only independent variable accounted in this study is Life Satisfaction (*Mean* = .87, *SD* = 0.050). Controlling variables are as follows: GDP per capita (*Mean* = 44508.4, *SD* = 24814.1), Area in $Km^2$ (*Mean* = 1201538.0, *SD* = 2752254.6) and Size of the population (*Mean* = 40937709.1, *SD* = 61804356.2). With regard to ‘Leading Party Political Orientation’ a frequency analysis was conducted. This showed that 11 countries (36.7% of the sample) in 2011 were led by a left-wing Government and 19 countries (63.3% of the sample) were led by a right-wing Government (see Table 1). All the variables employed in this study present no missing value.

5.4.3 *Software*. For this study two statistical software were employed, namely IBM Spss Statistics 20 for descriptive and inferential statistics, and G*Power 3.1.9.2 for power analysis. Datagraph 3.2 was used to draw all the scatterplot graphs.

[8] Respondents are asked to rate their life on a Cantril scale from 0 (least satisfied) to 10 (most satisfied)

## 5.5 Preliminary Analyses

5.5.1 *Normality*. Given the small sample size, all the variables included in this study were tested for distribution to normality. The histograms and normal Q-Q plots (Appendix C) show quite clear deviations from normality for all variables except Social Justice. This is also confirmed by table 2, which reports the results of the Kolmogorov-Smirnov and Shapiro-Wilk tests. As we can see, only Social Justice appears to be normally distributed, with a high non-significant *P* value for both tests. More specifically, Table 1 shows the possible presence of Skewness and Kurtosis for all variables except Social Justice. The presence of non-normally distributed variables calls for robust statistical analyses. With regard to, in this study all the analyses were performed with the Bootstrap technique, which has proved effective against non normality as well as other statistical biases such as the presence of outliers and heterogeneity of variance[9] (Efron & Tibshirani, 1993; Boos & Brownie, 1989) even with relatively small samples (Westfall & Young, 1993).

5.5.2 *Validity*. The Social Justice Index was checked for convergent validity by correlating the SJI 2011 with the Human Development Index (HDI) 2011. The HDI is a measure of country development based on three main dimensions, that is: Health, Education, and Living Standards. The HDI has been already employed in previous research on the relationship between freedom of choice, capabilities, and life satisfaction (Bavetta, Navarra, Maimone, 2014). Correlation between SJI and HDI was fairly high and significant ($r$ = .678, 95% BCa CI [.354, .843], $p < 0.001$) confirming that SJI and HID are actually related measures.

SJI has also been compared to the Fragile State Index 2011 (FSI) (Fund for Peace, 2011), which is a tool for the assessment of social, economic, and vulnerability worldwide. In this case too, the Pearson correlation coefficient resulted high and extremely significant ($r$ = -.787[10], 95% BCa CI [-.894, -.615], $p < 0.001$). This result confirms once more the convergent validity for SJI.

[9] At least two variables in this model, namely GDP per capita and Area in $km^2$, seem to indicate a violation of the assumption of homoscedasticity (see Appendix D and Appendix E).

[10] Each indicator of FSI scores from 0 to 10, with 0 being the most stable condition and 10 the most unstable. This explains the apparently contradictory negative correlation between SJI and FSI.

**Table 5.1. Descriptive Statistics for Dependent and Predictor Variables, *N*(30)*.**

| Variable | *Mean* | *Std. Deviation* | *Skewness* | | *Kurtosis* | |
|---|---|---|---|---|---|---|
| | | | *Statistic* | *Std. Error* | *Statistic* | *Std. Error* |
| Life Satisfaction | .87 | 0.050 | -1.766 | .427 | 3.767 | .833 |
| Social Justice | 6.67 | 1.101 | -.171 | .427 | -.356 | .833 |
| GDP per capita in $ | 44508.4 | 24814.1 | .996 | .427 | 1.410 | .833 |
| Area in $Km^2$ | 1201538.0 | 2752254.6 | 2.789 | .427 | 6.526 | .833 |
| Size of population | 40937709.1 | 61804356.2 | 3.207 | .427 | 12.654 | .833 |

| Variable | *Frequency* | *Percent* |
|---|---|---|
| Left-wing | 11 | 36.7 |
| Right-wing | 19 | 63.3 |

* Mean and Standard Deviation computed for Life Satisfaction, Social Justice, GDP, Area in Km2, and Size of population. Frequency analysis computed for Leading Party Political Orientation on 2 levels (i.e. Left-wing and Right-wing).

**Table 5.2. Tests of Normality**

| | *Kolmogorov-Smirnov* | | | *Shapiro-Wilk* | | |
|---|---|---|---|---|---|---|
| **Variable** | **Statistic** | **df** | **Sig.** | **Statistic** | **df** | **Sig.** |
| Life Satisfaction | .206 | 30 | 0.02 | .833 | 30 | .000 |
| Social Justice | .093 | 30 | .200 | .981 | 30 | .848 |
| GDP per capita in $ | .158 | 30 | .054 | .912 | 30 | .017 |
| Area in $Km^2$ | .427 | 30 | .000 | .450 | 30 | .000 |
| Size of population | .256 | 30 | .000 | .625 | 30 | 0.000 |

## 5.6 Data Analyses and results

### 5.6.1 *Social Justice and Life Satisfaction. Simple Regression Analysis*

This paragraph shows the results of the robust regression analyses for Life Satisfaction on the variables outlined above. As we can see from Table 3, first a simple regression analysis with Life Satisfaction as DV and Social Justice as IV was conducted. The result of the ANOVA shows that this model is better at predicting Life Satisfaction than its baseline model ($F = 5.803$; $df = 4$; $P < 0.01$) with a large effect size, $d = 0.926$.
The results show that Social Justice significantly predicts Life Satisfaction (β = .667, p < 0.001, BCa 95% CI [.259, .651], $p < .001$) and its effect follows a straight line[11].
.

**Table 5.3. Linear Simple Regression Analysis of Life Satisfaction on Social Justice, with 95% bias corrected and accelerated confidence intervals (10000 bootstrap samples), *N*(30)*.**

* *Model parameters:* $R^2 = .445$, $\Delta R^2 = .425$; $F = 22.441$; $df = 1$; $P < 0.001$

| | | | Bootstrap Coefficients | | | |
|---|---|---|---|---|---|---|
| **Predictor** | **Unstand. β** | **Stand. β** | **Std. Error** | **Sig. (2-tailed)** | **BCa 95% CI** | |
| | | | | | **Lower** | **Upper** |
| Constant | 3.803 | | .712 | .000 | 2.337 | 5.120 |
| Social Justice | .445 | .667 | .100 | .000 | .259 | .651 |

[11] Comparisons with curvilinear regression analyses, namely Logarithmic, Inverse, Quadratic, Cubic, Compound, Power, S, Growth, Exponential, Logistic, show Linear Regression to be the model explaining both the highest $R^2$ and $F$-ratio values.

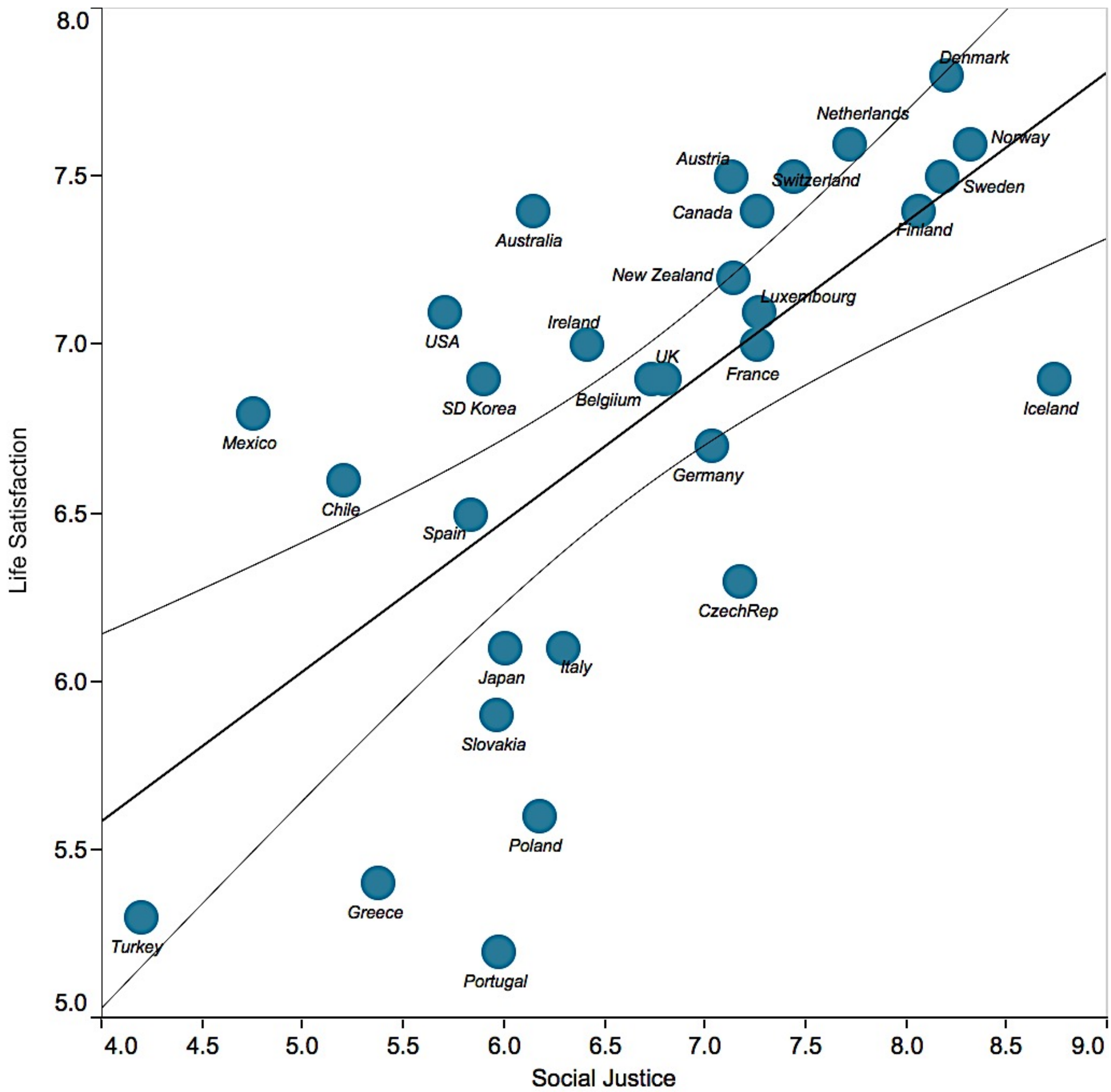


Fig. 5.3. Scatterplot for Social Justice and Life Satisfaction

#### 5.6.1.1 *Power Analysis with 1 predictor*

To test if the sample size was adequate for 1 predictor, namely Social Justice, a post-hoc Power Analysis with $R^2$ deviation from zero was performed. The effect size – which was computed from an $R^2$ of .445 – accounted for 0.801, a large effect size according to Cohen (1998). Based on this value, with a sample size of 30, the power of this test, that is the probability of rejecting a false $H_0$ (1-β prob err), was about .992. Considering that a cut-off point for power analysis is generally understood as a value equal of higher than .80 (Cohen, 1992) this test showed a 99% probability of not incurring in a Type II error. Transferring the value of the effect size (0.801) to an a-priori Power Analysis with 1 predictor revealed that a total sample size of minimum 26 cases was needed. Considering that our sample size accounts to 30 cases we can be confident of the power of the analysis.

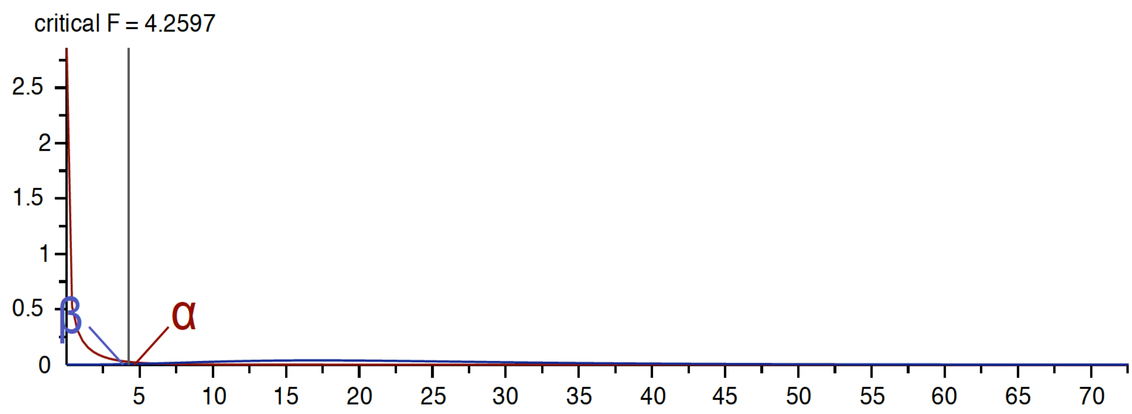


Fig. 5.4 Power Analysis Distribution Plot for Model with 1 predictor (i.e. Social Justice)

### *5.6.2 Social Justice, Life Satisfaction, and controlling variables. Hierarchical Multiple Regression Analysis*

To tests the hypothesis that Social Justice can still predict Life Satisfaction in the presence of the above-mentioned covariates, a Hierarchical Multiple Regression Analysis with simultaneous predictor entry was carried out. In order to include the variable ‘Leading Political Party Orientation’ into the analysis, the latter was recoded in a dummy variable where the level ‘left-wing’ was assigned a value of 0 and the level ‘right-wing’ a value of 1.

Being Life Satisfaction always the dependent variable, GDP, Area in Km2, Size of population, and Government Leading Party Political were entered first (Model 1). In the next step (Model 2), Social Justice was entered to determine how much unique variance this additional variable was able to explain after partialing out the effect of GDP and all the other control variables.

As we can see from Table 4., in model 1 the presence of the variables GDP, Area in $Km^2$, Size of population, and Government Leading Party Political Orientation explained about 48.1% of the variation in Life Satisfaction ($R^2$ = .481). The assessing of the goodness of fit of the model through ANOVA confirmed that the model was able to predict Life Satisfaction better than the baseline model ($F$ = 5.803; $df$ = 4; $P$ < 0.01) with a large effect size, $d$ = 0.926. Turning to the contribution of each variable, we notice that GDP per capita was the only one to be significantly able to predict Life Satisfaction (β = .629, p < .01, BCa 95% CI [0.000009, 0.000036]).

However, the figure became more complex when Social Justice was added. In fact, the inclusion of this new variable highly increased the $R^2$ (.625), meaning that that the model accounted for 62.5% of the variation in Life Satisfaction. The result of the ANOVA – and in particular the value of the $F$-ratio – also confirmed that this model fitted better than the previous one ($F$ = 8.015; $df$ = 5; $P$ < .001), with a large effect size, $d$ = .384. Turning to the contribution of each variable, we notice that, after the effect of Area in $Km^2$, Size of population, and Government Leading Party Political Orientation, was controlled, Social Justice still significantly contributed to Life Satisfaction (β = .545, p < 0.01, BCa 95% CI [.122, .604]). A further elements worth noticing in this model, is that the addition of Social Justice made the effect of GDP on Life Satisfaction non significant (β = .308, $p$ = .082, BCa 95% CI [0.000001, 0.000025].

**Table 5.4. Hierarchical Multiple Regression Analysis of Life Satisfaction on Social Justice (controlling for GDP, Area in Km2, Size of population, and Government Leading Party Political Orientation), with 95% bias corrected and accelerated confidence intervals (10000 bootstrap samples) *N*(30).***

| | | | | Bootstrap Coefficients | | | |
|---|---|---|---|---|---|---|---|
| | **Predictor Variable** | **Unstand. β** | **Stand. β** | **Std. Error** | **Sig. (2-tailed)** | **BCa 95% CI** | |
| | | | | | | **Lower** | **Upper** |
| Model 1 | Constant | 5.969 | | .330 | .000 | 5.292 | 6.562 |
| | GDP per capita in $ | .000 | .629 | .000 | .008 | 0.000009 | 0.000036 |
| | Area in $Km^2$ | .000 | .246 | .000 | .062 | -.000 | .000 |
| | Size of population | .000 | -.103 | .000 | .449 | -.000 | .000 |
| | Party Pol. Orient. | -.149 | -.099 | .213 | .487 | -.510 | .183 |
| Model 2 | Constant | 3.900 | | .770 | .000 | 2.425 | 5.254 |
| | GDP per capita in $ | .000 | .308 | .000 | .082 | 0.000001 | 0.000025 |
| | Area in $Km^2$ | .000 | .273 | .000 | .084 | -.000 | .000 |
| | Size of population | .000 | .059 | .000 | .690 | -.000 | .000 |
| | Party Pol. Orient. | -.210 | -.140 | .188 | .269 | -.530 | .096 |
| | Social Justice | .364 | .545 | .118 | .007 | .122 | .604 |

* *Model Parameters: Model 1:* $R^2$ = .481, $\Delta R^2$ = .399; $F$ = 5.803; $df$ = 4; $P$ = 0.002

*Model 2*: $R^2$ = .625, $\Delta R^2$ = .547; $F$ = 8.015; $df$ = 5; $P$ = 0.000

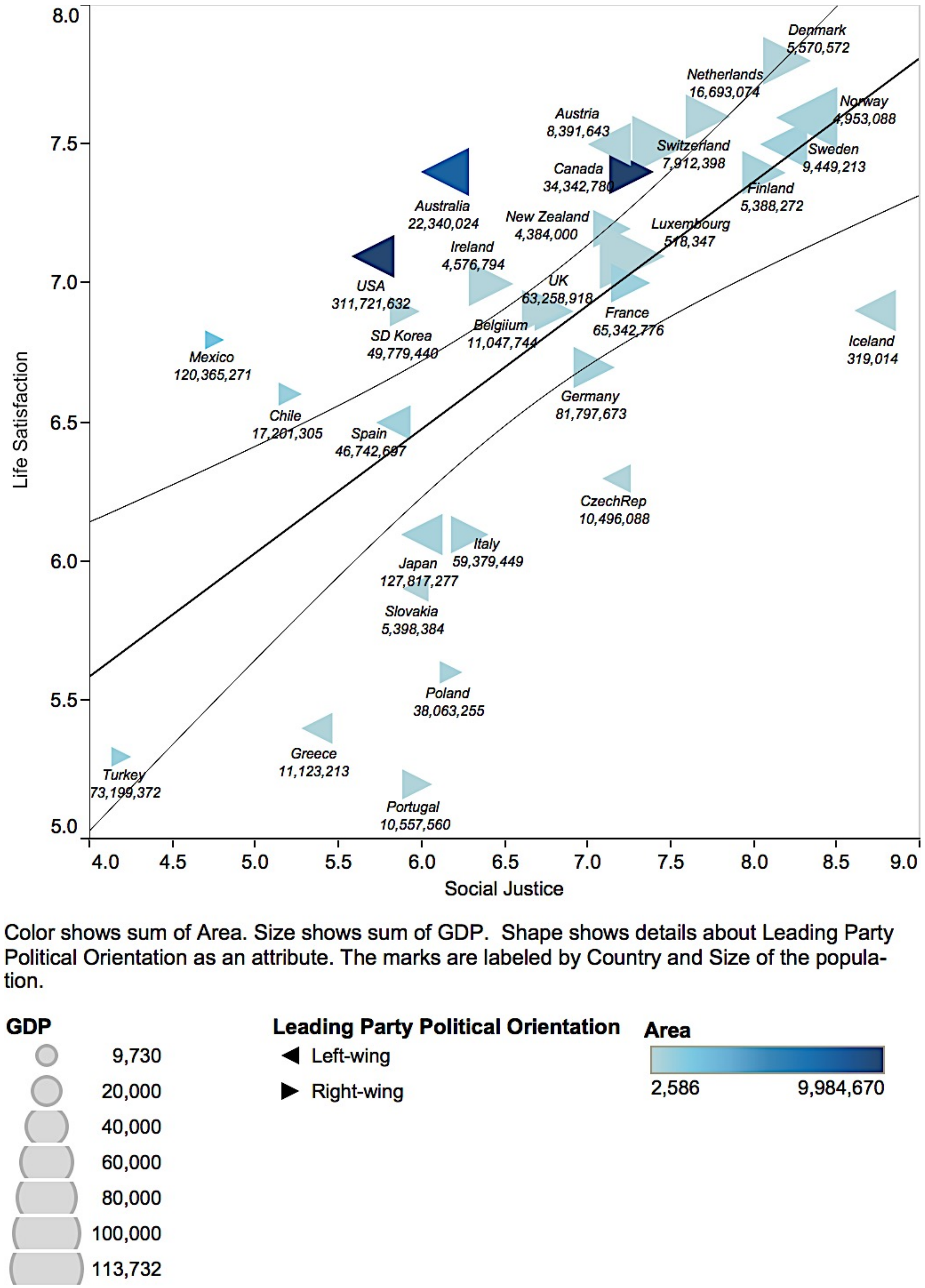


Fig. 5.5 Scatter Plot for Social Justice and Life Satisfaction controlling for GDP, Area in Km2, Size of population, and Government Leading Party Political Orientation

*5.6.2.1 Power Analysis with 5 predictors*

To test if the statistical analysis in Model 2 had enough power to retain 5 predictors, a post-hoc Power Analysis with $R^2$ increase was performed. Given the effect size –which was obtained by dividing the $R^2$ change (.144) by its residual variance (1 - .144 = .375) – the power of this test, that is the probability of rejecting a false $H_0$ (1-β prob err) was about .902. Considering the above-mentioned cut-off point of .80 (Cohen, 1992) this test showed about 90% probability of not incurring in a Type II error. Transferring the values of the effect size (.384) and the actual power (.902) to an a-priori Power Analysis with a total number of 5 predictors revealed that a minimum sample size of 24 cases was needed. Considering that our sample size accounted to 30 cases we can be confident of the power of the analysis.

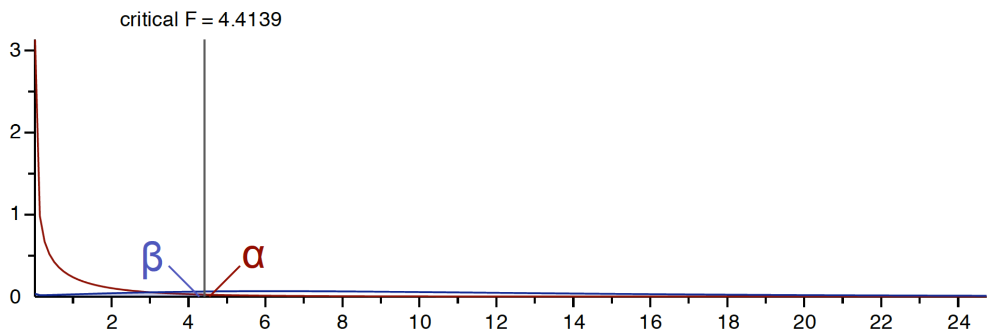


Fig. 5.6. Power Analysis Distribution Plot for Model with 5 predictors (i.e. Social Justice, GDP, Area in Km2, Size of population, and Government Leading Party Political Orientation).

*5.6.2.2 Outliers and influential cases*

The results of the Mahalanobis Distance indicated case 30 (Country = USA, *MD* = 21.362) and case 4 (Country = Canada, *MD* = 16.891) as the only two possible multivariate outliers in this analysis. In fact, after plotting them against the critical values suggested by Barnett and Lewis (1978), with a sample size of 30 and 5 predictors, at a an alpha level of 5% ($p$ = .05) they both exceed the critical value of 14.95.

The presence of these two multivariate outliers could be explained by their high value for the variable 'Area in km$^2$' which is quite far from the centroid of all other cases for the predictor variables. Nonetheless, the Cook's distance in both variables (*CD* = .027

for USA and *CD* = .383 for Canada), was well below the critical value of 1 suggested by Stevens (2009). This indicates that, although these two cases might have indeed been both outliers, they did not exert a large influence on the regression coefficients. In addition to this, no DfBetas exceeded the value of 2 suggested by Stevens (2009). This entails that the deletion of these two variables would not make a sizable change in the parameters of the regression model. Based on these results, case 30 and case 40 were not be excluded from this regression analysis.

## 5.7 Discussion

This study investigated whether there is a significant relationship between Social Justice and Life Satisfaction at the macro-level. The overall findings support the view that Social Justice has a role in determining people's life satisfaction. With regard to that, there are at least two points that this study highlights. First, Social Justice significantly predicts life satisfaction and this relationship follows a straights line. Second, Social Justice continue predicting Life Satisfaction even after controlling for Gross Domestic Product, the size of the country geography and population, as well as the form of government that ruled that country when the data were collected. With regard to the latter case, a striking result of this study is that when we include the presence of Social Justice, the relationship between GDP per capita and Life Satisfaction disappears. Previous studies have largely investigated the effect of national wealth on happiness (for a review see Easterlin, 2005, 1995; Veenhoven & Vergunst, 2014; Hagerty & Veenhoven, 2003). However, they had never taken the presence of social justice at the country level as possible causation of life satisfaction. This result shows that more investigations of how social justice determines people's life are needed.

A further interesting outcome of this study is the relationship of Social Justice and Life Satisfaction in the presence of 'Political Party Orientation'. The absence of significance for this variable demonstrates that good Governments, no matter on which side of the political spectrum lie, can provide thriving conditions for their citizens and hence increase their satisfaction with life.

## 5.8 Limitations and Future Perspectives

The results provided by this study should be considered in the context of some limitations. In particular, the Social Justice Index presents some shortcomings in terms of limited number of countries covered ($N = 30$) and time span (2011 is the only year covered). In fact, these two limitations impede to use the Social Justice Index in longitudinal analyses.

In addition to these, another limitation concern the methodology with which the Social Justice Index has been built. The six dimensions of Social Justice included in the Social Justice Index have been built through a normative/theoretical approach, rather than statistical analyses aimed at finding underlying dimensions such as Factor Analysis (Gorsuch, 2015; Basilevsky, 1994; McDonald, 1985), Multidimensional scaling (Borg, Groenen, & Mair, 2013; Kruskal, & Wish, 1978) and other related methods.

However, this shortcoming is slightly attenuated by the significant convergent validity between the SJI 2011 and the HDI 2011 as well as with the Fragile States Index 2011.

As one last note of caution, we should be mindful of the fact that the SJI does not take into account some of the important domains that are described by scientific literature on Social Justice (see Tyler, Boeackmann, Smith, & Huo, 1997), including Procedural, Retributive, Informational, Intrapersonal, Developmental, Cultural Justice, and some others that have been recently advocated, namely, Environmental Justice (Schlosberg, 2007) and Gender Justice (Berik, van der Meulen Rodgers, & Zammit, 2009).

In conclusion, these preliminary invite the scientific community to advance the exploration of the relationship between social justice, life satisfaction, and other determinants of well-being. There are, indeed, a number of questions still unanswered. Among these:

1. Whether it would be possible to use the SJI to account for the casual effect of social justice on a number of determinants of well-being such as life expectancy, mental health, social mobility, infant mortality, social trust etc., which in the past have been explained through a questionable correlation with economic inequality (see Wilkinson & Pickett, 2010; Snowdon, 2010).

2. To include more possible causations of happiness and well-being in a broader picture through Path Analysis, in order to determine how these interact and are affected by the presence of Social Justice.

# Section 2:

## Development and application of the Global Index of Social Justice

### Abstract

This study supports the thesis that conditions of Social Justice constitute the bedrock of people's pursuit of happiness as well as their maintenance of a satisfactory state of well-being. Based on this premises, I propose to develop a comprehensive tool able to assess the level of Social Justice around the world. My project intends to build this instrument by gathering data from a number of international databanks, polls, and other data sources. The data so collected will be conflated in the 'Global Index of Social Justice' (GISJ). Subsequently, this instrument will be used to compare the level of life satisfaction and well-being of different countries across the world with their level of social justice. The data analysis will be performed through cutting-edge statistical quantitative techniques (i.e. Structural Equation Modeling). The ultimate goal of this study is to submit a project proposal to the European Research Council Starting Grants scheme.

**Keywords**: Global Index of Social Justice, Capabilities, Structural Equation Modeling, Happiness, Well-being

## 5.9 Introduction

My project aims to overcome the limitations of the Social Justice Index (SJI) described above by developing a new Global index of Social Justice (GISJ). Subsequently this novel instrument will be used to confirm the linkage between Social Justice and life satisfaction. I intend to accomplish this task by adopting a theoretical approach based on an inter-disciplinary, critical, and ecological perspective (see Prilleltensky's ecological model in Prilleltensky (2012). This constitutes the theoretical ground upon which I will build a dynamic tool for the assessment of conditions of Social Justice around the world. The construction of the index will make use of statistical quantitative analysis in cross-national comparisons.
Following Nobel prize Amartya Sens's and Martha Nussbaum's capabilities approach (1993), which assumes social justice as a fundamental principle for benchmarking the freedom and development of a Country, this instrument will serve as a gauge for national governments to improve social policies and the welfare system. Moreover, the Global Index of Social Justice I intend to develop will also serve as a proxy for the same Governments to enhancing the level of life satisfaction and well-being of their citizens, with a consequent saving in terms of national health expenditure. One last advantage of this instrument lies in its capacity to monitor changes in social justice through time whereby assessing the effect that this has on the welfare of citizens along the temporal continuum.

- Criteria for a new Index of Social Justice:
- Embedded in theory
- Methodologically Sound
- High coverage in terms of a) Number of Countries b) time span

## 5.10 Data, Instrument, and Methodology

The first phase of this project consists in gathering secondary data from a number of databanks and other international data sources. The following is a non-comprehensive list of international datasets, which I will draw data from in order to develop the Global Index of Social Justice:

- Human Development Index (HDI)
- Gallup World Poll
- European Quality of Life Survey
- OECD dataset
- Legatum Prosperity Index
- World data bank
- Corruption Perception Index
- Freedom House Dataset
- United States Census Bureau
- Transformation Index BTI
- Global Health Observatory Data Repository
- World Values Survey
- Healthways Gallup Global Well-Being
- European Social Survey
- Happy Life Index
- Social Progress Index
- Unesco Institute for Statistics
- World Resource Institute
- World Health Organization
- Institute for Economics and Peace
- Institute for Global Health Metric and Evaluation

5.10.1 *Exploratory Structural Equation Modelling*. The analysis of the data will be performed within the framework of Structural Equation Modeling (Kline, 2010). The first phase will aim to build the GISJ through Exploratory Structural Equation Modeling (ESEM), which is a statistical technique that combines the advantages of both EFA and CFA (Asparouhov & Muthén, 2009). The primary task in this model-testing procedure is to determine the goodness-of-fit between the hypothesized model and the sample data. One of the key issues is to avoid underfactoring, more than overfactoring. Overfactoring, in fact, is likely to lead to a solution where the major factors are well estimated by the obtained loadings but where there are also additional poorly defined factors (with few, if any, variables loading well on them). Underfactoring is, instead, likely to lead to factors that are poorly estimated (poor correspondence between the structure of the true factors and that of the estimated factors), which is a more serious problem (Fabrigar, Wegener, MacCallum, & Strahan, 1999).

Based on these premises, it is necessary to point out here that neither the list of Latent Variables nor the tools employed to evaluate the convergent validity are definitive, and therefore they are also likely to be subject to further revisions and adjustments in accordance with the development of the model and the analysis of the literature. After all, as Harrington (2008) has remarked: "*fitting a model is an iterative process that begins with an initial fit, tests how well the model fits, adjusts the model, tests the fit again, and so forth, until the model converges or fits well enough*" (p. 27).

5.10.2 *Confirmatory Factor Analysis*. Further to ESEM, Confirmatory Factor Analysis (CFA) will be employed to validate the factor structure obtained through ESEM and attempt to develop a higher-order structure that will account for one overarching factor, namely Social Justice.

Given the results provided by ESEM, the main objective of CFA is "to obtain estimates for each parameter of the measurement model (i.e. factor loadings, factor variances and covariances, indicator error variances and possibly error covariances) that produce a predicted variance-covariance matrix that represents the sample variance-covariance matrix as closely as possible" (Brown, 2006, p. 72). In other words, in CFA I will be testing whether the model I developed by means of ESEM fits the data. There is a large class of tests for assessing how well a model matches the observed data. One of the most commonly used is the chi-square ($\chi^2$) model, which tests whether the model fits exactly in the population[12]. The null hypothesis is that the implied or predicted covariance matrix $\Sigma$ is equivalent to the observed sample covariance matrix S, $\Sigma$=S. A large $\chi^2$ and rejection of the null hypothesis means that model estimates do not sufficiently reproduce sample covariance, that is to say that the model examined does not fit the data well. By contrast, a small $\chi^2$ and a consequent failure to reject the null

[12] Overall, there is no much difference in terms of sample size requirement between EFA and CFA. less than 100 is generally considered "small" and may only be appropriate for very simple models; 100 to 200 is "medium" and may be an acceptable minimum sample size if the model is not too complex; and greater than 200 is "large", which is probably acceptable for most models (Kline, 2010).

hypothesis is a sign of a good model fit. Other indices of model fit are CFI, TLI, and RMSEA.

## 5.11 Conclusions

The literature on happiness has focused on many important aspects while overlooking the fundamental role that social justice plays in determining people's life. The first part of this study had empirically demonstrated that social justice indeed predicts life satisfaction, even controlling for variables such as GDP, area of the country, size of the population, and government political orientation. These findings support the choice of overcoming some of the shortcomings of the Social Justice Index by developing the Global Index of Social Justice.

This is, however, the first time that such a far-reaching project will be attempted. As shown in the previous pages, there is no example in the literature of an existing comprehensive, overarching, and methodologically sound Global Index of Social Justice. This choice rests on a critical slant, which questions the mainstream approach to quality of life, and also a justice-oriented approach that challenges the current economic measures of country development.

In terms of impact, this project will contribute to inform Governmental practice worldwide on how to advance Social Justice in their own Country and by means of that to enhance the level of life satisfaction and well-being of their citizens. Ultimately, the goal of this project will be to contribute to construct more equal, just hence happier and healthier societies.

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# Appendix A: Table of Leading Party Political Orientation in 2011

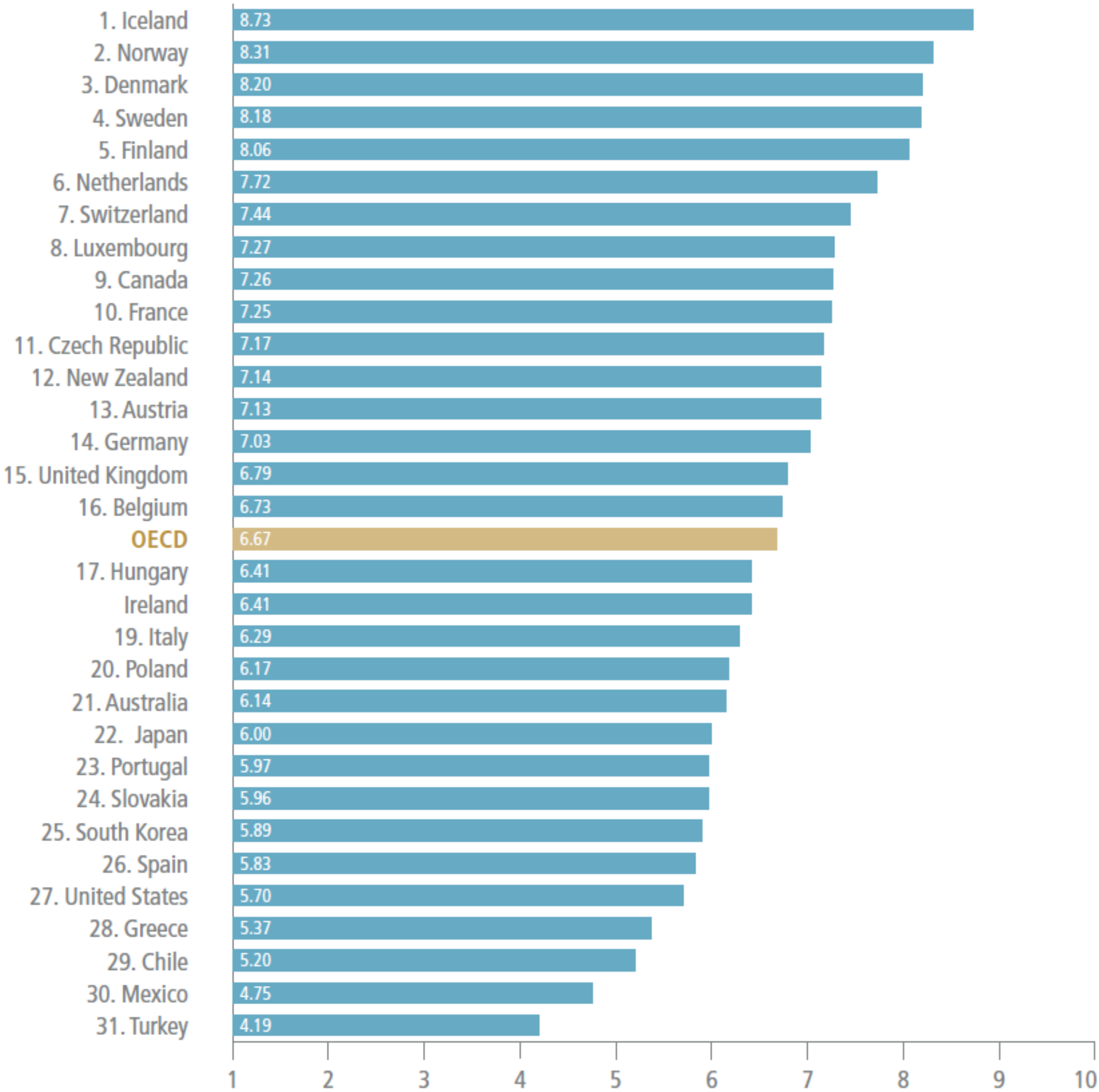
| Country | Political Party | Affiliation/Ideology | Parliament (Number and/or % of representatives) | Senate (Number and/or % of representatives) |
|---|---|---|---|---|
| Australia | Australian Labor Party | Centre-left | House of Representatives: 38.1% | 31 |
| Austria | Social Democratic Party of Austria | Social democracy Centre-left | 29.3% | N/A |
| Belgiium | New Flemish Alliance (N-VA) | Centre-right | Chamber of Deputies: 17.4% | Senate: 19.6% |
| Canada | Conservative Party of Canada | Right-wing | House of Commons: 39.6% | |
| Chile | Alliance for Chile (APC) | Right-wing | Chamber of Deputies: 58 seats | Senate: 9 |
| CzechRep | Czech Social Democratic Party (ČSSD) | Centre-left | Chamber of Deputies: 22.1% | Senate: 41 |
| Denmark | Venstre -Denmark's Liberal Party | conservative-liberal Centre-right | Folketing (Danish Parliament) 26.7% | N/A |
| Finland | National Coalition Party (Kokoomus) | conservative-liberal Centre-right | 20.4% | N/A |
| France | The Republicans [formerly UMP] | Liberal conservatism Centre-right | National Assembly: 46.4% | Senate: 132 |
| Germany | Christian Democratic Union of Germany Christian-Social Union in Bavaria | Christian democracy Liberal conservatism Regionalism Christian democracy Conservatism Centre-right | Bundestag: 33.8% | N/A |
| Greece | Panhellenic Socialist Movement (PASOK) | Democratic socialism Eco-socialism Alter-globalisation Centre-Left | Hellenic Parliament: 43.9% | N/A |

| | | | | |
|---|---|---|---|---|
| Iceland | Social Democratic Alliance | Social democracy<br>Centre-left | Althing (National Parliament of Iceland): 29.8% | N/A |
| Ireland | Fine Gael (FG)<br>Family of the Irish | Liberal conservatism<br>Christian democracy<br>Centre-right | House of Representatives: 36,1% | Senate: 19 |
| Italy | S. BERLUSCONI coalition (PdL, LN, MpA) | Liberal conservatism<br>Christian democracy<br>Regionalism<br>Right-wing populism<br>Centre-right | Chamber of Deputies: 46,8% - 340 seats | Senate: 174 |
| Japan | Democratic Party of Japan (DPJ) | Centre/Centre-Left | House of Representatives: 42.4% - 308 seats | House of Councillors: 31.6%<br>106 |
| Luxembourg | Christian Social People's Party (CSV) | Christian democracy<br>Centre-right | Chamber of Deputies: 38% | N/A |
| Mexico | Institutional Revolutionary Party (PRI) | Liberalism<br>NeoLiberalism<br>Civic nationalism<br>Corporatism<br>Centre/Centre-right | Chamber of Deputies: 237 seats | Senate: 33 |
| Netherlands | People's Party for Freedom and Democracy (VVD) | Conservative liberalism<br>Centre-right | First Chamber: 16 seats | Second Chamber: 20.5% |
| New Zealand | New Zealand National Party | Conservatism<br>Classical liberalism<br>Centre-right | House of representatives: 48% | N/A |
| Norway | Norwegian Labour Party (DNA) | Social democracy<br>Left<br>Centre-Left | Storting (Unicameral Parliament): 35.4% | N/A |
| Poland | Platforma Obywatelska (PO) | Liberal conservatism<br>Christian democracy<br>Centre-right | Sejm: 39.2% | Senate: 63 |
| Portugal | Coalition:<br>Partido Social Democrata (PSD)<br>Social Democratic Party<br>Partido Popular (CDS-PP)<br>People's Party | Liberal conservatism<br>Christian democracy<br>Conservatism<br>Centre-right | Assembly of the Republic (Unicameral): 38,6% | N/A |

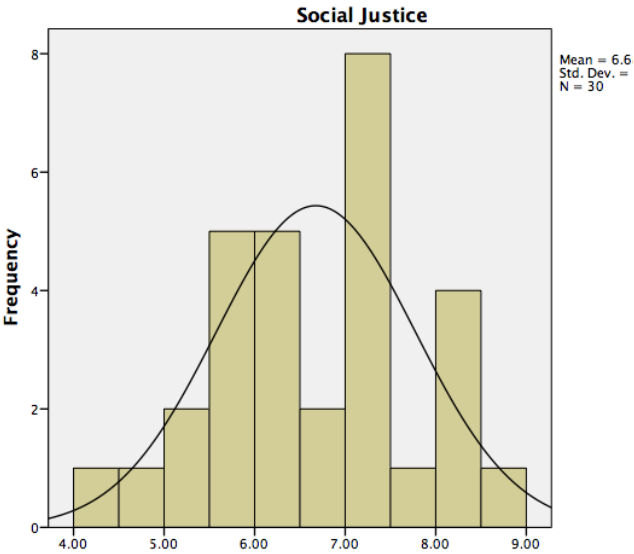
| | | | | |
|---|---|---|---|---|
| South Korea | Saenuri Party, once know as Grand National Party (GNP) | Conservatism Centre-right/Right-wing | National Assembly (Unicameral): 172 seats | N/A |
| Slovakia | Smer - Sociálna Demokracia (SMER-SD) Direction - Social Democracy | Social democracy Centre-left | National Council (Unicameral): 34.8% | N/A |
| Spain | Partido Socialista Obrero Español (PSOE) Spanish Socialist Workers' Party | Social Democracy Federalism Centre-left | Congress of Deputies: 43.9% | Senate: 73 |
| Sweden | Socialdemokratiska Arbetarepartiet (S) Social Democratic Workers' Party | Social democracy Democratic socialism Centre-left | Riksdag: Unicameral: 30.7% | N/A |
| Switzerland | Schweizerische Volkspartei (SVP) Swiss People's Party | National conservatism Right-wing | Federal Council: 28.9% | N/A |
| Turkey | Adalet ve Kalkinma Partisi (AKP) Justice and Development Party | National conservatism Social conservatism Islamism Centre-right | Grand National Assembly of Turkey (Unicameral): 49.8% | N/A |
| UK | Conservative and Unionist Party (CON) | Conservatism Economic liberalism Centre-right | House of Commons: 36,1% | N/A |
| USA | Democratic Party | Liberalism Progressivism Social Liberalism Centre-Left | House of Representatives: 192 seats | Senate: 51 |

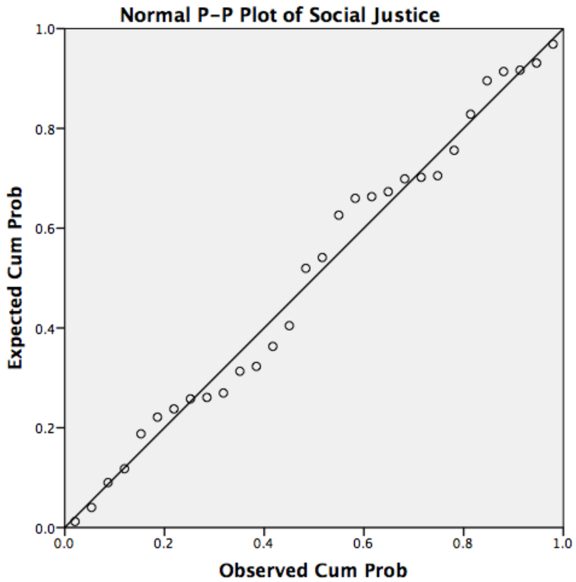
**Sources:** The World Factbook 2011; http://www.parties-and-elections.eu/countries.html**;** http://electionresources.org

## Appendix B: Social Justice Index 2011 in OECD countries

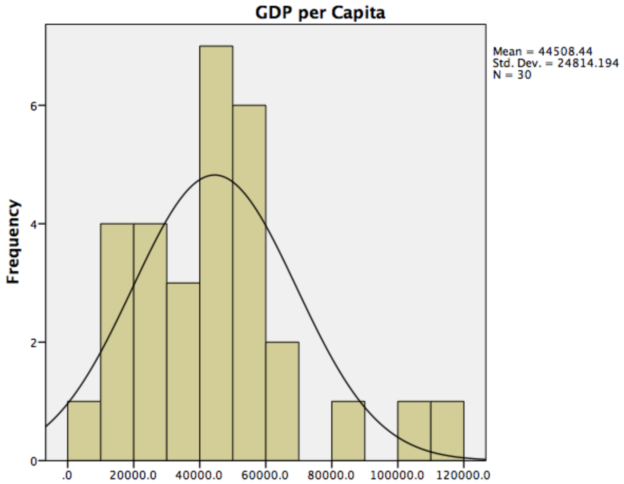


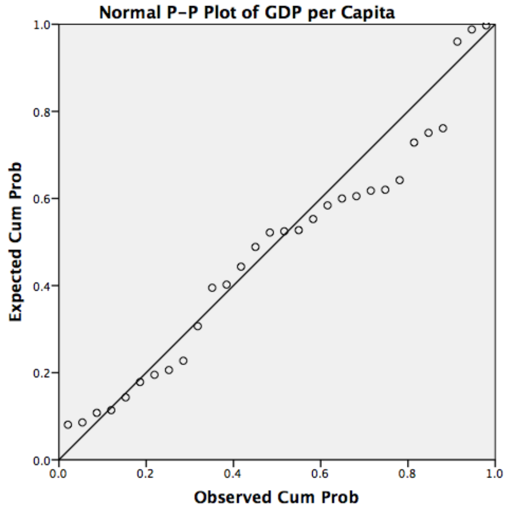
## Appendix C: Histograms (left) with normal curve and P-P plot (right) of the Social Justice, Life Satisfaction, GDP per capita, Area in Km$^2$, and Size of the population scores

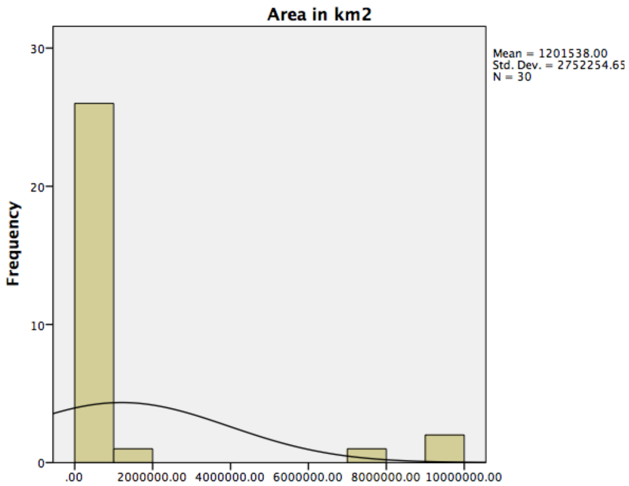


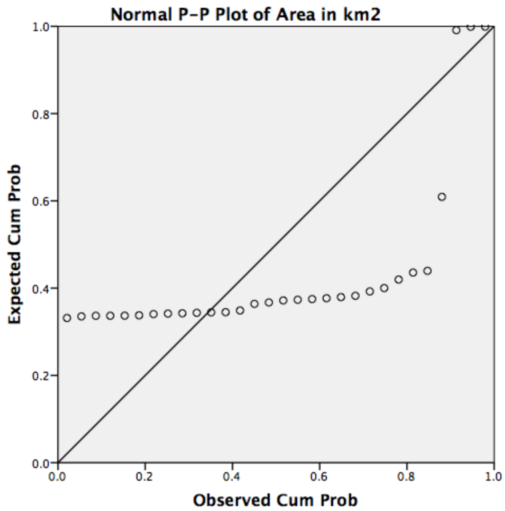



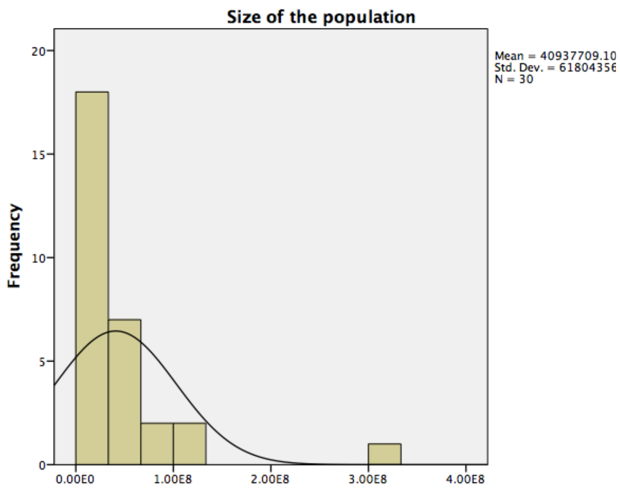


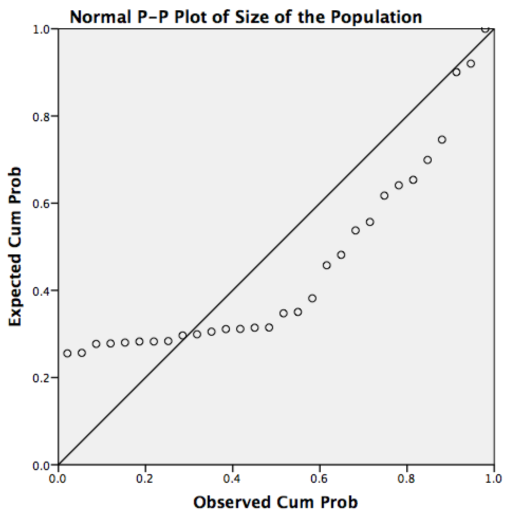

GDP per Capita
Mean = 44508.44
Std. Dev. = 24814.194
N = 30
Frequency
.0
20000.0
40000.0
60000.0
80000.0
100000.0
120000.0


Normal P-P Plot of GDP per Capita
Expected Cum Prob
Observed Cum Prob

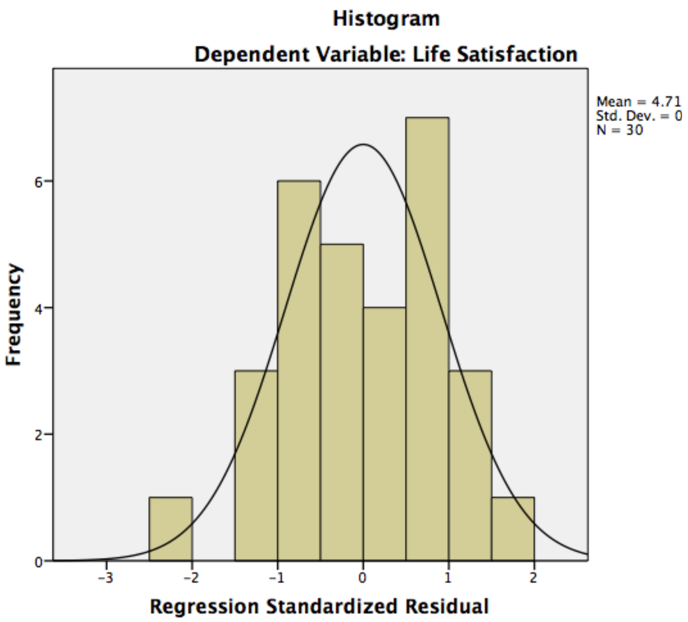

Area in km2
Mean = 1201538.00
Std. Dev. = 2752254.65
N = 30
Frequency
.00
2000000.00
4000000.00
6000000.00
8000000.00
10000000.00

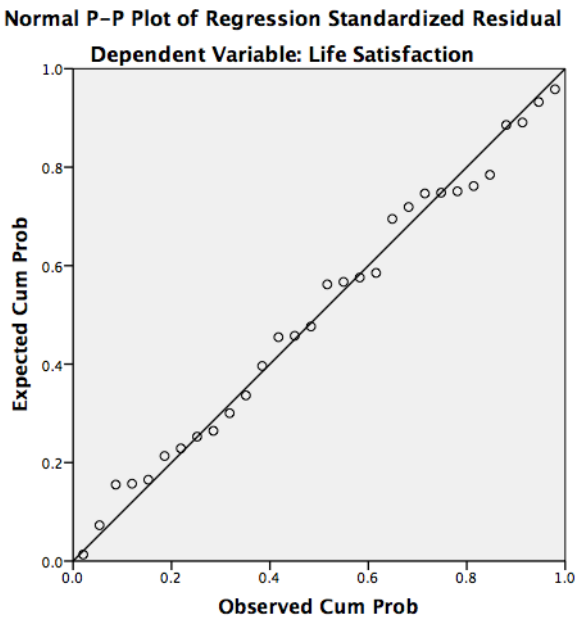

Normal P-P Plot of Area in km2
Expected Cum Prob
Observed Cum Prob

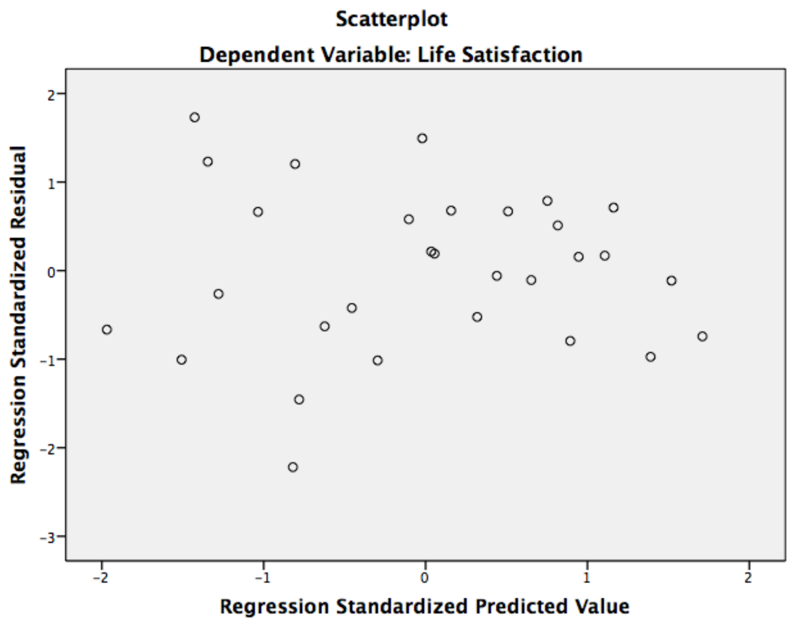

Size of the population
Mean = 40937709.10
Std. Dev. = 6180435€
N = 30
Frequency
0.00E0
1.00E8
2.00E8
3.00E8
4.00E8


Normal P-P Plot of Size of the Population
Expected Cum Prob
Observed Cum Prob

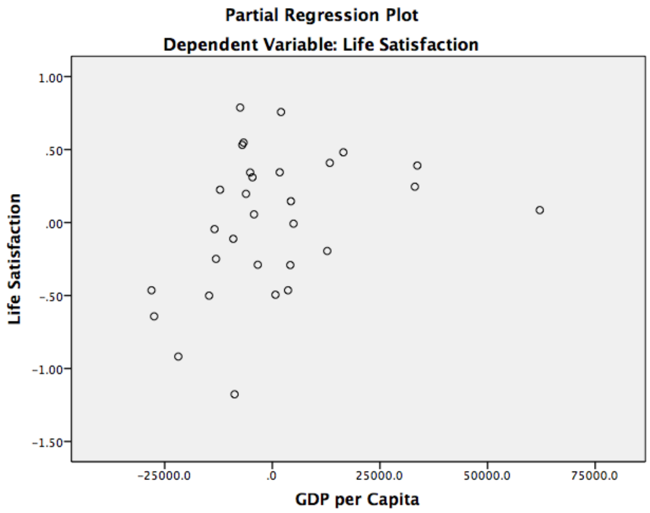
## Appendix D: Histogram and P-P plot of residuals and Plot of standardized predicted values against standardized residuals

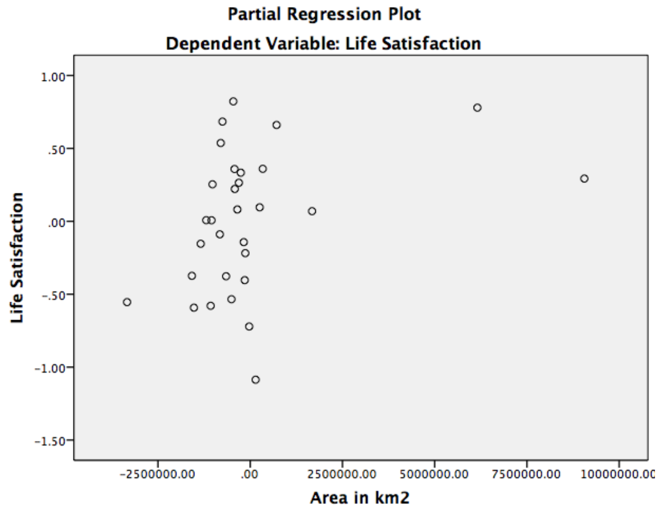


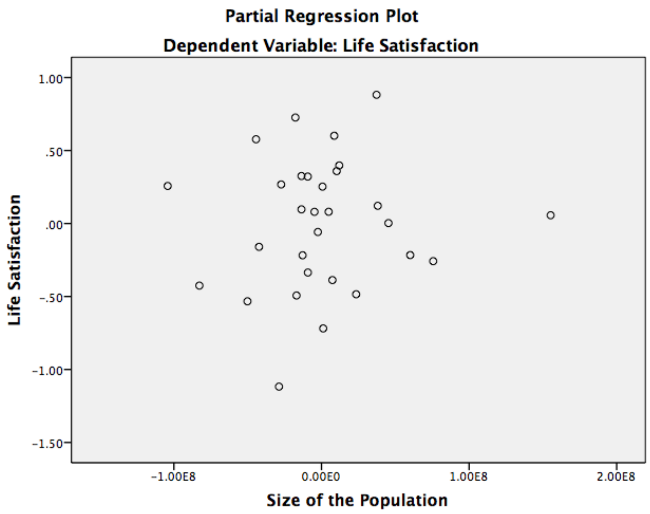



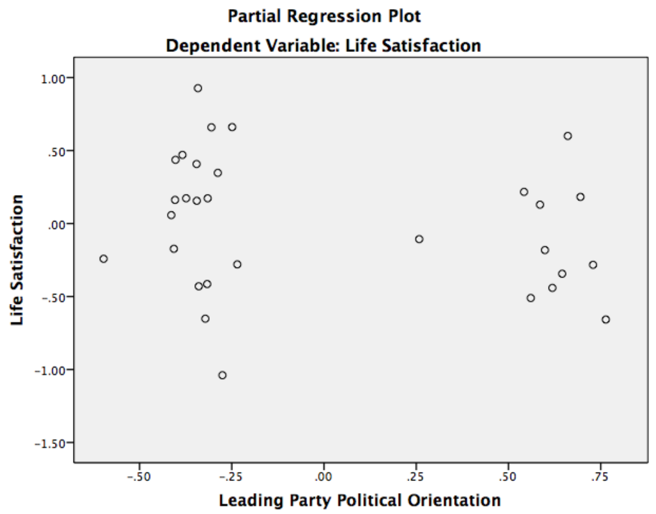



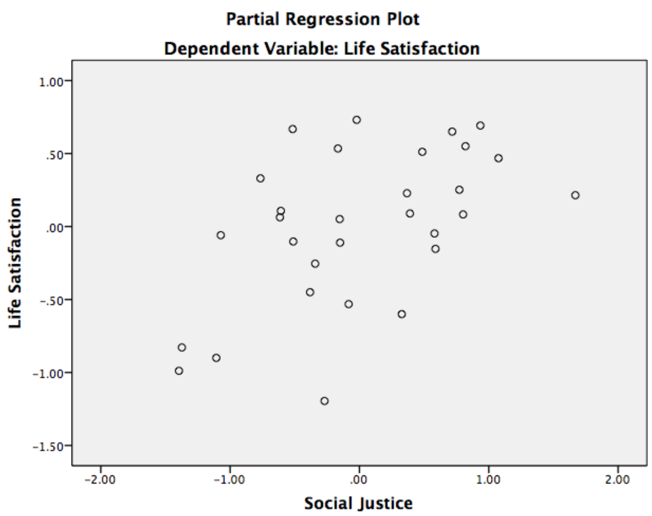
## Appendix E: Partial Plots of GDP per capita, Area in km2, Size of the population, and Leading Party Orientation against Life Satisfaction.



# Study 3:

# Assessing the Ethics of Justice and Care: Italian Validation of the Measure of Moral Orientation Second Revision (MMO-2)


## Abstract

This study presents the adaptation of the Measure of Moral Orientation second revision (MMO-2) to the Italian context. 505 university students were invited to fill out the MMO-2 questionnaire. First Exploratory Factor Analysis (EFA) was employed to tests the capacity of each scenario to yield one factor for Care and one factor for Justice. This first analysis suggested the deletion of 7 items, the crossloading of 3 items, and the re-specification of 2 items. Subsequently, all the remaining items were put together and analysed through Exploratory Structural Equation Modeling (ESEM). The original model did not show adequate fit and therefore it was re-specified in a step-wise manner until reaching a final solution with 4 intercorrelated factors. The multifactorial solution obtained with ESEM was tested again as a hierarchical solution through Second-order Confirmatory Factor Analysis (CFA). Results of CFA confirmed the MMO-2 taps into a multidimensional construct, with 4 correlated factors for both Care and Justice. Convergent and discriminant validity were also tested with two subscales of the Moral Foundation Questionnaire, namely Harm/Care and Fairness/Reciprocity, revealing correlations ranging from low to moderate. Limitation of the MMO-2 and future direction will be discussed.



***Keywords***: Measure of Moral Orientation, Justice, Care, Validation, Structural Equation Modeling

## 6.1 Introduction

Carol Gilligan's proposal of an alternative ethics, namely the ethics of care opened a heated debate within the philosophical and psychological literature (Gilligan, 1982). Gilligan theorized an ethics based on the principle of care in response to the justice-based staged of moral development developed by Lawrence Kohlberg (1981). Her argument rested on the assumption that human beings are motivated sometimes to act fairly and sometimes to help and protect bonds and relationships with other people (Gilligan, 1982).Today the Ethics of care has become an established scholarship with a vast array of publications and studies dedicated to the exploration of how care can be used as an alternative base for a feminine ethics (Barnes, 2012; Held, 2006).

However, over the years the ethics of care has not been spared from criticism (see Rachel J. & Rachel S., 2012; Puka, 1990; Card, 1990). Among these, some authors have highlighted several methodological issues with the work that led Carol Gilligan to positing the Ethics of Care. For instance, Luria (1986) highlighted at least three limitations, that is: relatively small and ill-specified sample size, absence of a reliable objective scoring system, and juxtapositions of disparate samples, which poses problems about combination rules. Likewise, Brabeck (1983) stressed the importance for future research in the ethics of care domain to collect and analyse quantitative data with much bigger samples than the ones Gilligan interviewed. Unarguably, Gilligan's research was qualitative in nature, therefore it had no reason to follow the criteria of quantitative research. However, it is still valid to assume that the use of quantitative data could support the claim for two separate ethics.

Over the years, a number of researchers have attempted to collect quantitative data to shed light on both the ethics of justice and care[13]. Among these a series of tests with functional magnetic resonance imaging (fMRI) have been carried out to investigate the male and females neuronal sensitivity to either justice or care issues (Harenski, Antonenko, Shane, & Kiehl, 2008; Robertson et al. 2007).

Other studies have employed an array of already available instruments to demonstrate the validity of gender differences in moral judgment (Gibbs, Arnold, & Burkhart, 1984). A portion of the scientific investigation into the nature of ethics has dedicated its efforts to develop a number of self-report instruments to assess the care

[13] The latest development within the ethics of care arena have attempted to reintegrate the ethics of justice into the care ethics (see Clement, 1996; Held, 1995; Tronto, 1993)

and justice moral orientation modes. Among these, the following figure prominently: a) The moral justification scale (MJS) (Gump, Baker, & Roll, 2000), b) The Moral Orientation Scale Using Childhood Dilemmas (MOS) (Yacker & Weinberg, 2011), c) The Assessment of Moral Orientation (AMO) (Giammarco, 2014), and d) The Measure of Moral Orientation second revision (MMO) (Liddell & Davis, 1996), soon available in its second revision MMO-2 (Cooper, Liddell, Davis, & Pasquesi, 2012; Liddell, 2006). (see Fig. 1)

| Measure | Validation methods | Sample size | Targeted population | Instrument structure | Measurement scale |
|---|---|---|---|---|---|
| Measure of Moral Orientation (MMO) (Liddell & Davis, 1996) | Principal Components Factor analysis. Convergent and discriminant validity tests. Reliability analysis. Test-retest correlation after 3 weeks | 381 North Americans, 133 male and 248 female with a median age of 20, | University students from a public, Midwestern university | 9 written vignettes. 69 items (35 for care and 34 for justice)<br><br>14 items self-description inventory (7 items for justice and 7 items for care respectively) | 4-point Likert scale, from 1 (strongly disagree) to 4 (strongly agree) |
| Moral Justification Scale (MJS) (Gumpt, Baker, & Roll, 2000) | Items reliability assessed by expert judges. Reliability test. Split-half reliability test after 2 weeks. | 40 Mexican Americans and 40 Anglo Americans, 20 males and 20 females in each group. Average age = 18.9 years (*SD* = 7.4) | University students from a large state university in South California | 6 written vignettes. 8 items per vignette (4 for care and 4 for justice respectively) | 10-point self-anchoring scale, from 1 (not at all important) to 10 (very important) |
| Moral Orientation Scale Using Childhood Dilemmas (MOS | Items reliability assessed by three judges. Item analysis. Discriminant validity. Test-retest reliability after 2-3 weeks. reliability. | 99 adults (49 male and 50 female). Average age = 27 years | University students from a private, metropolitan university | 12 written moral dilemmas. 4 alternatives per dilemma | Respondents are asked rank each alternative in order of preference |
| Assessment of Moral Orientation (AMO) | Item Level Analysis. Principal Axis Factoring and Parallel analysis test. Reliability Analysis. Convergent and Discriminant validity tests | 326 North American adults (92 male and 233 female, 1 unspecified). Mean age = 37.59 (*SD* = 11.99) | Participants were recruited online via Crowdflower.com | 6 written moral dilemmas in the form of vignettes. 34 items included for 3 factors, namely care, justice, or self-promotion | 5-point Likert scale, from 1 (extremely unlikely) to 5 (extremely likely) |

Fig. 1. Features of the main available instruments for the assessment of justice and care moral orientation

This study will attempt to introduce one of these instruments to the Italian context. In fact, the Italian literature is not equipped yet with a tool for assessing care and justice moral orientation. After analysing each of the above scales, the choice has fallen on the Measure of Moral Orientation second revision (MMO-2). In fact, the first two instruments introduced above have both limitations that would make them suitable options for adaptation to the Italian context. In particular, the MOS has been designed for adults who are asked to imagine that they have an 8- to 10-year-old child who is facing a series of moral dilemmas. Apart from the exclusivity of the sample, this instrument has been validated only on a sample of 99 graduate students and the responses were coded by an expert with experience in Lyons's[14] coding scheme (1982).

Likewise, The MSJ construct validity was judged by a group of experts and the sample involved only 100 participants. Lastly, the AMO seemed to be a good candidate for a more robust instrument, given its statistical validation and the sample size. However, this tool needed further revisions, as stated by the author in the conclusion of the study, and to this date no other updated version has been released.

Against this background, the MMO stands out as the only scale for the assessment of justice-care orientation that has been validated on an adequate sample size (331 participants in the latest validation study) as well as undergoing statistical analysis for testing its construct validity, including convergent and discriminant validity.

Since the MMO second revision (MMO-2) has not been tested yet for validation, this represents a good opportunity to explore the proprieties of this instrument on a sample of Italian people. Therefore, the next pages shall address in detail the psychometric validity of the MMO-2.

## 6.2 The research

6.2.1 *Back-translation*. The first step involved the translation of the MMO-2 in Italian. Afterwards the instruments had to be translated back to English and compared to its original version. This procedure was carried out by two independent researchers and overseen by the author of this study. The back-translation generated a high general

[14] Based on Gilligan's work, Lyons developed a scoring system for coding the interviews according to the justice or care orientation.

agreement on the majority of items composing the MMO-2. It also provided some useful suggestions to improve the language standard of some of the items.

6.2.2 *Participants*. 505 university students at the University of Naples Federico II (Italy) took part to this research. The respondents had an average age of 22.5 (SD = 2.793) and were recruited from a number of faculties, among which Psychology (24.8%), Law (12.7), Biology (14.9%), Politics (16%), Engineering (16%), Medicine (10.7), and other (5%). The faculties were chosen on the basis of their curricula. The aim was to balance the sample between faculties with a humanistic curriculum such as Psychology, Politics, and Law (56.4%) and those with a technical approach such as Medicine, Biology, and Engineering (43.6%).

The sample was also balanced for Gender. However, a slight higher number of female subjects offered to answer the questionnaire (60.4% against 39.6% of males). 75.2% of the total sample was enrolled on a Bachelor's degree and 24.8% on a Master's degree. Participants were not paid for filling out the questionnaire. However, they were promised to received a feedback with the research results after the completion of the research in order to increase their compliance to the study.

6.2.3 *Instruments and Procedures*. The measure of Moral Orientation (MMO) is a tool for the assessment of person's moral voice. Originally designed by Debora Liddell (1990) and validated by Liddell, Halpin G., and Halpin W. (1992, 1993), the MMO reached its latest version in a study conducted by Liddell and Davis (1996) that aimed to collect further reliability and validity evidence. The final scale was composed of 10 moral dilemmas with 79 items in total. Each scenario included in the test was designed to be close to the experience of college students.

More specifically, a series of vignettes were constructed to portray a situation of conflict where the protagonist had to make a moral decision, which could be based either on justice or care principles. All the items of the MMO-2 were rated on a 4-point Likert scale, ranging from 'strongly disagree' to 'strongly agree' to which respondents are asked to express their preference. In addition to the scale, a 14-item self-description inventory was designed to tap into the respondents' perceptions of themselves as just and/or caring people (7 items for self-justice and 7 items for self-care respectively).

The MMO-2 is a newly revised version of the MMO, which was developed by Liddell (2006). Compared to its previous version, the scale includes only 7 vignettes and 52 items (26 for care orientation and 26 for justice orientation) and it also dropped the self-description inventory.

Two subscales, namely Harm/Care and Fairness/Reciprocity, from the Moral Foundation Questionnaire (MFQ) were employed to test for convergent validity. The MFQ is a tool developed by Haidt and colleagues (2011) that taps into five avowedly universal moral domains, that is: Harm/care, Fairness/reciprocity, Ingroup/loyalty, Authority/respect, and Purity/sanctity. For this study, I used the Italian adaptation of the MFQ developed by Bobbio, Nencini, and Sarrica (2011).

With regard to the administration of the instruments, participants were approached by two researchers and invited to fill out a pen-and-pencil questionnaire. Only a general overview of the research scopes was provided to the respondents in order not to influence their answers. The data so collected were manually entered into a computer software spreadsheet and checked for validation.

6.2.4 *Software*. In this study, all the statistical analyses were conducted with Mplus 7.0, except for descriptive statistics, which was performed by means of IBM Spss 20.

## 6.3 Data Analyses and Results

This study has involved a number of statistical analyses to assess the validity of the MMO-2. In the first phase I followed the approach used by Giammarco (2014) who performed a series of exploratory factor analyses with principal axis factoring (PAF) with oblique rotation as well as parallel analysis test (O'Connor, 2000) to assess the number of factors to be extracted. The results of Giammarco's study suggest that it is more beneficial to examine the structure of the MMO-2 at the scenario level - that is extracting from each dilemma taken individually both a factor for justice and a factor for care - and to conceptualize the scenarios as parallel forms.

Based on these findings, I first used Exploratory Factory Analysis (EFA). Following the results of EFA, Exploratory Structural Equation Modeling (ESEM) was performed to test whether the care and justice factors extracted from each scenario of the MMO-2 could be included in a single model with 14 factors (from just1 to just and 7 and from care1 to care7). Lastly, Second Order Confirmatory Factor Analysis was employed to check whether the 7 care and justice factors could be better explained by two hierarchical factors, namely Care and Justice.

Given the categorical nature of all the items composing the MMO-2, all the analyses conducted in this study have been based on weighted least square parameter estimates (WLSM), which has been proven to handle categorical variables much better than Maximum Likelihood (ML) (Asparouhov & Muthen, 2007). With regard to the goodness of fit indices, for this study Chi-Square ($\chi^2$), root mean square error of approximation (RMSEA), TLI (Tucker-Lewis Index), Bender's Comparative

Fit Index (CFI), and Standardized root mean squared residual (SRMR) will be employed (for a general review see Hooper, Coughlan, & Mullen, 2008). Given the Chi-Square sensitivity to large sample size (Bentler & Bonnet, 1980) in this study it always appears to be non-significant at the 5% level. Therefore, we will focus more on the other indices of model fit.

According to Hu and Bentler (1999), a cut-off value of .06 or below is suggested for RMSEA, with confidence intervals values close to 0 for the lower limit and less than .08 for the upper limit. As for CFI and TLI, values above .95 are generally recognized as indicative of good fit. Lastly, values of up to .08 are deemed acceptable for SRMR.

### 6.3.1 *MMO-2 Construct validity through Exploratory Factor Analysis*

Exploratory Factor Analysis, which is originally credited to Spearman (1904), is a multivariate statistical procedure largely employed in social research in general and psychology in particular (Thompson, 2004; Ford, MacCallum, & Tait, 1986). Brown and Onsman (2012) have highlighted the primary features of EFA in the following three points: 1) first EFA reduces a large number of variables into a smaller set of variables (also referred to as factors), 2) it establishes underlying dimensions between measured variables and latent constructs, thereby allowing the formation and refinement of theory and 3) it provides construct validity evidence of self-reporting scales (p. 2).

EFA is often used as first step for testing the validity of self-reported questionnaires (Costello & Osborne, 2005), subsequently followed by more confirmative procedures such as Confirmatory Factor Analysis. In fact, unlike the latter, EFA does not make any assumption regarding the number of factors to extract, thereby making it an elated procedure for exploratory purposed (Schumaker & Lomax, 2010). Given its features, we start this study by applying EFA to each scenario of the MMO-2 taken individually. This procedure will allow to test how many factors each scenario is likely to yield.

6.3.1.1 *Deleted Items*

Item5 was deleted due to a cross-loading on the Care Factor ($\lambda$ = -.235) and high residual variance (.847). This choice has greatly improved the model fit indices. In fact, the model with item5, exhibited poor fit: $\chi^2$ (11.697), Df = 4, p < .05, RMSEA = .062 (.022, .105), prob < .05 = .263, CFI = .958, TLI = .841, SRMR = .028. Conversely, the model without item5 exhibited close fit: $\chi^2$ (.671), Df = 1, p < .05, RMSEA = .000 (.000 .110), prob < .05 = .644, CFI = 1.000, TLI = 1.023, SRMR = .008.

The reason why item5 was so problematic could be justified by the fact that ‘being objective’ in the matter of ‘moral dilemmas’ only partially accounts for an orientation to justice.

Item9 exhibited a low loading ($\lambda$ = .262) on the Justice Factor and a high residual variance (.887). This would suggest eliminating this item. However, its deletion substantially decreases the goodness of fit of the model. In fact, the model with item9 included exhibited a good fit: $\chi^2$ (48.623), Df = 19, p < .001, RMSEA = .056 (.037, .075), prob < .05 = .287, CFI = .980, TLI = .961, SRMR = .033. Conversely, the model without item9, as already mentioned, shows a substantial drop in the model fit: $\chi^2$ (43.636), Df = 13, p < .001, RMSEA = .069 (.047, .092), prob < .05 = .078, CFI = .977, TLI = .951, SRMR = .034.

If we examine this item in detail, we notice that it bears a resemblance with item5, which was deleted from the previous model. In addition to item5, item9 states to ‘not let my relationship cloud my judgment’, which provide more information to the reader about what it actually means to be objective in a moral dilemma. This could explain the slightly higher value of $\lambda$ for item9 compared to item5 as well as the reason behind the decreased goodness of fit when item9 is deleted.

In the light of the above argument, I decided to keep item9 in the construction of the Italian MMO-2, whilst still being aware of its likely problematic impact on future analyses.

Item16, which was originally intended for the Justice Factor, exhibited a low loading ($\lambda = .291$) for this Factor, and in addition a cross-loading on the Care Factor ($\lambda = .327$), along with a high residual variance (.851). The deletion of this item, improves all model fit indices. In fact, the model with item16, exhibited poor fit: $\chi^2$ (28.595), Df = 8, p < .001, RMSEA = .072 (.044, .101), prob < .05 = .090, CFI = .980, TLI = .946, SRMR = .037. Conversely, the model without item5 exhibited close fit: $\chi^2$ (8.722), Df = 4, p = .068, RMSEA = .049 (.000  .93), prob < .05 = .452, CFI = .995, TLI = .981, SRMR = .025.

The analysis of this item shows that it is poorly discriminant in terms of Justice or Care orientation. In fact, describing a situation as a matter of conflicting rights is very close to stating the obvious, therefore it does not necessarily prompt people to take a moral stance. The ambiguous ambiguous nature of this item could account for a confusion generated in the respondents, who sometimes have chosen to valuate the situation in terms of Justice, and on other occasions in terms of Care.

Item29 was deleted due to a low loading ($\lambda = .257$) on the Care Factor and a high residual variance (.934). Being very similar in nature to item16, it is not surprising that this item is as much problematic as its counterpart. The deletion of item29, also improves consistently the model fit indices. In fact, the model with item29 included, exhibited poor fit: $\chi^2$ (63.765), Df = 13, p < .001, RMSEA = .088 (.067,  .111), prob < .05 = .002, CFI = .974, TLI = .944, SRMR = .077. Conversely, the model without item29 exhibited better fit: $\chi^2$ (3.130), Df = 8, p < .01, RMSEA = .074 (.047, .103), prob < .05 = .068, CFI = .988, TLI = .970, SRMR = .034.

Item33 exhibited a low loading ($\lambda = .217$) on the Justice factor, a cross-loading on the Care factor ($\lambda = .237$), and a high residual variance (.955). The reason why this item has been probably misinterpret by our respondents lies in the fact it it is not sufficiently clear about what kind of principles it refers to. Indeed, those who are concerned about principles of Justice, would rate this item higher on the Justice line. On the other hand, those who are more preoccupied about principles of Care, would rate it more on the Care side. This conceptual and statistical ambiguity suggests the deletion of this item, despite the slight decrease in the goodness of the fit in the model. In fact the model with item33 included, exhibits excellent fit: $\chi^2$ (2.888), Df = 4, p = .5767, RMSEA = .000 (.000,  .058), prob < .05 = .910, CFI = 1.000, TLI = 1.003, SRMR = .011, whereas the model without item33, shows lower , albeit very close, fit: $\chi^2$ (1.674), Df = 1, p = .1958, RMSEA = .037 (.000, .131), prob < .05 = .439, CFI = 1.000, TLI = .995, SRMR = .008.

Item49 is uncorrelated with both the Care factor and the Justice Factor and shows a high residual variance (.982). This is probably due to the fact that deciding which parent to spend time with on the basis of how much each of them needs the person who is faced with this moral dilemma, is perceived as neither an act of justice nor care. As expected, the deletion of item49 highly increases the model fit. In fact, the model with item49 included shows the following model fit indices: $\chi^2$ (45.768), Df = 13, p < .01, RMSEA = .071 (.049, .094), prob < .05 = .055, CFI = .980, TLI = .957, SRMR = .040, whereas the model without item49, shows consistent improved fit: $\chi^2$ (19.325), Df = 8, p = .0132, RMSEA = .053 (.023, .084), prob < .05 = .386, CFI = .993, TLI = .982, SRMR = .026.

Item 51 shows a crossloading on the Justice factor ($\lambda$ = .306). This item, which was originally intended to load only on the Care factor, has probably some bearing on the orientation to justice as well. This could be justified, in terms of Care, by the fact that someone would not want to hurt his/her mother despite her possible faults. On the other hand, those who are more orientated to justice, might have interpreted this item as morally wrong to judge someone on the basis of who she decides to be with. The deletion of the item, further improves the model fit, following on from dropping item49 (see above). In fact, without this item the goodness of fit of the model is as follow: $\chi^2$ (8.920), Df = 4, p = .0631, RMSEA = .050 (.000, .094), prob < .05 = .437, CFI = .996, TLI = .984, SRMR = .02. Therefore, item51 will be excluded from future analyses.

6.3.1.2 *Cross-loadings*

Item18 was designed to load only on the Care Factor. However, EFA shows that this item also, although loads positively on Care ($\lambda$ = .490), also loads negatively on the Justice Factor ($\lambda$ = -.393). The reason accounting for that could be that item18 describes a condition in which the more someone agree to take care of Morgan, the less respects the right of his/her parents to know the truth about Morgan’s health.

Item37 was intended to load on the Care Factor. However, from the EFA this item loaded higher on the Justice factor ($\lambda = .515$) than on the Care Factor ($\lambda = .380$). It is not easy to explain this result. One possible cause for this could be that the respondents have attributed, on this occasion, more value of the Justice side of this item and still a certain degree of care for a brother who they would like to protect from harm. In terms of statistical validity, the deletion of this item does not significantly alter the excellent goodness of fit of this model, it only shows a slight low decrease. In the first case, in fact, the model with item 37 included shows the following indices: $\chi^2$ (9.377), Df = 13, p = .7439, RMSEA = .000 (.000, .032), prob < .05 = 1.000, CFI = 1.000, TLI = 1.002, .6629, RMSEA = .000 (.000, .042), prob < .05 = .979, CFI = 1.000, TLI = 1.001, SRMR = .011. Given the above considerations, we will not drop this item for the time being.

6.3.1.3 *Redefined items*

Item13 was originally intended to be an item for the Justice Factor. However, EFA showed this item to load much higher on the Care Factor ($\lambda = .632$). Trying to find an accommodating solution that would cause the least harm to both parties, seems to be much closer to the principles of Care than to the ones of Justice.

Although item25 was designed to account for the moral orientation to Justice, it was not originally intended to loads negatively on this Factor ($\lambda = -.412$). However, the phrasing of this item, shows that Karen's actions are probably judged as a infringement of the rules, therefore she is not entitles to 'her own business'. On the contrary she is accountable for her conduct from a moral perspective orientated to Justice principles. This line of reasoning could explain the negative factor loading.

Despite this unaccounted result, if this item were to be deleted, the model goodness of fit would decrease, especially with regard to the RMSEA, which from .074 (.047, .103), would go up to .077 (.040, .118). Therefore, item25 will be kept for future analyses.

Item28 was designed to be an item of Care. However, EFA revealed that this item is better understood in terms of Justice. In fact, the factor loading for Care yields an $\lambda$ of -

.029 with a p value non significant at the 5% level, whereas the one for Justice shows a significant λ of .390.

### 6.3.2 *MMO-2 Construct validity through Exploratory Structural Equation Modeling*

Exploratory Structural Equation Modeling is a recently developed statistical technique that combines the features of Exploratory Factor Analysis (EFA) with those of Confirmatory Factor Analysis (CFA) (Asparouhov & Muthen, 2009). One of the advantages of ESEM is that, although the researcher can specify a set number of factors to extract like in CFA, factors are allowed to be rotated and items to crossload like in EFA. In this study ESEM has proven a valuable instruments to test the construct validity of the MMO-2, as we shall better see in the next pages.

#### 6.3.2.1 *Model specification and Model re-specification*

As expected, Model1 exhibited very similar fit indices as the ones yielded by the EFA for the first scenario. Therefore, this first model, will be used as an entry point for building the whole structure of the MMO-2 with ESEM.

The addition, in Model2, of the second factor for Justice and Care, creates a condition where the residual covariance matrix (theta) is not positive definite. This is due, in particular, to the presence of item2. The deletion of this item entails eliminating the first factor for Justice, as there cannot be a factor with less than 2 exogenous variables. It would also lead to the elimination of Care1, since it is related to the Justice Factor for the first vignette.

In terms of statistical significance, this choice is supported by the improved goodness of fit of the model without Justice1 and Care1. In fact, the model that includes these two factor exhibits the following fit indices: $\chi^2$ (132.440), Df = 61, $p < .01$, RMSEA = .048 (.037, .060), prob < .05 = .579, CFI = .963, TLI = .944, WRMR = .795, whereas the model without them, shows better fit: $\chi^2$ (48.623), Df = 19, $p < .01$, RMSEA = .056

(.037  .075), prob < .05 = .287, CFI = .980, TLI = .961, WRMR = .636. Based on the above argument, Justice1 and Care2 will be deleted from the analysis.

Model3 includes the factors Justice3 and Care3. In this new model, item9 shows a low factor loading on Justice ($\lambda$ = -.195) and an $R^2$ of 1.0. Deleting this item, would improve all the fit indices of this model. In fact, the model with the includes item9 exhibits the following fit indices: $\chi^2$ (173.196), Df = 73, p < .01, RMSEA = .052 (.042  .062), prob < .05 = .337, CFI = .964, TLI = .948, WRMR = .864, whereas the model without them, shows a slight better fit: $\chi^2$ (14.260), Df = 61, p < .01, RMSEA = .051 (.040,  .062), prob < .05 = .428, CFI = .970, TLI = .956, WRMR = .816.

The choice of deleting item9 is also supported by the result of the preliminary EFA, which confirmed the very low factor loading for this item. On that occasion, item9 was not deleted due to the decreased goodness of fit of the model for that analysis. However, since this ESEM is analysing the items in a broader picture that includes all factors together, it better shows the advantage of eliminating item9 in the validation of the MMO-2. Based on the above argument, item9 will be deleted from the analysis.

Compared to the previous Model, the goodness of fit has slightly, in particular with regard to the CFI, the TLI, and the WRMR. However, the RMSEA has also slightly improved. Since there is no Modification Indices that would significantly further improve this model, no other change will be made.

Model4 includes the factors Justice4 and Care4. Compared to the previous one, this model exhibits a substantial drop in the goodness of fit: $\chi^2$ (422.449), Df = 159, p < .01, RMSEA = .058 (.051  .064), prob < .05 = .031, CFI = .949, TLI = .933, WRMR = .1.007. If we analyse this model, we notice that item25 shows a low factoring loading, albeit not excessively low, on Justice ($\lambda$ = -.310) and a crossloading on Care ($\lambda$ = .260). In addition this item accounts only for .195 of $R^2$ with a residual variance of .805. Deleting this item would improve all the model fit indices, especially with regard to the CFI, TLI, and WRMR: $\chi^2$ (371.918), Df = 141, p < .01, RMSEA = .057 (.050, .064), prob < .05 = .047, CFI = .954, TLI = .938, WRMR = .977. Therefore item25 will be excluded for future analysis. No Modification Indices can be found that would significantly improve this model.

Model5 includes the factors Justice5 and Care5. The addition of these two factor, highly improves the goodness of the fit of this model: $\chi^2$ (522.411), Df = 230, p < .01, RMSEA = .050 (.045, .056), prob < .05 = .448, CFI = .958, TLI = .945, WRMR = .944. No Modification Indices can be found that would significantly improve this model.

Model6 includes the factors Justice6 and Care6. The addition of these two factor further improves the goodness of fit of the overall model: $\chi^2$ (892.502), Df = 427, p < .01, RMSEA = .047 (.042, .051), prob < .05 = .899, CFI = .963, TLI = .954, WRMR = .961.The Modification Indices for this model show that item22 could reduce the value of $\chi^2$ by 64.559, if we let it load on Justice6. However, given that the overall goodness of fit for this model is within the cut-off point suggested by Hu and Bentler (1999) it would be wiser to wait for the addition of the last two factors, before acknowledging the crossloading.

Model7 includes the factors Justice7 and Care7. The addition of these two factors further improves the goodness of fit of the overall model: $\chi^2$ (1119.012), Df = 609, p < .01, RMSEA = .041 (.037, .045), prob < .05 = 1.000, CFI = .965, TLI = .958, WRMR = .923. Turning to the Modification Indices, item22 is still highlighted as a possible crossloading on Justice6, with a decreased $\chi^2$ of 63.537. However, the addition of this item to Justice6 does not translate in a relevant factor loading ($\lambda$ = -.071, p = .717), despite the increase in the overall goodness of fit of the model: $\chi^2$ (1062.245), Df = 607, p < .01, RMSEA = .039 (.035, .043), prob < .05 = 1.000, CFI = .969, TLI = .962, WRMR = .896. Therefore, no further improvement to the model will be applied.

In Model8 we turn our attention again to the factors Justice4 and Care4. Since the inclusion of these tow factors in Model4 decreased substantially the goodness of fit of the overall model, we decided to examine the estimated correlation matrix for the latent variables to find out whether a lack of correlation between these factors and the ones from other vignettes, can be accountable for the decrease in model fit. As the table 1 shows, the factor Justice4 is only correlated with Justice2 (.150) and Justice5 (.147), whereas the factor Care4 is correlated with Care3 (.267), Care5 (.256), and Care7 (.233).

This figure suggests that the fourth scenario - where respondents are faced with the situation concerning Katia - does not relate with the other moral dilemmas used in the

MMO-2. In addition to this, if we deleted Care4 and Justice4, the goodness of fit of the overall model would highly improve: $\chi^2$ (721.030), Df = 427, $p < .01$, RMSEA = .037 (.032, .042), prob < .05 = 1.000, CFI = .975, TLI = .969, WRMR = .866. Therefore, the fourth scenario will be deleted from further analyses.

## Table 1. Estimated Correlation Matrix for the Latent Variables for Model8

Note: Inter-factor correlations for Justice4 highlighted in blue, Inter-factor correlations for Care4 highlighted in yellow. Inter-factor correlations with $p < .05$ in boldface

| *Factor* | JUST2 | CARE2 | JUST3 | CARE3 | CARE4 | JUST4 | CARE5 | JUST5 | CARE6 | JUST6 | CARE7 | JUST7 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| JUST2 | 1.000 | | | | | | | | | | | |
| CARE2 | -.224 | 1.000 | | | | | | | | | | |
| JUST3 | **.111** | .039 | 1.000 | | | | | | | | | |
| CARE3 | **.517** | **.507** | **-.194** | 1.000 | | | | | | | | |
| CARE4 | **.333** | -.032 | **.267** | **.267** | 1.000 | | | | | | | |
| JUST4 | **.150** | **.398** | -.009 | **.563** | **-.248** | 1.000 | | | | | | |
| CARE5 | **.406** | **.141** | .097 | **.458** | **.256** | **.304** | 1.000 | | | | | |
| JUST5 | -.036 | .108 | **.255** | -.015 | .012 | **.147** | **-.599** | 1.000 | | | | |
| CARE6 | .061 | **.362** | .023 | **.312** | -.061 | **.438** | **.216** | .003 | 1.000 | | | |
| JUST6 | **.271** | **-.143** | **.122** | **.261** | **.259** | -.009 | .111 | .103 | **-.693** | 1.000 | | |
| CARE7 | **.380** | .007 | .017 | **.456** | **.233** | **.135** | **.264** | -.041 | **.261** | .088 | 1.000 | |
| JUST7 | -.080 | **.285** | **.248** | .246 | .135 | .203 | .111 | **.352** | **.434** | .044 | .160 | 1.000 |

In Model9 we look at the $R^2$ of all items together. On this instance, item21 stands out as the one with a particularly low value (.189). Deleting this item would further improve the model fit: $\chi^2$ (623.516), Df = 397, p < .01, RMSEA = .034 (.029, .039), prob < .05 = 1.000, CFI = .980, TLI = .976, WRMR = .822. Therefore, this item will be dropped from the model.

In model 10, we turn our attention again to the correlation matrix for the latent variables. As we can notice from table below, the factor Justice6 significantly correlates only with Justice7 (.452). Regarding Care6, this factor is nearly uncorrelated with all the other Care factors, apart from a very low significant correlation with Care2 (-.151).

**Table 2. Estimated Correlation Matrix for the Latent Variables for Model10**

| *Factor* | JUST2 | CARE2 | JUST3 | CARE3 | CARE5 | JUST5 | JUST6 | CARE6 | CARE7 | JUST7 |
|---|---|---|---|---|---|---|---|---|---|---|
| JUST2 | 1.000 | | | | | | | | | |
| CARE2 | -.218 | 1.000 | | | | | | | | |
| JUST3 | .102 | .051 | 1.000 | | | | | | | |
| CARE3 | .475 | .562 | -.241 | 1.000 | | | | | | |
| CARE5 | .421 | .144 | .104 | .450 | 1.000 | | | | | |
| JUST5 | -.016 | .117 | .249 | -.088 | -.552 | 1.000 | | | | |
| JUST6 | .082 | .357 | .063 | .482 | .232 | .018 | 1.000 | | | |
| CARE6 | .267 | **-.151** | .081 | .065 | .108 | .100 | -.677 | 1.000 | | |
| CARE7 | .380 | .000 | .018 | .443 | .268 | -.029 | .269 | .088 | 1.000 | |
| JUST7 | -.054 | .275 | .261 | .305 | .125 | .354 | **.452** | .043 | .207 | 1.000 |

Note: Inter-factor correlations for Justice4 highlighted in blue, Inter-factor correlations for Care4 highlighted in yellow. Inter-factor correlations with *p* < .05 in boldface

This picture suggests that we should remove these two factors from the construction of the MMO-2. This choice slightly decreases the goodness of fit of the overall model: $\chi^2$ (361.240), Df = 208, p < .01, RMSEA = .038 (.032, .045), prob < .05 = 1.000, CFI = .976, TLI = .966, WRMR = .814. However, all the model fit indices are still within the limits suggested by Hu and Bentler (1999).

The analysis of the correlation matrix for the latent variables shows only a few significant correlations between the Justice factors (yellow boldface), ranging from a minimum of .252 for Justice3-Justice5 and a maximum of .361 for Justice5-Justice7.

Likewise, the Care factors are only occasionally significantly correlated (blue boldface), albeit showing higher values than their counterpart, with a minimum significant value of .379 for Care2-Care7 and a maximum value of .475 for Care2-Care3. Correlations between the Justice factors and Care factors (green boldface) range from a minimum of .144 for Care5-Justice2 and a value of .558 for Care3-Justice2.

The correlation matrix also shows the presence of two negative correlations between factors related to the same scenario - namely, Care2-Justice2 (-.231), Care5-Justice5 (-.540). Moreover, Care4-Justice4 and Care6-Justice6 - which were previously excluded from the analyses given their impact on the goodness of fit of the overall model (see table above) - were likewise negatively correlated. The presence of negative correlation in almost all the scenarios presented in the MMO-2 indicates that this instruments tends to lay out Justice orientation and Care orientation as opposing rather than complementing constructs. The protagonist of the vignettes are, in fact, very often faced with dilemmas where assuming a caring orientation goes against principles of justice and vice-versa.

**Table 3. Estimated Correlation Matrix for the Latent Variables for Model11**

| *Factor* | CARE2 | JUST2 | JUST3 | CARE3 | JUST5 | CARE5 | CARE7 | JUST7 |
|---|---|---|---|---|---|---|---|---|
| CARE2 | 1.000 | | | | | | | |
| JUST2 | **-.231** | 1.000 | | | | | | |
| JUST3 | .104 | .055 | 1.000 | | | | | |
| CARE3 | **.475** | **.558** | -.232 | 1.000 | | | | |
| JUST5 | -.012 | .126 | **.252** | -.081 | 1.000 | | | |
| CARE5 | **.417** | **.144** | .106 | **.456** | **-.540** | 1.000 | | |
| CARE7 | **.379** | .000 | .020 | **.443** | -.023 | **.267** | 1.000 | |
| JUST7 | -.087 | **.278** | **.265** | .278 | **.361** | .105 | .135 | 1.000 |

Note: Inter-factor correlations for Justice highlighted in blue, Inter-factor correlations for Care highlighted in yellow. Inter-factor correlations for Care-Justice highlighted in green. Inter-factor correlations with $p < .05$ in boldface

The presence of significant correlations, albeit low in number and value, suggests that we explore the possibility of two overarching factors, one for Care and for Justice.

Therefore, in the next pages, we will attempt to run a Second-order Confirmatory Factor Analysis.

### 6.3.3 *MMO-2 Construct Validity through First order and Second Order Confirmatory Factor Analysis*

Confirmatory Factor Analysis is a form of factor analysis whereby the researcher can verify how well a set number of measured variables represents the number of a-priory specified constructs (Kline, 2011). In that sense, CFA is characterized by a hypothesis-driven nature. As Brown (2006) points out: "*It is unlike its counterpart, exploratory factor analysis (EFA), in that the researcher must re-specify all aspects of the CFA model. Thus, the researcher must have a firm a priori sense, based on past evidence and theory, of the number of factors that exist in the data, of which indicators are related to which factors, and so forth*" (p. 1).

However, this is not totally true. As Joreskog (1974) pointed out: "*Many investigations are to some extent both exploratory and confirmatory, since they involve some variables of known and other variables of unknown composition*" (p. 2).

One of the advantages of using CFA rather than EFA is that the former allows the researcher to test for hierarchy between factors with second-order factor analysis being the most commonly used (Marsh & Hocevar, 1988). In this study, CFA will be employed to test whether the Justice and Care factors measured by the MMO-2 can be better understood as multidimensional or unidimensional. Therefore, the first step will involve a first-order Confirmatory Factor Analysis and subsequently we will try to specify the model through a second-order Confirmatory Factor Analysis.

#### 6.3.3.1 *MMO-2 First Order Confirmatory Factor Analysis*

Model1 includes the factors Justice2 and Care2. The model fit indices exhibits a poor goodness of fit, in particular with regard to the RMSEA and TLI: $\chi^2$ (58.832), Df = 13, p < .01, RMSEA = .084 (.063, .106), prob < .05 = .005, CFI = .956, TLI = .928, WRMR = .988. A look at the Modification Indices suggests to acknowledge the crossloading of item8 on Justice2. This choice would drop the $\chi^2$ by 39.050 and its correlation value would be of -.533. This is also consistent with the values provided by EFA for item8 on Justice2 (.276) and ESEM (-2.64). Once we let item8 load on Justice two, we obtain the following indices of model fit: $\chi^2$ (2.526), Df = 12, p > .05, RMSEA = .038 (.000, .065), prob < .05 = .746, CFI = .992, TLI = .986, WRMR = .573. The standardised factor loading for this item shows a close value (λ = -.316) to the one suggested by the Modification Indices. Given the high improvement that this crossloading provides to the goodness of fit of the overall model, we will acknowledge it for future analyses.

Model2 includes the factors Justice3 and Care3. The addition of these two factors, slightly decreases the goodness of fit of the overall model: $\chi^2$ (85.256), Df = 46, p < .01, RMSEA = .041 (.027, .055), prob < .05 = .848, CFI = .981, TLI = .973, WRMR = .781. However, these values are still within the cut-off points suggested by Hu and Bentler (1999). In addition to this, no Modification Indices is shown that would make a substantial difference in the goodness of fit of the overall model. Therefore, no modification will be taken.

Model3 includes the factors Justice5 and Care5. The addition of these two factors, leaves the goodness of fit of the overall model nearly unaltered: $\chi^2$ (178.173), Df = 101, p < .01, RMSEA = .039 (.029, .048), prob < .05 = .868, CFI = .980, TLI = .973, WRMR = .813. No Modification Indices above the value of 3.84 would significantly improve the model fit, therefore no further action on the model will be taken.

Model4 includes the factors Justice7 and Care7. The addition of these two factors results in a drastic drop in the goodness of fit of the overall model, especially with regard to the CFI, TLI, and WRMR: $\chi^2$ (384.414), Df = 198, p < .01, RMSEA = .043 (.037, .050), prob < .05 = .955, CFI = .966, TLI = .956, WRMR = .909. A look at the Modification Indices table suggests that item48 could be a candidate for crossloading on Justice2, and this would reduce the $\chi^2$ by 56.767. However, there is no theoretical evidence to support this choice, therefore we will not allow this item to load on another factor.

The $R^2$ ranges from a minimum of .239 for item4 to a maximum of .845 for item47.

#### 6.3.3.2 *MMO-2 Second Order Confirmatory Factor Analysis*

A second order factor analysis with the five Justice and Care factors was attempted to asses whether these separate constructs would account for two endogenous variables, which we could define as Justice and Care. We started with the range of factors from Justice2 to Justice7, which we have obtained from the previous first order factor analysis.

Model1 include Justice2, Justice3, Justice5, Justice6, and Justice7. The goodness of fit of the overall model is very poor and well below the cut-off points suggested by Hu and Bentler (1999):

$\chi^2$ (1275.360), Df = 409, p < .01, RMSEA = .065 (.061, .069), prob < .05 = .000, CFI = .921, TLI = .911, WRMR = 1.347. A look at the factor loadings shows very poor level of $\lambda$ for Justice3 (.034) and Justice5 (-.034), along with a Haywood case for Justice6 (1.095). Dropping these three factors, significantly improves the model fit indices: $\chi^2$ (765.981), Df = 391, p < .01, RMSEA = .044 (.039, .048), prob < .05 = .000, CFI = .966, TLI = .960, WRMR = .993.

However, these Justice2 and Justice7 contribute with very low $R^2$ (.164 and .265 respectably) to the factor Justice. In addition to this, Mplus warns against the latent variable covariance matrix (psi), which does not appear to be positive definite. This is due to a correlation higher than 1 between the factors Justice and Care3. On the basis of the above arguments, we should reject the hypothesis that there is an overarching Justice factor accounting for Justice2, Justice3, Justice5, Justice6, and Justice7.

Turning to the factor Care. The simultaneous presence of Care2, Care3, Care5, Care6, and Care7 does not allow the model to converge. No other solution will allow the model to converge, not even when the other factors are deleted.

Based on this evidence, we can conclude that it is not possible to apply a hierarchical solution to the MMO-2. Therefore this scale is better at explaining Justice and Care as two multidimensional correlated constructs.

### 6.3.4 MMO-2 Convergent and Discriminant validity

In order to assess the MMO-2 convergent validity, two subscales of the Moral Foundation Questionnaire, namely Harm/Care and Fairness/Reciprocity, have been employed. Building on the latest model specified with ESEM, the addition of these two new factors yields the following goodness of fit indices: $\chi^2$ (545.095), Df = 340, $p < .01$, RMSEA = .035 (.029, .040), prob < .05 = 1.000, CFI = .973, TLI = .965, WRMR = .820. Only modest correlation could be found between the factors Harm/Care and Care3 (.456), Care5 (.267) and Care7 (.176) as well as between Fairness/Reciprocity and Justice2 (.338), Justice5 (.135), Justice7 (.286). Care2 with Harm/Care and Justice3 with Fairness/Reciprocity showed a non-significant p value of .122 and .377 respectively.

Correlations between Justice and Factors range from a minimum of -.540 for Justice5 and Care5 to a maximum of .588 for Justice2 and Care3. The relatively not excessively high correlations between these factors suggests for discriminant validity.

## 6.4 Discussion

The analyses carried out in this study suggest the need for more revisions on the MMO-2 before it reaches a satisfactory psychometric validity. In particular, the combined use of EFA and ESEM for this research suggested dropping 3 vignettes that would otherwise significantly impair the goodness of fit of the model. In addition to this, the use of CFA showed that the Care and Justice factors analyzed by the MMO-2 are best understood as multidimensional construct, with 8 factors, 4 for Justice and 4 for Care respectively. Therefore, a ‘slimmer’ version of the MMO-2, with 8 intercorrelated factors seems to be the best solution for the MMO-2 (see full model in appendix E).

Nonetheless, further revisions are still suggested to strengthen some of the items – and the factors explaining them – of the MMO-2. This is confirmed, in particular, by the low values found for the convergent validity between the MMO-2 Care and Justice factors and the MFQ Harm/Care and Fairness/Reciprocity.

In addition to this, the MMO-2 presents a number of items crossloading on other factors, which the author should take into consideration when revising this instrument.

## 6.5 Conclusions

This work constituted an opportunity to assess the psychometric validity of the Measure of Moral Orientation second revision (MMO-2) while adapting it to the Italian context. Since there is no similar instrument available in this country, the study presented here can be of great use for researchers and practitioners in the ethics and moral domain who are interested in the quantitative analyses of these phenomena.

However, as the analyses carried out in this study have shown, that there is still some space for improvement for the MMO-2 before it can be used. In particular, I propose in this work to reduce the number of vignettes and address the issues of items crossloadings and convergent validity. These actions would favour the psychometric validity of this instrument.

The need for more accurate instruments is paramount considering that the meta-analytic literature on moral reasoning does not seems to have reached an agreement between those who found small sex differences in moral reasoning, with care favouring very little women and justice favouring males (Jaffee & Hyde, 2000; Walker, 1984) and those who contested these findings (Baumrind, 1986).

With more adequate tools we would be better equipped to give an answer to this debate. Although we agree with authors like Maryling Friedmann (1995) who argues that statistically significant gender differences should not be the core of the justice and care discourse, appropriate measurements could shed more light on our understanding of how justice and care are differentiated.

This study has attempted to add more knowledge on the use of quantitative instruments for measuring moral orientation. Our ultimate goal is to offer better and more reliable tools for tapping into people's moral concerns whereby advancing the scientific understanding of these issue.

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**Appendix A: Italian translation of the Measure of Moral Orientation (MMO-2)**

## Istruzioni per la compilazione del questionario

Leggi le seguenti situazioni e prova ad assumere il ruolo della persona che si trova ad affrontare ciascun dilemma. Valuta le affermazioni riportate dopo ogni scenetta sulla base di quanto ti senti ‘fortemente d’accordo’, ‘abbastanza d’accordo’, ‘abbastanza in disaccordo’, o ‘fortemente in disaccordo’.

Scrivi il numero corrispondente alla tua valutazione nella casella accanto ad ogni affermazione. Ricorda che non ci sono risposte giuste o sbagliate e che le tue risposte potranno aiutarci a capire meglio come le persone reagiscono di fronte a situazioni difficili. Le tue risposte saranno, inoltre, ritenute strettamente confidenziali.

Leggi ogni affermazione con calma, ma non prendere troppo tempo a valutare la tua risposta, di solito la prima reazione è anche la più accurata.

**Università di Napoli Federico II**
**Dipartimento di Studi Umanistici**

## Il CLUB DEGLI STUDENTI

È periodo di iscrizioni al club degli studenti. Tutti i nuovi membri devono ottenere il 90% dei voti da parte dei soci per iscriversi. Io sono membro dall'anno scorso e molti mi considerano come un/a buon/a candidato/a per la leadership del club.
Il/la mio/a coinquilino/a vuole iscriversi al club. Dopo il party di benvenuto, dove i soci incontrano coloro che vogliono iscriversi, ho sentito alcuni membri anziani deridere il/la mio/a coinquilino/a.

| Fortemente in disaccordo | Abbastanza in disaccordo | Abbastanza d'accordo | Fortemente d'accordo |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

| | | |
|---|---|---|
| **1.** | Non voglio far nulla che possa mettere a rischio la mia amicizia con il/la mio/a coinquilino/a. | ☐ |
| **2.** | I membri del club hanno il diritto di pensarla come vogliono riguardo ai potenziali nuovi iscritti. | ☐ |
| **3.** | Non voglio far nulla che possa influenzare il processo di selezione dei nuovi membri. | ☐ |
| **4.** | La cosa fondamentale è che il/la mio/a coinquilino/a non ci resti male a causa dell'accaduto. | ☐ |
| **5.** | Dovrei provare ad essere oggettivo/a riguardo a questa situazione. | ☐ |
| **6.** | Mi sento combattuto/a, perché ci tengo ai/alle miei/mie amici/che di club, però voglio bene anche al/la mio/a coinquilino/a. | ☐ |

## IL PLAGIO

Collaboro per il giornale degli studenti ed ho lavorato sodo per varie settimane a una serie di articoli su violenza e media, i quali dovrebbero essere pubblicati tra due settimane. Stamattina ho visto la tesi del/la mio/a coinquilino/a sul tavolo della cucina; da un'occhiata veloce al testo, ho riconosciuto alcuni passaggi e, a quel punto, mi sono reso/a conto che il mio coinquilino ha ricopiato parola per parola una considerevole parte del mio articolo. Se i miei articoli saranno pubblicati, il suo plagio sarà scoperto e la sua possibilità di laurearsi compromessa.

| **Fortemente in disaccordo** | **Abbastanza in disaccordo** | **Abbastanza d'accordo** | **Fortemente d'accordo** |
|---|---|---|---|
| **1** | **2** | **3** | **4** |

| | | |
|---|---|---|
| **7.** | Ci sono rimasto male per ciò che il/la mio/a coinquilino/a ha fatto, però non voglio che finisca nei guai. | ☐ |
| **8.** | Al di là delle conseguenze per il/la mio/a coinquilino/a, l'articolo è mio e ho il diritto di farmelo pubblicare. | ☐ |
| **9.** | Dovrei essere oggettivo/a e razionale rispetto a questa situazione e non lasciare che la mia amicizia influenzi il mio giudizio. | ☐ |
| **10.** | So bene quanto la laurea sia importante, per cui non voglio fare qualcosa che possa poi impedire al/la mio/a coinquilino/a di laurearsi. | ☐ |
| **11.** | Non voglio far nulla che possa compromettere la mia amicizia con il/la mio/a coinquilino/a. | ☐ |
| **12.** | Il/La mio/a coinquilino/a ha il dovere di risolvere la faccenda. | ☐ |
| **13.** | Vorrei trovare una soluzione che danneggi il meno possibile sia me, sia il/la mio/a coinquilino/a. | ☐ |
| **14.** | A prescindere dalle ragioni che lo/la hanno spinto/a a fare ciò che ha fatto, il/la mio/a coinquilino/a ha infranto le regole. | ☐ |
| **15.** | Ho timore di danneggiare la mia amicizia con il/la mio/a coinquilino/a. | ☐ |

## ANDREA

Sono sposato/a con Andrea da due anni. Entrambi siamo iscritti all'università e non abbiamo bambini. Tre mesi fa ad Andrea è stato diagnosticato un cancro e i medici gli/le hanno consigliato di sottoporsi a dei cicli di chemioterapia intensiva. Andrea mi ha chiesto di non dire nulla ai suoi genitori riguardo al cancro perché teme che si intrometterebbero nel corso della terapia e pretenderebbero che lui/lei si ritrasferisse a casa loro. Io gli/le ho promesso che non avrei detto nulla, però la chemio gli/le sta comportando una serie di sbalzi d'umore, i quali sono parecchio difficili da gestire. I suoi genitori sono perplessi a causa di questi atteggiamenti nel/la figlio/a e ne attribuiscono la causa al nostro matrimonio, che non hanno mai del tutto accettato.

| Fortemente in disaccordo | Abbastanza in disaccordo | Abbastanza d'accordo | Fortemente d'accordo |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

**16.** Questa è una situazione di diritti contrastanti: i genitori di Andrea hanno il diritto di sapere e allo stesso tempo Andrea ha il diritto di non dirglielo. ☐

**17.** Ho fatto una promessa e, accada quel che accada, non posso romperla. ☐

**18.** Non vorrei ferire i sentimenti di Andrea, però non possiamo nemmeno continuare ad ignorare quelli dei suoi genitori, anche loro ne stanno risentendo di questa situazione. ☐

**19.** Ciò che Andrea vuole è quello che conta di più ed io ho il dovere di rispettare la sua decisione. ☐

**20.** La questione centrale sta nel trovare un compromesso che non faccia soffrire né Andrea né i suoi genitori. ☐

**21.** Mi preme mantenere buoni rapporti con i genitori di Andrea. ☐

**22.** Ora come ora, abbiamo bisogno l'uno dell'altro; nessuno di noi dovrebbe affrontare questa cosa da solo/a. ☐

## KATIA

Io e la mia amica Katia abbiamo frequentato lo stesso corso, il quale è propedeutico e si può sostenere solo per quest'anno. Katia è stata bocciata alla prova precorso, ma nonostante ciò è riuscita ad ottenere il massimo dei voti all'esame, mentre io, pur avendo studiato sodo, ho preso un voto inferiore. Ieri sera Katia mi ha rivelato in confidenza che il professore ha sviluppato un certo 'interesse' verso di lei e che le aveva offerto di passare la notte con lui in cambio del massimo dei voti all'esame.

| Fortemente in disaccordo | Abbastanza in disaccordo | Abbastanza d'accordo | Fortemente d'accordo |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

**23.** Ho il dovere di fare ciò che è giusto. ☐

**24.** La mia preoccupazione principale è lo stato d'animo di Katia. ☐

**25.** Katia ha il diritto di fare quello che le pare. ☐

**26.** La cosa fondamentale è che Katia non soffra. ☐

**27.** Questo è un caso evidente di violazione della condotta e bisogna fare qualcosa. ☐

**28.** Stando le cose, la reputazione di Katia rispetto ai suoi/sue compagni/e di corso e con i/le docenti è fortemente a rischio. ☐

**29.** Questa è una faccenda di diritti contrastanti: da una parte il diritto di Katia e del professore di fare quello che vogliono, e dall'altra il diritto degli studenti del corso di non subire discriminazioni. ☐

**30.** Non voglio far nulla che possa compromettere la mia amicizia con Katia. ☐

## IL RESPONSABILE

Essendo il direttore del giornale dell'università, sono io a decidere quali storie devono essere pubblicate. Uno dei nostri reporter ha appena consegnato un pezzo su un responsabile dell'università che ha attinto alle tasse universitarie per suoi fini privati. Leggo l'articolo e concludo che è accurato.
Ho chiamato a casa del responsabile per parlare con lui della faccenda e dirgli che la renderemo di dominio pubblico. Al telefono però ha risposto la moglie, la quale mi ha informato che suo marito è all'ospedale con il loro figlio, malato terminale. La scadenza per pubblicare l'articolo è mezzanotte di oggi.

| Fortemente in disaccordo | Abbastanza in disaccordo | Abbastanza d'accordo | Fortemente d'accordo |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

**31.** Dovrei fare ciò che è giusto, a prescindere dalle conseguenze. ☐

**32.** Anche se ha sbagliato, probabilmente l'ha fatto nell'interesse di suo figlio. ☐

**33.** Al di là delle possibili conseguenze, sono preoccupato/a per i princìpi in gioco in questa faccenda. ☐

**34.** Nonostante ciò che abbiamo scoperto, non voglio sentirmi responsabile per aver arrecato danno a lui e alle sua famiglia. ☐

**35.** Dovrei evitare di pubblicare il pezzo, parlare con il responsabile e chiedergli di sistemare la faccenda in maniera discreta, così da non far torto a nessuno. ☐

**36.** Dovrei trattare il responsabile come tutti gli altri, senza considerare le sue circostanze personali. ☐

## RICCARDO

Mio fratello Riccardo si frequenta con Amanda da due anni e a volte hanno parlato di sposarsi dopo aver finito l'università. Tutti e tre andiamo alla stessa università, per cui ci vediamo di frequente. Stamattina, sul presto, ho visto Amanda baciarsi con il mio vicino di casa, Michele, mentre usciva dal suo appartamento. È ovvio che abbia passato la notte da lui.

| Fortemente in disaccordo | Abbastanza in disaccordo | Abbastanza d'accordo | Fortemente d'accordo |
|---|---|---|---|
| 1 | 2 | 3 | 4 |

**37.** La cosa fondamentale per me è che mio fratello Riccardo non soffra. ☐

**38.** Non voglio essere quello/a che compromette la relazione tra Riccardo e Amanda. ☐

**39.** Dovrei dirlo a Riccardo, perché se mi trovassi nella stessa situazione vorrei che lui me lo dicesse. ☐

**40.** La mia decisione dipende da cosa veramente Riccardo prova nei confronti di Amanda. ☐

**41.** Amanda ha mancato nei confronti della relazione con Riccardo, e lui dovrebbe saperlo. ☐

**42.** Non voglio essere quello/a che darà a Riccardo una notizia che lo farà soffrire. ☐

**43.** Devo fare quello che è giusto fare, a prescindere dalle conseguenze. ☐

**44.** Riccardo ha il diritto di sapere che Amanda lo sta tradendo. ☐

## I GENITORI

I miei genitori, dopo 30 anni di matrimonio alquanto burrascoso, stanno divorziando. Mia madre ha intrattenuto una relazione con un altro uomo da alcuni anni e ora ha deciso di mettere fine al suo matrimonio e sembra convinta della sua decisione.
Ognuno dei miei genitori vuole che io passi le vacanze di fine semestre a casa sua. Il fatto è che mio padre ci resterà malissimo se vado a casa di mia madre, perché lì ci sarà anche il suo 'amico'.

| **Fortemente in disaccordo** | **Abbastanza in disaccordo** | **Abbastanza d'accordo** | **Fortemente d'accordo** |
|---|---|---|---|
| **1** | **2** | **3** | **4** |

**45.** Ho il diritto di passare il mio tempo con chi mi pare.

**46.** Date le circostanze, mi sento in obbligo nei confronti di entrambi i miei genitori.

**47.** Ciò che vorrei di più è di accontentare tutti e non farli soffrire.

**48.** Non voglio che nulla si intrometta tra me e i miei genitori.

**49.** La mia decisione dipende da quanto ognuno dei miei genitori ha bisogno di me in questo momento.

**50.** Ognuno ha il diritto ad essere felice, anche se a volte le conseguenze delle nostre azioni possono ferire gli altri.

**51.** Nonostante ciò che mia madre ha fatto, non farei nulla per farla soffrire.

**52.** Mi comporterò in maniera oggettiva, dividendo a metà il mio tempo tra entrambi i miei genitori.

**Informazioni personali:**

Età: ________

Genere con il quale ti identifichi: _______________

Etnia o razza con la quale ti identifichi: ______________________________

Anno accademico:

_____ primo anno (Laurea di base)

_____ secondo anno (Laura di base)

_____ terzo anno (Laura di base)

_____ specifica anno fuori corso (Laurea di base)

_____ primo anno (Laurea Magistrale)

_____ secondo anno (Laurea Magistrale)

_____ specifica anno fuori corso (Laurea Magistrale)

Corso di Studi: __________________________________________

Ai sensi del D.lgs 196/2003 desideriamo informarla che, ai fini della ricerca che stiamo conducendo, sarà necessario operare il trattamento dei dati personali e dei dati sensibili che saranno raccolti: il trattamento sarà finalizzato unicamente allo svolgimento dell'attività di ricerca e sarà svolto in conformità con le procedure scientifiche di trattamento dei dati; il conferimento dei dati è facoltativo, ma necessario per la partecipazione alla ricerca; i dati saranno trattati nel rispetto dei principi della correttezza, liceità e trasparenza dettati dal suddetto decreto. Il titolare del trattamento è l'Università degli Studi di Napoli Federico II; il responsabile scientifico della ricerca è la Prof.ssa Caterina Arcidiacono e il dottor Di Martino Salvatore.
La ringraziamo di avere collaborato alla ricerca.

Con la mia firma autorizzo il trattamento dei miei dati personali.

Firma

__________________________________________________________

## Appendix B: Factor Loadings for Exploratory factor Analysis with oblimin rotation

| Items | Original items | Translated Items | Care | Justice | Residual Variance |
|---|---|---|---|---|---|
| **Item 1** | I don't want to do anything that would jeopardize my relationship with my roommate. | Non voglio far nulla che possa mettere a rischio la mia amicizia con il/la mio/a coinquilino/a. | **.414*** | .211* | .760 |
| **Item 2** | The members are entitled to their opinions of all prospective members. | I membri del club hanno il diritto di pensarla come vogliono riguardo ai potenziali nuovi iscritti. | .011 | **.722*** | .477 |
| **Item 3** | I don't want to do anything to influence the process of membership selection. | Non voglio far nulla che possa influenzare il processo di selezione dei nuovi membri. | -.098 | **.407*** | .835 |
| **Item 4** | The most important thing is my roommate not be hurt by what happens. | La cosa fondamentale è che il/la mio/a coinquilino/a non ci resti male a causa dell'accaduto. | **.685*** | -.035 | .536 |
| **Item 5** | I should try to be objective about this situation. | Dovrei provare ad essere oggettivo/a riguardo a questa situazione. | -.235* | **.326*** | .847 |
| **Item 6** | I feel conflicted because I care about my friends, but I also care about my roommate. | Mi sento combattuto/a, perché ci tengo ai/alle miei/mie amici/che di club, però voglio bene anche al/la mio/a coinquilino/a. | **.440*** | -.023 | .809 |
| **Item 7** | I am hurt that my roommate did this, but I don't want to make it bad for him/her. | Ci sono rimasto male per ciò che il/la mio/a coinquilino/a ha fatto, però non voglio che finisca nei guai. | **.604*** | -.043 | .622 |

| | | | | | |
|---|---|---|---|---|---|
| **Item 8** | Regardless of the consequences to my roommate, the article was mine and I have a right to have it published. | Al di là delle conseguenze per il/la mio/a coinquilino/a, l'articolo è mio e ho il diritto di farmelo pubblicare. | -.276* | **.581*** | .519 |
| **Item 9** | I should be objective and rational about this, and not let my relationship cloud my judgment. | Dovrei essere oggettivo/a e razionale rispetto a questa situazione e non | -.161* | **.262*** | .887 |
| **Item 10** | I know how important graduation is and I don't want to do anything that will keep my roommate from graduating. | So bene quanto la laurea sia importante, per cui non voglio fare qualcosa che possa poi impedire al/la mio/a coinquilino/a di laurearsi. | **.620*** | -.063 | .595 |
| **Item 11** | I would not do anything to harm my friendship with my roommate. | Non voglio far nulla che possa compromettere la mia amicizia con il/la mio/a coinquilino/a. | **.715*** | -.037 | .476 |
| **Item 12** | My roommate has an obligation to make this right. | Il/La mio/a coinquilino/a ha il dovere di risolvere la faccenda. | .112* | **.751*** | .460 |
| **Item 13** | I would seek a solution that would do the least harm to both of us. | Vorrei trovare una soluzione che danneggi il meno possibile sia me, sia il/la mio/a coinquilino/a. | **.632*** | .110* | .618 |
| **Item 14** | Regardless of the reasons for doing so, my roommate violated principles. | A prescindere dalle ragioni che lo/la hanno spinto/a a fare ciò che ha fatto, il/la mio/a coinquilino/a ha infranto le regole. | -.003 | **.609*** | .628 |
| **Item 15** | I am worried about hurting my friendship with my roommate. | Ho timore di danneggiare la mia amicizia con il/la mio/a coinquilino/a. | **.561*** | .074 | .698 |
| **Item 16** | This is a matter of conflicting rights: Morgan's parents have a right to know, but Morgan also has a right not to tell them. | Questa è una situazione di diritti contrastanti: i genitori di Andrea hanno il diritto di sapere e allo stesso tempo Andrea ha il diritto di non dirglielo. | **.327*** | .291* | .851 |

| | | | | | |
|---|---|---|---|---|---|
| **Item 17** | I made a promise and I should not break that promise no matter what. | Ho fatto una promessa e, accada quel che accada, non posso romperla. | .028 | **.819*** | .340 |
| **Item 18** | I don't want to hurt Morgan but we can't continue to overlook Morgan's parents' feelings; they feel hurt, too. | Non vorrei ferire i sentimenti di Andrea, però non possiamo nemmeno continuare ad ignorare quelli dei suoi genitori, anche loro ne stanno risentendo di questa situazione. | **.490*** | -.393* | .510 |
| **Item19** | Morgan's needs are the most important and I have a duty to respect those wishes. | Ciò che Andrea vuole è quello che conta di più ed io ho il dovere di rispettare la sua decisione. | .002 | **.774*** | .401 |
| **Item 20** | The primary issue would be to look for a compromise position which would keep both Morgan and Morgan's parents from feeling hurt. | La questione centrale sta nel trovare un compromesso che non faccia soffrire né Andrea né i suoi genitori. | **.578*** | -.001 | .666 |
| **Item 21** | I am concerned about maintaining my relationship with Morgan's parents. | Mi preme mantenere buoni rapporti con i genitori di Andrea. | **.462*** | .078 | .798 |
| **Item 22** | We all need each other right now; no one should go through this alone. | Ora come ora, abbiamo bisogno l'uno dell'altro; nessuno di noi dovrebbe affrontare questa cosa da solo/a. | **.560*** | .154* | .705 |
| **Item 23** | I have a duty to do the right thing. | Ho il dovere di fare ciò che è giusto. | .021 | **.635*** | .601 |
| **Item 24** | My primary concern is Karen's state of mind. | La mia preoccupazione principale è lo stato d'animo di Katia. | **.749*** | .057 | .453 |
| **Item 25** | Karen has a right to her own business. | Katia ha il diritto di fare quello che le pare. | .197* | **-.412*** | .758 |
| **Item 26** | The most important thing is that Karen not get hurt. | La cosa fondamentale è che Katia non soffra. | **.970*** | .002 | .059 |
| **Item 27** | This is clearly a violation of the rules and should be addressed. | Questo è un caso evidente di violazione della condotta e bisogna fare qualcosa. | .017 | **.788*** | .384 |

| | | | | | |
|---|---|---|---|---|---|
| **Item 28** | Karen's reputation with her classmates and faculty is in jeopardy here. | Stando le cose, la reputazione di Katia rispetto ai suoi/sue compagni/e di corso e con i/le docenti è fortemente a rischio. | -.029 | **.390*** | .842 |
| **Item 29** | This is really about conflicting rights: Karen and the professor's right to do what they want, and the rights of the other students in the class to not be disadvantaged. | Questa è una faccenda di diritti contrastanti: da una parte il diritto di Katia e del professore di fare quello che vogliono, e dall'altra il diritto degli studenti del corso di non subire discriminazioni. | **.257*** | .000 | .934 |
| **Item 30** | I don't want to do anything to jeopardize my relationship with Karen. | Non voglio far nulla che possa compromettere la mia amicizia con Katia. | **.566*** | -.140* | .628 |
| **Item 31** | I would do what I thought was fair, regardless of the consequences to myself or others. | Dovrei fare ciò che è giusto, a prescindere dalle conseguenze. | .046* | **.836*** | .345 |
| **Item 32** | Whatever he did, he probably did so with his child in mind. | Anche se ha sbagliato, probabilmente l'ha fatto nell'interesse di suo figlio. | **.647*** | .121* | .659 |
| **Item 33** | Regardless of the consequences, I am concerned about the principles involved. | Al di là delle possibili conseguenze, sono preoccupato/a per i princìpi in gioco in questa faccenda. | .237* | **.217*** | .955 |
| **Item 34** | In spite of what we know, I would not want to be responsible for causing harm to him and his family. | Nonostante ciò che abbiamo scoperto, non voglio sentirmi responsabile per aver arrecato danno a lui e alle sua famiglia. | **.710*** | .001 | .496 |
| **Item 35** | In order to hurt the least number of people, I should drop the story, tell the administrator what I know, and ask him to correct it quietly. | Dovrei evitare di pubblicare il pezzo, parlare con il responsabile e chiedergli di sistemare la faccenda in maniera discreta, così da non far torto a nessuno. | **.618*** | -.220* | .411 |
| **Item 36** | I would treat the administrator like everyone else, regardless of his personal circumstances. | Dovrei trattare il responsabile come tutti gli altri, senza considerare le sue circostanze personali. | -.155 | **.650*** | .435 |

| | | | | | |
|---|---|---|---|---|---|
| **Item 37** | The most important thing to me is that my brother Richard not get hurt. | La cosa fondamentale per me è che mio fratello Riccardo non soffra. | .380* | **.515*** | .846 |
| **Item 38** | I do not want to be the one to cause harm to Richard's relationship with Amy. | Non voglio essere quello/a che compromette la relazione tra Riccardo e Amanda. | **.661*** | -.233* | .309 |
| **Item 39** | I would tell Richard because if I were in his situation I would want him to tell me. | Dovrei dirlo a Riccardo, perché se mi trovassi nella stessa situazione vorrei che lui me lo dicesse. | -.169* | **.682*** | .356 |
| **Item 40** | My reaction would depend upon how Richard really feels about Amy. | La mia decisione dipende da cosa veramente Riccardo prova nei confronti di Amanda. | **.353*** | -.210* | .735 |
| **Item 41** | Amy violated the rules of their relationship and Richard should know. | Amanda ha mancato nei confronti della relazione con Riccardo, e lui dovrebbe saperlo. | -.063 | **.834*** | .231 |
| **Item 42** | I don't want to be the one to hurt Richard with the news. | Non voglio essere quello/a che darà a Riccardo una notizia che lo farà soffrire. | **.804*** | -.018 | .334 |
| **Item 43** | I would do what I thought was fair, regardless of the consequences. | Devo fare quello che è giusto fare, a prescindere dalle conseguenze. | -.232* | **.611*** | .389 |
| **Item 44** | Richard has a right to know that Amy is cheating. | Riccardo ha il diritto di sapere che Amanda lo sta tradendo. | .044 | **.919*** | .206 |
| **Item 45** | I have the right to spend time with whomever I want. | Ho il diritto di passare il mio tempo con chi mi pare. | -.150* | **.602*** | .639 |
| **Item 46** | I have an obligation to both my parents right now. | Date le circostanze, mi sento in obbligo nei confronti di entrambi i miei genitori. | **.720*** | -.023 | .486 |
| **Item 47** | What I wish more than anything is to make everyone happy and not hurt them. | Ciò che vorrei di più è di accontentare tutti e non farli soffrire. | **.955*** | -.039 | .096 |
| **Item 48** | I don't want anything to come between my parents and me. | Non voglio che nulla si intrometta tra me e i miei genitori. | **.443*** | .199* | .740 |

| | | | | | |
|---|---|---|---|---|---|
| **Item 49** | What I did would depend on how I thought each parent needed me. | La mia decisione dipende da quanto ognuno dei miei genitori ha bisogno di me in questo momento. | .100 | .067 | .982 |
| **Item 50** | Everyone has the right to happiness, even if the consequences are sometimes hurtful to others. | Ognuno ha il diritto ad essere felice, anche se a volte le conseguenze delle nostre azioni possono ferire gli altri. | .147 | **.593*** | .604 |
| **Item 51** | In spite of what my mother did, I would not do anything to hurt her. | Nonostante ciò che mia madre ha fatto, non farei nulla per farla soffrire. | .529* | .556* | .556 |
| **Item 52** | I will do the objective thing – split my time between both of them. | Mi comporterò in maniera oggettiva, dividendo a metà il mio tempo tra entrambi i miei genitori. | **.541*** | .187* | .645 |

* *p* value significant at 5% level.

**Goodness of fit model parameters for Exploratory Factor Analysis with oblimin oration**

| Factors | Items | Chi-Square Test of Model Fit | RMSEA | CFI | TLI | SRMR |
|---|---|---|---|---|---|---|
| **Care1 & Justice1** | item1 item2 item3 item4 item6 | Value = .671 Df = 1 P-Value = .4129 | Estimate = .000 90 Percent C.I. = .000 .110 Prob. p <= .05 = .644 | 1.000 | 1.023 | .008 |
| **Care2 & Justice2** | item7-item15 | Value = 48.623 Df = 19 P-Value = .0002 | Estimate = .056 90 Percent C.I. = .037 .075 Prob. p <= .05 = .287 | .980 | .961 | .033 |
| **Care3 & Justice3** | item17-item22 | Value = 8.722 Df = 4 P-Value = .0684 | Estimate = .049 90 Percent C.I. = .000 .093 Prob. p <= .05 = .452 | .995 | .981 | .025 |
| **Care4 & Justice4** | item23 item24 item25 item26 item27 item28 item30 | Value = 3.130 Df = 8 P-Value = .0002 | Estimate = .074 90 Percent C.I. = .047 .103 Prob. p <= .05 = .068 | .988 | .034 | .034 |
| **Care5 & Justice6** | item31 item32 item34 item35 item36 | Value = 1.674 Df = 1 P-Value = .1958 | Estimate = .037 90 Percent C.I. = .000 .131 Prob. p <= .05 = .439 | 1.000 | .995 | .008 |
| **Care6 & Justice6** | item37-item44 | Value = 9.377 Df = 13 P-Value = .7439 | Estimate = .000 90 Percent C.I. = .000 .032 Prob. p <= .05 = .996 | 1.000 | 1.002 | .015 |
| **Care7 & Justice7** | item45 item46 item47 item48 item50 item52 | Value = 8.920 Df = 4 P-Value = .0631 | Estimate = .050 90 Percent C.I. = .000 .094 Prob. p <= .05 = .437 | .996 | .984 | .020 |

## Appendix C: Model goodness of fit parameters for Exploratory Structural Equation Modeling with geomin rotation

| Factors | Description | Chi-Square Test of Model Fit ($\chi^2$) | RMSEA | CFI | TLI | WRMR |
|---|---|---|---|---|---|---|
| **Model 1** | Justice1 & Care1 added | Value = .671<br>Df = 1<br>P-Value = .4129 | Estimate = .000<br>90 Percent C.I. = .000 .110<br>Prob. p <= .05 = .644 | 1.000 | 1.023 | .119 |
| **Model2** | Justice2 & Care2 included; Justice1 & Care1 deleted. | Value = 48.623<br>Df = 19<br>P-Value = .0002 | Estimate = .056<br>90 Percent C.I. = .037 .075<br>Prob. p <= .05 = .287 | .980 | .961 | .636 |
| **Model3** | Justice3 & Care3 included. Item9 deleted | Value = 14.260<br>Df = 61<br>P-Value = .0000 | Estimate = .051<br>90 Percent C.I. = .040 .062<br>Prob. p <= .05 = .428 | .970 | .956 | .816 |
| **Model4** | Justice4 & Care4 included. Item25 deleted. | Value = 371.918<br>Df = 141<br>P-Value = .0000 | Estimate = .057<br>90 Percent C.I. = .050 .064<br>Prob. p <= .05 = .047 | .954 | .938 | .977 |
| **Model5** | Justice5 & Care5 included | Value = 522.411<br>Df = 230<br>P-Value = .0000 | Estimate = .050<br>90 Percent C.I. = .045 .056<br>Prob. p <= .05 = .448 | .958 | .945 | .944 |
| **Model6** | Justice6 & Care6 included | Value = 892.502<br>Df = 427<br>P-Value = .0000 | Estimate = .047<br>90 Percent C.I. = .042 .051<br>Prob. p <= .05 = .899 | .963 | .954 | .961 |
| **Model7** | Justice7 & Care7 included | Value = 1119.012<br>Df = 609<br>P-Value = .0000 | Estimate = .041<br>90 Percent C.I. = .037 .045<br>Prob. p <= .05 = 1.000 | .965 | .958 | .923 |
| **Model8** | Justice4 & Care4 deleted | Value = 721.030<br>Df = 427<br>P-Value = .0000 | Estimate = .037<br>90 Percent C.I. = .032 .042<br>Prob. p <= .05 = 1.000 | .975 | .969 | .866 |
| **Model9** | item21 deleted | Value = 623.516<br>Df = 397<br>P-Value = .0000 | Estimate = .034<br>90 Percent C.I. = .029 .039<br>Prob. p <= .05 = 1.000 | .980 | .976 | .822 |
| **Model 10** | Justice6 & Care6 deleted | Value = 361.240<br>Df = 208<br>P-Value = .0000 | Estimate = .038<br>90 Percent C.I. = .032 .045<br>Prob. p <= .05 = .999 | .974 | .966 | .814 |

## Factor Loadings for Exploratory Structural Equation Modeling with geomin rotation

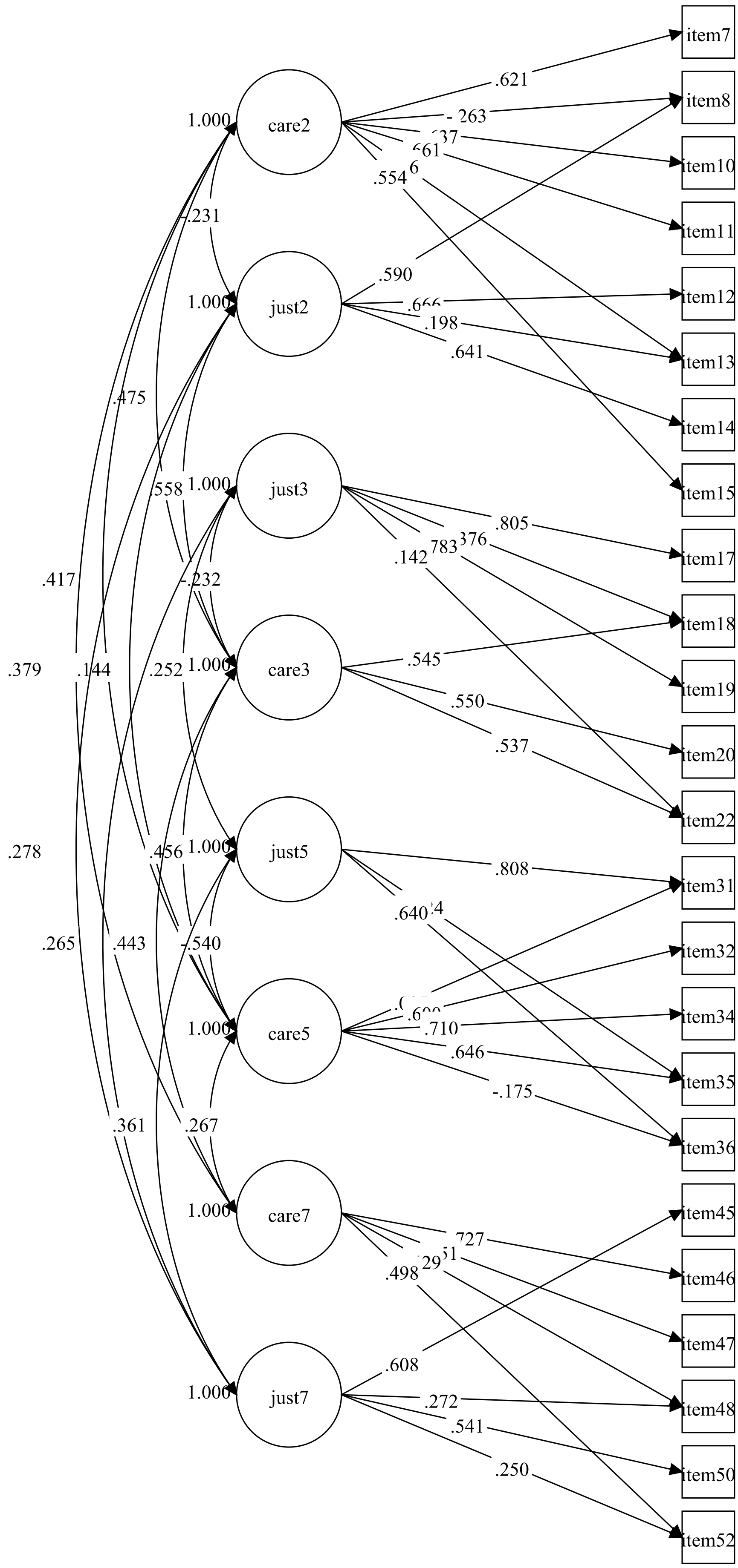
| Items | Factor Loadings (λ) Care2 | Factor Loadings (λ) Justice2 | R-square ($R^2$) |
|---|---|---|---|
| ITEM7 | **.621** | .000 | **.386** |
| ITEM8 | **-.263** | **.590** | **.489** |
| ITEM10 | **.637** | -.076 | **.435** |
| ITEM11 | **.661** | -.088 | **.472** |
| ITEM12 | .095 | **.666** | **.423** |
| ITEM13 | **.686** | .198 | **.447** |
| ITEM14 | -.007 | **.641** | **.413** |
| ITEM15 | **.554** | .070 | **.294** |
| **Items** | **Factor Loadings (λ) Care3** | **Factor Loadings (λ) Justice3** | **R-square ($R^2$)** |
| ITEM17 | -.001 | **.805** | **.648** |
| ITEM18 | **.545** | **-.376** | **.533** |
| ITEM19 | .002 | **.783** | **.613** |
| ITEM20 | **.550** | -.002 | **.303** |

| Items | Factor Loadings (λ) Care5 | Factor Loadings (λ) Justice5 | R-square ($R^2$) |
|---|---|---|---|
| ITEM22 | **.537** | .142 | **.273** |
| ITEM31 | .005 | **.808** | **.649** |
| ITEM32 | **.600** | .088 | **.311** |
| ITEM34 | **.710** | -.002 | **.506** |
| ITEM35 | **.646** | -.224 | **.624** |
| ITEM36 | -.175 | **.640** | **.561** |
| **Items** | **Factor Loadings (λ) Care7** | **Factor Loadings (λ) Justice7** | **R-square ($R^2$)** |
| ITEM45 | -.181 | **.608** | **.372** |
| ITEM46 | **.727** | .009 | **.531** |
| ITEM47 | **.951** | -.012 | **.901** |
| ITEM48 | **.429** | **.272** | **.290** |
| ITEM50 | .132 | **.541** | **.329** |
| ITEM52 | **.498** | **.250** | **.345** |

## Appendix D: Model goodness of fit parameters for first Order Confirmatory Factor Analysis with 4 Factors

| Factors | Description | Chi-Square Test of Model Fit ($\chi^2$) | RMSEA | CFI | TLI | WRMR |
|---|---|---|---|---|---|---|
| **Model 1** | Justice2 & Care2 added. Crossloading of Item8 on Justice2 specified | Value = 2.526 Df = 12 P-Value = .0578 | Estimate = .038 90 Percent C.I. = .000 .065 Prob. p <= .05 = .746 | .992 | .986 | .573 |
| **Model 2** | Justice3 & Care3 added | Value = 85.256 Df = 46 P-Value = .0004 | Estimate = .041 90 Percent C.I. = .027 .055 Prob. p <= .05 = .848 | .981 | .973 | .781 |
| **Model 3** | Justice5 & Care5 added | Value = 178.173 Df = 101 P-Value = .0004 | Estimate = .039 90 Percent C.I. = .029 .048 Prob. p <= .05 = .975 | .980 | .973 | .813 |
| **Model 4** | Just7 & Care7 added | Value = 384.414 Df = 198 P-Value = .0000 | Estimate = .043 90 Percent C.I. = .037 .050 Prob. p <= .05 = .955 | .966 | .956 | .909 |

# Appendix E: Diagram of MMO-2 Factor Structure



# Conclusions

The literature on happiness and well-being has focused on many important elements accounting for the good life. Indeed, over the years, a number of disciplines have consistently contributed to advancing our understanding of what make people feel good and happy with their life. However, the mainstream literature has also offered a vision of happiness and well-being that is either the result of individual efforts or the outcome of good governmental practices (Arcidiacono & Di Martino, 2016). This work has drawn on the contributions of contemporary feminism to challenge this vision and propose alternative ways to define and promote happiness and well-being.

Two scholarships have been surveyed in particular, that is the Feminist Economics and the Ethics of Care. What these disciplines have in common is their convergence in questioning the contemporary society and the way it has shaped people's perception and behaviours with regard to the good life. Specifically, the analysis of the two scholarships has yielded the followings three key elements, which I argue they have been extensively overlooked by the mainstream literature.

First the current approached have failed to frame life satisfaction and well-being within a contextual perspective that takes into account different levels of analysis. In other words, the pursuit of the good life has been unduly understood either at the individual level, or as the product of the meso- and macro-level determinants. Yet, these levels have been rarely connected together, leaving our understanding of contextual features to be very much limited. What we need is a better understanding of how individuals are linked to the features of the surrounding environments, and above all how social policies, governmental practices, and interventions at the national and global level influence people's pursuit of happiness and well-being.

Second, the scientific research is still lacking an understanding of how Social Justice and Equity shape people's life. Since life satisfaction and well-being are often understood in terms of personal motivation, self-efficacy, and individual pursuit (see Seligman, 2002; 2011; Lyubomirsky, 2001) the literature has extensively ignored that conditions of social justice and injustice in society are likely to foster or hinder the way people lead and enjoy their lives. From a contextual and ecological perspective, we also need to analyse how social justice works at the personal, interpersonal, communal and social level.

Lastly, we also need to frame happiness and well-being within an ethical perspective. This means being mindful that the individual pursuit of the good life is intrinsically connected to the other, understood as other human beings, living things, and the environment in its totality (Noddings, 2003; 1984; Tronto, 1993). We can no longer continue to look at the science of happiness and well-being as a value-free and objective discipline, if that entails ignoring the effect that our life choices have on the outside world. The increase in environmental degradation, the widespread increase of social inequalities and access to resources and opportunities, are but a few examples that should prompt us to reintroduce an ethical view in our understanding of the good life (Natale, Di Martino, Procentese, & Arcidiacono, 2016).

Nonetheless, the three above-mentioned elements are not completely absent from the literature on well-being and life satisfaction. However, context, social justice, and ethics, have been hitherto addressed as three separate domains referring to three vast branches of the scientific literature. As a consequence, they have been investigated as separate areas of enquiry. However, as I have attempted to show in this work, these three tenets are indeed intrinsically dependent on each other, and therefore an integrative phase is momentous. In that regard, there is already some sign of evidence in the scientific literature to suggest that contextualism cannot rule out an underlying system of justice and freedom, and a, ethical and moral-based framework (Sachs, 2013; Prilleltensky, 2012; Veenhoven, 2010; Nussbaum, 2011; Haybron, 2008).

Indeed, including contextual features in people's quality of life entails taking into account the availability of resources lying in the context itself. The latter can be considered well distributed and accessible to everyone only are underpinned by a system of justice that prevents unequal allocations. On the other hand, justice cannot only come down from the above. Aside from a top-down vision, social justice needs also being framed in a bottom-up perspective and this can be obtained only if start acknowledging that everyone in society must give their personal civic contribution.

Moreover, if we accept the notion well-being and happiness are dependent on the resources provided by different contexts, that the latter must be fairly distributed and equally accessible to all and that their use should not damage, rather care for others and/or the surrounding environment, the connection between these elements comes to the fore.

In line with this vision, the third chapter of this work was aimed to showcase two emerging scholarships, namely the Capacilities approach and Community Critical Psychology, to operationalize the principles and practices advocated by contemporary feminism. In fact, both the approaches presented in this chapter have shown an interest in promoting better life conditions in a way that depart from mainstream literature. The Capabilities approach, for instance, considers well-being in terms of freedom of choice and agency. In particular, in Martha Nussbaum's view, well-being consists in the capacity to do and to be what a person wishes to do and to be (Nussbaum, 2011). Community Critical Psychology is very attuned to this vision, in that is strives to promote well-being by empowering people and free them from conditions of oppression (Nelson & Prilleltensky, 2010).

Against this theoretical background, during my doctorate I have been involved in three research projects. Their key feature is the attempt to shed light on the three above-mentioned tenets, namely context, justice, and ethics and what is their impact on people's well-being and life satisfaction. The first study is aimed at developing a new instrument, called HappyApp to study happiness and well-being in a more contextual perspective. The app, which has been designed for both Android systems and OSX, aims to tap into people's appraisal of their day satisfaction as well as satisfaction with important area in their life.

To this end, I have created a list of 19 indicator, which has been developed through the combined contributions of both academics and laypeople. The list will be incorporated in the HappyApp in the second phase of the projects, which also involves collecting and analysing quantitative longitudinal data. As I hope to demonstrate, this instrument holds the promise of overcoming some of the limitations of currently used self-report questionnaires, in a way that is closer to people's daily experience of their happiness and well-being.

The second study demonstrates through empirical analysis in cross-national comparisons, that social justice is indeed one of the fundamental determinants of people's happiness. By capitalizing on the data provided by the Social Justice Index 2011 (Schraad-Tischler, 2011) and the Gallupp World Poll for life satisfaction, I ran a series of quantitative statistical analysis, namely linear regression analyses, to show that a fair and just distribution of resource and opportunities in society are predictive of the way people enjoy their life. The relevance of this study for social policies aimed at promoting life satisfaction around the world (see Layard, 2005) is of extreme importance. Therefore, based on these finings, I proposed a new study that aims to overcome some of the limitations of the Social Justice Index (SJI) developing a new Global Index of Social Justice (GISJ). This work will be submitted as a grant proposal to the European Research Council Starting Grants scheme.

Finally, the last study aims to introduce to the Italian context a new instrument for the assessment of people's moral orientation. Based on the literature on feminist ethics, my entry point was the distinction between two moral concerns, namely the ethics of justice and the ethics of care. The goal of this study was to assess the psychometric properties of a quantitative instrument able to tap into both ethics. After perusing the literature, I have chosen the Measure of Moral Orientation second revision (MMO-2) (Cooper, Liddell, Davis & Pasquesi, 2012; Liddell, 2006), which builds on the previous instrument (MMO) developed by Debora Liddell and colleagues (Liddell & Davis, 1996; Liddell, Halpin G., & Halpin, G.W., 1993, 1992).

The result of this study show that the structure of the MMO-2 can be better understood if rather than using 7 vignettes, as originally proposed by the authors of the instruments, we use only 4 moral dilemmas, each one of them yielding 1 factor for Care and one for Justice. Moreover, other revisions are suggested before the MMO-2 reaches adequate psychometric validity.

The three theoretical chapters along with the three empirical studies comprising this doctoral thesis strived to shed more light on the variety and interdisciplinarity of the happiness and well-being scholarship. By drawing on the contributions of contemporary feminism, the works presented here have all been aimed at demonstrating that happiness and well-being can be reframed in a whole new perspective that takes into account the features of contextual levels of analysis, the presence/absence of just and equitable distribution and promotion of resources and opportunities in society, and the necessity to build the pursuit of the good life on an ethical and moral ground.

I hope that this work will inspire other researchers, scholars, and practitioners to advance even further our understanding of the good life. There is still much ground to cover before reaching a full comprehension of these phenomena, and this work represents a first little step, yet hopefully useful, towards that direction.

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