CHAPTER ONE

Introduction

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The study of inequality is an intrinsic aspect of modern social science. Issues concerning the distribution of life chances, incomes, mobility and opportunity, poverty, and social exclusion have had a prominent place in the social sciences since their inception. In all likelihood, these issues will remain on the social scientific agenda indefinitely. This book aims to take stock of what has been achieved in selected subfields within the larger field of inequality studies. By summarizing the state of the art in topics such as life courses, social mobility, and the comparative use of social indicators and family effects on stratification, we hope to show both that the analysis of inequality has tackled and answered an array of important sociological questions, and that important tasks lie ahead.

The study of inequality fuses normative, descriptive, and explanatory aspects in a way that links the field both to public policy and social theory. As descriptions, studies of inequality explore *how much* inequality there is in quantitative terms: who gets what compared to others? The explanatory analysis tries to find out *why* some get more than others: which social processes at the micro- and macro-levels lie behind the outcome patterns social scientists observe? The normative analysis of inequality is a more philosophical pursuit and asks whether the current state of inequality can be regarded as *just*: by what standards is the distribution of various goods and burdens to be considered fair or unfair, and to whom? These three aspects of the analysis of inequality are interlinked, but they have an asymmetrical relationship. It is perfectly possible to have a description of the current level of inequality without ever raising the question about why it came into existence, or whether it is fair or unfair. But in order to explain differences and changes in inequality, accurate descriptions are crucial; and in order to decide whether inequality is just or unjust, information is needed both about the amount of inequality and why it has come to be.

The chapters compiled in this volume all, in different ways, take stock of the current situation in the analysis of inequality. In doing so, the authors demonstrate that the analysis of inequality has reached new levels of sophistication over the course of the last few decades. Progress is clearly visible both in the quality of data, in the application of methods, and in the kind of theoretical explanations that the authors put forward.

Regarding *data*, three kinds of databases created over the last couple of decades are especially important in the analysis of inequality. The first is truly a longitudinal database, where the same set of individuals is followed over an extended period of time. Such data are immensely valuable because they allow the problem of causality to be tackled more successfully than can be achieved by using cross-sectional data. A perennial problem in analyzing inequality (or any other social process) is that of distinguishing between causality and selection (Ni Bhrolcháin 2001). In contrast to cross-sectional data, panel data will, if properly analyzed, allow the establishment of the time order of events and therefore makes it possible for the analyst to distinguish between causal and selection effects.

A particularly efficient form of longitudinal databases allows register data on various social outcomes (incomes, births, marriages, mortality, etc.) to be merged with survey data on current and past experiences. Examples of two particularly rich datasets in this respect are the two variants of level-of-living surveys conducted in Sweden, by the Swedish Institute for Social Research [www.sofi.su.se/LNU2000/english.htm] and by Statistics Sweden [www.scb.se/templates/Product____12199.asp (all information at this web page is in Swedish)].

The second type of data is derived from cross-national comparative databases. By using such data, analysts may be able to study the impact of national institutions on levels and processes of inequality. A large amount of work has been put into creating truly comparative databases, a challenging task given the difficulties of finding equivalent indicators and harmonizing national official statistics. Two of the most valuable datasets currently available illustrate different approaches to tackling these problems. The Luxembourg Income Study (LIS), the adjoined Luxembourg Employment Study (LES), and the new Luxembourg Wealth Study (LWS) [www.lisproject.org] depend on post-harmonization of data from national surveys (household income surveys and labor force surveys). In contrast, the new European Social Survey (ESS) [www.europeansocialsurvey.org] tries to construct comparability in the original indicators before the surveys are fielded, through an elaborate procedure for securing cross-national validity of samples, indicators, and translations.

The ESS is also an example of a third type of database, one in which objective and subjective data are integrated. The most longstanding such survey is the International Social Survey Program (ISSP, www.issp.org). The ISSP has conducted several modules on "Social Inequality" (1987, 1992, and 1999), and the modules on "The Role of Government" (1985, 1990, 1996, and 2006) also contain data of relevance for the study of inequality. The ESS has been conducted two times, in 2002 and 2004, and will continue as a biannual survey. It contains several attitudinal subthemes of relevance for the topic of inequality, in addition to encompassing data concerning actual resources and living conditions.

The importance of surveys such as the ISSP and ESS lies in the possibility to link subjective aspects of inequality (identities, aspirations, norms, etc.) with measures of actual positions in the stratification system. Such subjective indicators may be seen both as an *outcome* of the stratification process, and as something *affecting* processes of inequality. For example, support for redistribution of market outcomes are to a large degree the effect of the actual experiences of stratification effects (Svallfors 2004). Such support may in turn, if channeled into political support for parties set on building redistributive institutions, affect future stratification patterns and outcomes.

While the situation regarding data in many respects looks bright, two unfortunate circumstances should be pointed out. One is that the particularly rich data that is now compiled by the European Union, data that national statistical agencies are required to collect in each union country, are expensive and difficult to use for the research community. These data are to a large extent harmonized already at the point of collection, which makes them exceptionally valuable for comparative research on inequality processes and outcomes. The use of these data in the research community has however been hampered by (1) the long time lag in the release of the statistics, (2) the extreme data protection measures applied, and (3) the sometimes prohibitively expensive charges for users.

A second problem in data access and comparability is what seems to be a lack of coordination and cooperation between EU-Europe and the United States. The new European Social Survey has no counterpart in the United States; the European Union data, of course, has no counterpart in the United States either. A new European Cohort Study is in its planning stages, apparently with no intended cooperation across the Atlantic [www.fas.forskning.se/en/newsletter/2003/nl103.pdf]. Because the European model of capitalism, in all its variants, is substantially different from the American one, it is highly unfortunate that available data allow only limited comparisons between Europe and the United States. As several of the contributors to this volume point out, the institutional differences between Europe and the United States are likely to be reflected in substantial differences in levels and processes of inequality, but such arguments can now often be exposed to only limited and indirect tests.

The progress in terms of data access has been matched by innovations and new directions in the *methods* applied to such data. Three important improvements should be mentioned. The first is the invention and dissemination of techniques for analyzing longitudinal data (for an introduction, see Blossfeld and Rohwer 2002). Because such data as pointed out above are particularly valuable in trying to establish causal links, it is very useful to be in possession of statistical techniques that allow these data to be successfully analyzed.

A second major improvement is the proliferation of techniques for analyzing categorical data (for an introduction, see Long 1997). Because many of the inequality outcomes of interest are categorical (either a person goes on to university or not; either a person becomes unemployed or not) and not linear, standard regression techniques are often unsuited to the questions analysts want to answer. In such cases, a variety of nonlinear regression techniques are now available alongside other techniques such as loglinear modeling and latent class analysis.

A third valuable improvement in the array of analytical techniques is the increasing use of multilevel analysis (for an introduction, see Hox 2002). Many of the most important causes behind inequality are not tied to individuals but are properties of the contexts in which these individuals are embedded. Information about this context is often crucial for understanding stratification processes. Because such data have a nested structure (for example, an individual can be placed in a certain classroom situation, which in turn is embedded in a local community, which in turn is part of a national policy regime), standard statistical techniques are inappropriate and can yield invalid results.

The basics of all these statistical innovations have been known for a long time, in many cases several decades, and have been widely used for some time. Their application in routine analytical use requires that appropriate easy-to-use software is available, in order to make investment costs less prohibitive. The past couple of decades have seen considerable improvements in this regard.

The list of improvements hitherto provided may strike readers as unduly technical in its emphasis on data access and statistical techniques. Nevertheless, progress in the field is clearly visible also when it comes to *theory and explanations*. Such progress is highly dependent on the improvements in data and statistical techniques but also relies on new thinking, occurring at the boundaries between sociology, economics, and political science.

One such important development, at the boundaries between sociology and political science, is the increasing focus on institutions in effecting distributive outcomes. The concept "institution" is notoriously slippery, but according to one workable definition institutions are "the rules of the game" (North 1990: 3–5), or to use a stricter definition "the formal rules, compliance procedures, and standard operating practices that structure the relationship between individuals in various units of the polity and economy" (Hall 1992: 96; cf. Levi 1990: 405). This definition of institutions only includes deliberately designed objects, such as social security systems, political party systems, collective bargaining systems, and so on, while leaving social facts such as family interactions, class structures, and norms outside the definition. Even based on this fairly narrow definition, it is clear that the presence and impact of institutions are immense in modern societies.

Institutions impinge on distributive processes and outcomes in a number of ways. They modify the structure of rewards and costs inherent in employment contracts, through welfare state intervention or labor market legislation, for example. This modification may either be achieved directly, through keeping employment contracts within certain legal limits, or indirectly through welfare state benefits and taxes or by subsidizing the consumption of goods such as health care and education. Institutions also structure possibilities and incentives. Political institutions structure competition, recruitment, and social mobility, therefore affecting the incentives of social actors.

Important aspects of distributive processes, such as wage setting (Pontusson et al. 2002), income distribution (Korpi and Palme 1998), or access to the labor market (Daly and Rake 2003) are structured by institutions of various kinds. Institutions introduce an element of historical contingency into the play of market forces, modifying market outcomes or even affecting access to the market.

To focus on institutions is therefore to analyze how macro factors impinge on micro action in the creation and maintenance of inequality. Some important strands of current thinking about inequality focus inversely on the micro foundations for macro outcomes. These lines of theorizing occur mainly at the boundaries between sociology and economics. The aim is to model how purposeful action can explain macro social outcomes (such as the distribution of opportunity or resources). Two—partly competing and partly complementary—variants seem to be particularly important. The first focuses on the networks in which people find themselves embedded (Tilly 1998; White 1992; Granovetter 1995). In this rendition, inequality results from the transmission of resources and constraints through networks, as exemplified by migration chains, network recruitment, and diffusion processes, and from inclusion in or exclusion from such networks.

The second version focuses on individual choice within constraints (Goldthorpe 2000, in particular chs. 5, 6, 8, 9). Here we find a focus on rational action, in which individual's (subjective) rationality is the guiding principle behind courses taken. Inequalities in outcomes should be seen here as resulting from the very different constraints facing actors in different positions, rather than in their differing cognitive or emotional evaluation of the choices themselves. A prime example is found in the efforts to explain differing propensities to seek higher education in different social classes, even at constant levels of school grades. The rational action framework here tends to emphasize the different constraints facing children from different class backgrounds rather than class differences in "cultural resistance" against higher education as such (Goldthorpe 2000: chs. 8–9; Erikson and Jonsson 1996).

The developments regarding data, methods, and theory/explanations are mutually dependent. Without new questions about the impact of institutions on inequality, little impetus is provided for the cumbersome process of collecting cross-national comparative data. Without new techniques for analyzing data, these data will remain underutilized and unable to answer the questions put by theoretical developments. Without access to appropriate data and analytical techniques, theory and explanation turn into mere conceptualization or armchair guesswork. If the field of inequality analyses is to continue to thrive, it will depend on a continuous and concerted development of data, statistical techniques, and theory/explanations.

The chapters that follow both draw on and illustrate the current state of research. In Chapter Two, Karl Ulrich Mayer paints the history and current state of comparative life course research. In the first part of his chapter, he tells the story of how life course research developed from a highly general and universal account of stages of human development into a differential life course sociology.

Mayer then follows the attempts to map historical variation in the analysis of life courses. These attempts soon run into severe problems of linking historical periodization with specific patterns of life course outcomes. Historical periodization and the lifetimes of individuals are not coordinated, which make any causal inferences hazardous and uncertain.

Mayer argues that cross-national comparison is a way out, and that it offers a particularly fruitful strategy if researchers want to untangle the complex relationships between institutional characteristics and life course outcomes. Such comparisons may take different directions. A particularly influential direction argues that institutions tend to appear in bundles, conceptualized as "regimes" or "varieties of capitalism." Mayer argues that even though these attempts took social scientists a long way in the establishment of causal relations between institutional arrangements and life course, problems appeared also in this vein of research. The problem is that cross-national institutional variation, and the effects on life course outcomes, defy neat and easy categorization into regimes or varieties of capitalism. The links between institutional setups and individuals' life courses become blurred by such an "over-aggregation" of institutional variation.

Therefore, Mayer maintains that the most feasible way forward is country-specific comparative analysis. Only in this way will it be possible to establish the causal links between institutional macro factors and life course patterns and outcomes. In order to show how such linkages may be established, Mayer turns next to a comparative analysis of institutions and life courses in the United States, Germany, and Sweden. He shows how institutional differences among the three countries in schooling systems, production and firm organization, welfare policies, and labor market relations and regulations tend to give widely differing outcomes in life course outcomes and transitions. From leaving the nest, family formation, transition from school to work, work-life mobility, to poverty rates and durations, the institutional arrangements in each country affect most aspects of life courses in one way or another.

Mayer concludes his chapter by arguing that a focus on country specificity does not necessarily lead to a multitude of unrelated studies and unwieldy variation. If a clear focus is maintained on the mechanisms through which institutions exert their influence, systematic patterns of association are detected beneath the specificity of national arrangements.

In Chapter Three, John Goldthorpe asks whether anything that can be described as "progress" might be discerned within sociology. Goldthorpe points out that sociologists have often tended to answer the question in the negative. Such writers argue either that progress is in principle impossible in social science because all knowledge is context-bound to such an extent that any attempt at generalization becomes impossible, or that although intellectual progress would be possible in the social sciences, none can be observed within sociology.

Goldthorpe argues that both accounts are mistaken. Rather than engaging in a theoretical or philosophical argument about the case, he goes about showing that progress *has* actually occurred within at least one particular subfield within sociology, that of social mobility research. According to Goldthorpe, cumulative knowledge growth may actually be observed within social mobility research to an extent that it belies any argument about the impossibility or nonoccurrence of progress in sociology.

Goldthorpe summarizes progress within social mobility research under four headings: data, concepts and analysis, empirical findings, and theory. Regarding data, the improvements are obvious in terms of both coverage and quality. Coverage has been improved through the growth and routine replication of general-purpose surveys through which data of a repeated cross-sectional kind now allow comparisons both across nations and through time. Quality has improved regarding consistent codings of occupational and educational data, again both across and within countries.

Regarding concepts and analysis, Goldthorpe emphasizes that social scientists should not expect progress to take the form of the gradual movement toward "one best way." He rather points to progress in terms of how specific conceptual problems have been tackled and solved. One particularly important advance in this respect was when mobility research managed to get out of the impasse in which it found itself when trying to apply the concepts of "structural" versus "exchange" mobility. The introduction of loglinear modeling allowed the problem to be reformulated as the more viable and revealing distinction between "absolute" and "relative" mobility rates.

The empirical findings may be summarized as a series of empirical regularities that have been established across a relatively wide range of institutional and cultural contexts. One such important finding is that endogenous mobility regimes, measured as patterns of relative mobility rates, show both a high degree of temporal stability and a fundamental similarity across nations. Accordingly, the documentation of change and variation in absolute mobility rates has to be attributed mainly to changes and differences in the occupational structure within and across countries.

A second important finding is that although the most important factor mediating intergenerational mobility is educational attainment, direct effects from class origin on destination class nevertheless persist. Furthermore, no steady increase of the importance of education may be detected, as would have been predicted by many theories about change in industrial society.

That last observation leads Goldthorpe to conclude that functionalist theories, which would predict increasingly open and meritocratic societies, by and large fail to make sense of the empirical findings from mobility research. Goldthorpe argues that a more micro-oriented theory of rational action has been more successful in explaining mobility outcomes, and that in important respects these kinds of theories are already used to model the relationship between, for example, class background and educational achievement.

In sum, Goldthorpe maintains that considerable progress has been made within social mobility research and the question then arises as to why such progress is such a rare event in sociology. Why has mobility research made progress while many other sociological research fields have not? Goldthorpe emphasizes that because research is a collective product, the explanation should be sought in the way social mobility researchers have chosen to organize. In particular, the wide-ranging institutionalization of international exchange and collaboration, as expressed foremost in the Research Committee on Social Stratification and Mobility (RC28), has been important. In Goldthorpe's view, this international profile has helped social mobility researchers to stick to fairly well-defined and "doable" problems in a sustained manner; it has also helped to protect the research field from "the distractions of ideology and fashion." The question of why other research fields have *not* been organized in a similar manner remains to be answered.

Chapter Four, by Tony Atkinson, illustrates the close connection between the analysis of inequality and public policies, by focusing on the use of social indicators in research and policy. The use of social indicators is an attempt to directly measure social problems and levels of living, instead of relying on indirect measures such as income. Both the European Union and the United Nations have agreed on a number of social indicators to be used as a baseline against which to evaluate policy effects and social change.

Atkinson argues that from a policy point of view, the increasing use of social indicators has been fairly successful by raising awareness of the extent of social problems and by emphasizing political responsibility for solving them. However, the success has only been qualified, due both to problematic links between indicators and policy design, and to conceptualization and measurement problems in the social indicators themselves.

Atkinson particularly points to three of these unsolved problems. One is the conflation of inputs and outputs. For example, it is unclear whether income distribution should be considered an output measure, as often is the case, or if it should not rather be seen as an input measure, because it is just an intermediate vehicle in achieving a fair distribution of well-being. It is important to keep measures of effort separate from measures of end results, and that has not always been the case in comparative analyses.

A second problematic feature is the rush to aggregate indicators into summary measures of well-being. Atkinson points out that such aggregation is highly problematic. For example, it is not clear whether aggregation should take place through aggregating indicators, or though summing individuals with different combinations of deprivation. Furthermore, and perhaps even more problematic, there exists no standard according to which such a summary measure should be constructed. What weights should be attached to different components of a summary measure? What is the yardstick against which different components should be measured?

A third problem that Atkinson points to is the ambivalence regarding nationality; that is, the question of whether success is measured simply by the number of people above a certain threshold, or whether researchers care about distributions within individual countries. A fourfold increase in the rate of poverty in Sweden, for example, would be a dramatic change for that country but would hardly make any difference on a world or even European scale. Conversely, a minor change around the poverty line in China would lift tens of millions of people from poverty and make a substantial impact on the world level.

Atkinson further points out that linking indicators to policies is highly problematic. The main issue is that if changes in the chosen indicators are taken as the sole yardstick against which to evaluate policy, or even for targeting support to developing countries, this measurement may create too strong of incentives to concentrate on these particular goals at the expense of others. Atkinson makes the observation that this process has an uncanny similarity to the production targets set by Soviet-type economies and that similar social inefficiencies are likely to follow.

The last problem Atkinson deals with is measuring levels versus measuring change. He argues that these processes are really two different things and require use of different indicators for measuring levels and for measuring change. For example, in measuring global poverty it may be advisable to use a purchasing power adjustment to establish the base poverty line, but measuring change requires applying national price changes in each country. These measurements may then increase the risk that findings from comparing levels and comparing change may yield inconsistent results.

In sum, Atkinson concludes that the increased use of social indicators has been beneficial in many ways, but that important problems need to be solved if the full potential of social indicators research is to be fulfilled.

One important factor affecting the structure of inequality is the decreasing stability in family relationships over the last few decades. In Chapter Five, Annemette Sørensen asks what have been the effects of this development for social inequality. Sørensen argues that the family plays an important part in the stratification system for three reasons. First, it is a redistributive unit in which resources are pooled and shared. Second, the family serves as source of constraints and encouragements for the achievements of its individual members. Third, it is an important source for the intergenerational maintenance of inequality.

Sørensen wants to discuss what the effects on inequality have been of changes in the family composition and stability over the last decades. The findings come from the United States, where most of the relevant research has been done. The United States could be seen as something of a "worst case scenario," because other risk-hedging and redistributive institutions apart from the family are so weak.

Sørensen first asks to what extent increase in family and household inequality can be attributed to changes in family structure and women's earnings. She finds that the increase in the number of single mother households as well as the growth in single-person households has been one of the sources for increasing inequality in the United States. It is considerably less clear whether the increase in women's earnings has played any large part, although all studies show that increasing inequality in men's earnings has had an important impact.

Second, Sørensen asks whether greater inequality among children has resulted from the changes in family structure. Here, different pieces of research point in different directions, but overall, it seems that changes in family structure have created more inequality in children's attainment than would have been the case if these changes had not taken place. Such differences in educational achievement are then likely to be transferred to increasing inequality in occupational attainment and earnings.

Third, Sørensen asks if the family's ability to transmit advantage to their children has been weakened or, to put it differently, whether the mobility regime has become more fluid as a result of changes in the family. Less family stability could be expected to lead to less close links between family background and individual achievement. On balance, this conclusion is also what Sørensen finds in the literature. Association between origins and destinations is weaker for all "alternative" family forms than they are for two-parent intact families. This finding suggests that as fewer children grow up in two-parent families social scientists may expect intergenerational mobility patterns to become more fluid.

In conclusion, Sørensen discusses to what extent the findings from the United States can be applied to other countries. Sørensen argues that on the one hand, the welfare state in the United States offers a particularly weak buffer against downward mobility and poverty connected to divorce and single motherhood. In more encompassing welfare states, the detrimental effects of marriage dissolution are likely to be weaker. On the other hand, in no country is it likely that the effects of growing family instability will be completely mitigated by welfare policies.

One important aspect of contemporary analyses of inequality has been an increased emphasis on changes over the life cycle and their connections to the institutional framework. In Chapter Six, Sara Arber illustrates this by arguing for the importance of taking gender and family status into account when analyzing inequalities in later life. Arber notes that less attention has been paid to inequalities in later life than might had been expected, given that the period spent after retirement is becoming almost as long as the time spent in employment. Alternative theoretical frameworks for understanding inequality in later life have been formulated. Some of these frameworks argue that inequalities in later life tend to become attenuated, although others point to continuity from working life, or even increasing inequalities between groups in later life. The research hitherto conducted has, however, focussed mostly on class at the expense of gender and family status. In addition, although some research has been conducted on older women, older men have rarely been the object of research.

Using data from Britain, Arber sets out to correct some of these shortcomings. She focuses on how gender and family status affect material circumstances and social relations, and health-related behavior such as smoking and drinking alcohol.

Several interesting results emerge from Arber's analysis. Widows are likely to be materially disadvantaged compared to married women, but their patterns of social relations (as measured by contacts with relatives, friends, and neighbors) are similar to married women. In contrast, widow*ers* differ little from married men in their material resources, but they have significantly fewer social contacts. A drastic summary would be to say that widows become poor while widowers become lonely.

Divorced older women and men stand out as particularly disadvantaged in material terms, and they also display the most health-damaging behavior. Because the group of older divorced is likely to grow substantially as new cohorts enter retirement, it seems imperative that the material and social circumstances of this group are assessed continually. In the current elderly population, a mix of causal and selection effects is likely to lie behind the more disadvantaged situation of the divorced. The selection effects are likely to be smaller in later cohorts, where divorce is more common.

What emerges very clearly in Arber's analysis is that gender relations over the life course are transmitted into later life. Women have most often been the upholders of the family's social life and acted as guardians of health-related behavior. Men have provided most of the family's income. These gendered practices are to some extent different in later cohorts, and it will therefore be highly interesting to study the implications for inequalities in later life.

In sum, the contributions to this book illustrate both the variation and the common themes found in different fields within the larger framework of inequality studies. A wide range of inequality outcomes are included, different sets of groups and categories are compared, and explanatory factors are sought at different levels. Nevertheless, a unifying core of assumptions and analytic approaches connects even seemingly remote subject areas.

What lies ahead? It would simply be foolish to try to write an agenda for this overwhelmingly large and unwieldy research field. One key question, however, that unites several of the book's contributions, involves individualization and increased variability versus stability and reproduction. In many respects, it seems the individuals' moorings to families and organizations in the Western world are less stable and strong now than they were some decades ago (Breen 1997). At the same time institutional variability also increases. Contrary to the assumptions of many globalization theories (such as Castells 1996; Martin and Schumann 1997), little or no institutional convergence between the major advanced industrial countries has occurred in the more deregulated world economy since the 1970s (Scharpf and Schmidt 2000; Huber and Stephens 2001; Pierson 2001; Swank 2002). In some respects, it seems that institutional *di*vergence is taking place, for example between continental Europe and the liberal Anglo-Saxon countries. Furthermore, supranational and subnational institutions have added to the already existing national institutional frameworks rather than supplanting them.

It seems to be a highly pertinent question to ask what implications for life chances, life courses, and social mobility such changes could have. Are researchers likely to witness increased individual variation as a result of increased instability and variation at the institutional level? Will families become less important as transmitters of advantage and disadvantage? Will categorical differences in life chances become muted, or will they emerge even stronger, as risk-hedging institutions such as the family and the welfare state become weaker? Analysts of social inequality will have much to do.

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