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Cumulative and Compensatory Effects over the Life Course

Claudine Burton-Jeangros* and Eric D. Widmer**¹

1 Introduction

Cumulative and compensatory effects have been included in the sociological agenda for a long time – at least since the seminal studies of Merton (1968; 1986) and Zuckerman (1997) were published and since the rise in prominence of the life-course paradigm (Elder, 1974; Cain, 1964) in the social sciences. Studies of cumulative processes have accumulated, especially in social gerontology, in relation to issues of heterogeneity and inequality (Dannefer, 2003; 1988). Why, then, should we dedicate a special issue of the *Swiss Journal of Sociology* to these questions? We believe that the usefulness of the cumulative disadvantage perspective extends far beyond gerontology because it provides a meaningful alternative to postmodern approaches to social inequalities.

Various European authors proclaimed that the end of the social classes and of the so-called “old order of social reproduction” was a core achievement of late modernity. Referring to the vanishing importance of ascribed characteristics, some authors have stated that social inequalities are decreasing and that the remaining inequalities mainly pertain to individual agencies or lifestyles. Various empirical evidences, however, point out that social inequalities and their collective structuration still shape social life even though their nature may have changed. Although individuals from various origins might be more equal to each other when they turn 20 in younger cohorts, this might not hold true at age 30, and is even less accurate at age 40. The same is true for differences between men and women.

The structuralist perspective on social stratification strongly emphasized the first years of life and the family of origin as the determinants of most social inequalities that will later characterize adult life (Bourdieu, 1979). This perspective was disappointing in many ways since the explanatory power of variables related to the family of origin has only a limited ability to predict the achieved social position of an adult individual. Its deterministic twist raised a series of unresolved issues about the applicability of theories that assume a unidimensionality of individuals in multidimensional societies (Lahire, 1998). Casting doubt on the exclusivity of habitus

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1 The authors' names are ordered alphabetically; each provided an equal contribution to this introduction.

and of resources inherited from the orientation family as generative mechanisms of social inequalities does not, however, denote that external constraints (either institutional or interindividual) should be disregarded as structuring principles of individual lives in late modernity. Quite the contrary; we believe that the increasing complexity of societies generates a large number of social inequalities that are even more individualized since they do not entirely rest on traditional social divisions (manual workers versus white-collar workers) but rather on a complex web of partially overlapping social affiliations (participation in social movements, social networks, schooling, employment and family status, migration, leisure activities, etc.). Furthermore, classical literature on social inequalities has primarily focused on men and their position in the labor market without considering women's social positions (Acker, 1978). Investigating social inequalities requires the integration of interactions between the statuses and affiliations that interact in cumulative processes.

These factors may best be understood from a life-course perspective. Although inequality research was mostly synchronic for a long time, interest in processes that occur in time and space and the consequential development of longitudinal methods (both qualitative and quantitative) paved the way to a reconsideration of the main tenets of social stratification and social mobility research by including individual and collective time in the equation. The life-course paradigm insists upon the import of events, transitions, stages, and trajectories in the study of the structuring of individual lives (Levy et al., 2005). Cumulative disadvantages often happen in relation to crucial transitions in life (Sapin, Spini and Widmer, 2007). Specific events may tilt the balance of life toward one side or the other. Of course, the ability to seize the opportunity offered by an event or a transition implies that an individual must have accumulated sufficient cultural and social capital. Hence, what happens in the long term (i.e., the resources accumulated in a time of relative stability) is influential. Therefore, stages and trajectories should also be considered when assessing the accumulation of advantages or disadvantages. Life transitions and life events may be crucial opportunities in which an accumulation of resources, for some, and a plateau or a decrease of resources, for others, may eventually create great inequalities between individuals of a single cohort. The life-course paradigm also insists upon the importance of cohort and period effects (Riley, 1973; Riley et al., 1972). Here, as well, the cumulative disadvantage perspective offers the opportunity to extend the empirical work on social stratification by emphasizing the historical contingencies of social inequalities associated with cohort effects (Chauvel, 1998). Furthermore, examining how advantages and disadvantages, in the context of family, are passed from one generation to the next is also highly relevant.

This special issue is based on the premise that the linkages between research on social stratification and research on life-course sociology, which have been made

possible by the cumulative-effect perspective, constitute an opportunity for sociology to improve its understanding of social inequalities in late modernity.

2 Current Issues Related to the Cumulative-Effect Hypothesis

There are at least two ways in which the cumulative-effect perspective is understood by the contributors to this special issue. The first viewpoint, which is directly related to Dannefer's seminal paper (1987), is based on the definition of cumulative disadvantage as "the systemic tendency for interindividual divergence in a given characteristic (e.g. money, health, status) with the passage of time" (Dannefer, 2003; Dannefer, this volume, 193). According to this perspective, cohorts of individuals tend to become more heterogeneous as they grow older. This diversification is mostly explained by macro- and meso-sociological mechanisms that are associated with the competition among individuals within organizations for scarce positions. In that competition, individuals with prior resources and credentials are better equipped to succeed. Their achievement of prominent positions is later interpreted by others as a confirmation that they are successful, which provides them with additional resources that promote further success in a never-ending virtuous circle. Those who do not succeed early in life tend to stabilize or even to regress in comparison with those who did succeed early. In this conception of cumulative effects, age is considered a crucial element and is interpreted in relation to age norms as a sign of success or failure. The individual who does not reach some position at some defined age is considered to be a failure. Interestingly, this first perspective includes a social interactionist twist because the perceptions of others are crucial in defining the individual's advancement.

The second perspective of cumulative effects is less stringent concerning cohort, age, position, and heterogeneity. This viewpoint does not assume that individuals compete for a limited set of positions. It does not give an analytical prominence to cohorts and does not consider age as a marker of success or failure in relation to age norms and specific occupational domains. Rather, this perspective questions the assumption that most social inequalities are determined in childhood by socializing processes that promote fixed *habitus* that remain unchallenged by later life transitions and events. According to that second perspective, the primary issue does not concern how previous disadvantages put a person at risk in the race with individuals of his or her cohort; rather, the question regards how individuals with originally small differences of social backgrounds become increasingly unequal in terms of wealth, health, or social capital later in life. What mechanisms, in other words, contribute to differentiating life trajectories and causing successful individuals to acquire more than unsuccessful persons?

Of course, the two perspectives have much in common since they share the same basic postulate that social inequalities tend to cumulate over individual trajectories. The predicates of the first perspective, however, are more specific and lead to confirmatory analysis, whereas the second perspective is more exploratory and does not equate cumulative disadvantages with allocation issues.

3 The Contributions

The papers in this special issue consider how the interplay among family, health, and occupational trajectories affects gender, ethnicity, and social inequalities. Some authors address the issue of compensatory mechanisms of social inequalities, i.e. mechanisms that oppose cumulative effects and that rebalance individuals' life chances. The contributions are organized into three parts: a first series of papers that address cumulative disadvantage on a theoretical level; three contributions that explore cumulative disadvantage in education, work and family life; two papers that discuss cumulative disadvantage in health.

3.1 Theoretical Contributions

This special issue begins with an invited contribution from Dannefer, a leading scholar on cumulative dis/advantage and a co-editor of this issue. His article, "Stability, homogeneity, agency: Cumulative dis/advantage and problems of theory," discusses three enduring issues in the application of the concept of cumulative dis/advantage to the life-course: stability or change, homogeneity or variability, and structure or agency. The paper first examines the contribution of cumulative disadvantage to the stability of social systems. Rather than conceiving heterogeneity and change in inequality as a source of chaos, Dannefer states that cumulative disadvantage is a central element of the prevailing social order because it stems from the labor market, healthcare, and other stratified systems of the welfare state. Second, Dannefer acknowledges that some homogeneity of the aging process within cohorts has been assured by the institutionalization of the life course. Under the conditions of late modernity, however, the continued strength of age-based homogeneities may be weakened by the de-standardization processes that probably reinforce cumulative dis/advantage. Third, human agency and social structures reinforce each other in the accumulation of disadvantage. The level of interpersonal interaction and the microdynamics of everyday life produce stratified assessments of others that translate into differential dis/advantage. Overall, this contribution suggests that because current societies experience a process of de-standardization of the life-course and emphasize individual agency and individual risks, cumulative disadvantage as the structuring principle of social inequalities may increase in significance.

The second contribution, by Pallas, connects the cumulative-advantage tradition with another influential perspective, Pierre Bourdieu's theory of social reproduction. Pallas's article begins by reviewing the concept of cumulative advantage and the diverse ways in which the term has been used in the literature on stratification and the life course. The article proceeds to show how the key concepts in Bourdieu's theoretical framework (capital, field, and habitus) can be used to enrich the cumulative-disadvantage perspective. Rather than opposing Bourdieu's perspective and the cumulative-disadvantage perspective, the article explains that the conjunction of the two approaches makes it possible to redefine what constitutes evidence of cumulative advantage and what constitutes a resource while viewing the habitus as a mediating variable between resources and strategies.

The contribution of Schafer, Shippee, and Ferraro, "When does disadvantage not accumulate? Toward a sociological conceptualization of resilience" expands the cumulative-disadvantage hypothesis in the direction of resilience, a phenomenon that may, at first, be interpreted as a contradiction to the cumulative-disadvantage hypothesis. The authors emphasize the need to develop a theory that explains how early disadvantages lead to a range of outcomes, both negative and positive, rather than considering only cumulative trajectories. Although structural disadvantage and inequality have the propensity to stifle life chances, some people are able to surmount considerable obstacles in social life and to avoid the consequences of accumulating disadvantage. Resilience holds promise for the study of life trajectories but has received little systematic consideration in sociological research. Unlike some research in psychology, which has emphasized the genetic and individual components of resilience, this essay offers a typology that encompasses the different sociological expressions of resilience and their embeddedness in social structures.

3.2 Cumulative Disadvantages in Education, Work, and Family Life

Giudici's and Gauthier's paper analyzes the differentiation process of male and female occupational trajectories after the birth of a first child. Based on the Swiss Household Panel data, typologies of professional trajectories for men and women are defined by optimal matching. The results highlight important differences in the typical work trajectories of men and women. Women are more likely to continue working after the birth of their first child if they worked part-time before this transition. Higher education is associated, in their case, with both better opportunities and motivation to participate in the labor market. Additionally, a female's trajectory is significantly influenced by her male partner's professional status. The opposite is not observed, i.e. the results do not indicate male adaptation to a female partner's professional situation even after the transition to parenthood. The study concludes that transition to parenthood constitutes a disadvantage for women's occupational trajectories, with consequences that will accumulate over time against their work opportunities, whereas this transition is favourable to men's occupational trajectories.

In her contribution, “*Entre être et devenir femme: Trajectoires de précarité féminine et désindustrialisation en France et en Italie*”, Pernigotti focuses on two regional, rural contexts that are characterized by a large deindustrialization that has occurred in recent decades. Pernigotti’s goal is to show, through a qualitative approach, the ways in which the life trajectories of unskilled women are shaped by their social contexts. The article considers two main series of factors. First, the factors related to family life and gender inequalities in partnerships are revealed. Many disruptions originate from the unwillingness of male partners to let their spouses work full time or from the priority given to the male partner’s career when residential moves are necessary. Childcare is also considered, in both contexts, to be a female responsibility. Therefore, the transition to parenthood is a negative factor for women’s careers. Those various dimensions of family trajectories cumulate and make it highly unlikely that unskilled women will develop stable and cumulative professional trajectories. A second series of factors relates to the economic structure. Economic downsizing meant, for many women, the loss of their jobs at critical ages of life, after a significant number of years were spent in a certain business, and when it was too late, for many of them, to acquire new jobs. Such an event can trigger a series of processes that interact with family mechanisms to make unskilled women develop a trajectory of precarity.

In “*Differential and cumulative effects of life course events in an intergenerational perspective: social trajectories of three-generation family lineages*”, Aboim and Vasconcelos present results from a qualitative, in-depth biographical study conducted in Portugal, that examined the trajectories of three-generation lineages. The authors highlight the importance of combining the classical approaches of social mobility with a life-course perspective that introduces individual agency. The inclusion of three generations enables the consideration of social change since the interviewed persons lived in different social contexts. Three types of intergenerational trajectories are described: loss of accumulation, low accumulation, and continuous accumulation. Families characterized by a loss of accumulation are those in which disadvantages are more numerous than advantages, i.e. loss occurs in various dimensions of the life course and obtained gains are lost due to these disadvantages. Over time, these lineages experience a decline in their social positions. In the low-accumulation situation, intergenerational trajectories remain stagnant as a result of the predominance of disadvantages. Because of their available social capital, however, these families can limit the negative impacts of disadvantages and disruptive trajectories and can therefore maintain their positions. In a situation of continuous accumulation, educational and professional trajectories improved between generations, and positive events eventually improved the social conditions of these families. In addition to providing an intergenerational view of these issues, this paper also emphasizes the importance of considering the various areas of the life course since dis/advantages

have a stronger impact when they are more diverse, i.e. when they occur in diverse spheres of individual lives.

Testenoire's article, "From social complexity to atypical life courses, the contribution of an eventful sociology", analyzes the occupational and family-life trajectories of a sample of women and another sample of couples that had working-class backgrounds in France. From the cumulative-disadvantage perspective, the paper examines the interactions of gender and social class in the crucial events and transitions of the life course. Rather than emphasizing the impact of socialization mechanisms, the article reveals the importance of contingencies in life courses. Considering the examples of two women who have seemingly similar families and educational backgrounds but diverging trajectories, the article reveals the importance of the way in which life events are framed and reacted to by individuals. Testenoire convincingly suggests that non-normative events do not appear randomly but rather are part of the social fabric. In addition to trajectories and transitions, single events, either normative or non-normative, constitute a crucial dimension of the cumulative-disadvantage perspective.

We should emphasize that these four papers provide important insights into gender inequalities, an area that is underdeveloped in the discussion of cumulative dis/advantage (Hagestad, 1999).

Salane's paper, "Being a student in prison: Continuing or catching up with the school career?", applies the cumulative disadvantage perspective to inmates who pursue postsecondary studies in French prisons. One of the striking results of this study reveals that even in outcast and disadvantaged social groups such as prisoners, processes of cumulative disadvantages occur. Based on a sample of 45 inmates, most of whom were sentenced to long imprisonments, the article demonstrates that trajectories of individuals who follow higher-education curricula while serving their terms can be categorized into three distinct types. The first type features inmates who had significant educational credentials before they were sent to prison. Most often, these individuals have upper-class backgrounds, and the curriculum in prison is a logical continuation of their previous life experiences and lifestyles. A second type of inmate includes individuals who attended but did not complete technical school. Those persons view their time in prison as a chance to finish what they had previously left unfinished, for various reasons. This type of inmate often comes from the middle class and benefits from external resources that make schooling easier and more efficient. A third and final group comprises individuals who are very similar to the average French inmate; they have low educational backgrounds, disadvantaged family backgrounds, and histories of disrupted schooling and occupational problems. Interestingly, it is much more difficult for members of this group to pursue academic studies due to their lack of external and internal resources (financial support from relatives, academic habitus, etc.). The article provides a peculiar example of the mechanisms that create cumulative disadvantages in all kinds of social settings.

3.3 Cumulative Disadvantage in Health

In their paper “Psychological health: An analysis of the intersection of cumulative disadvantage and partnership events”, Budowski and Tillman focus on the associations between changes in partnership (new partnership, divorce or separation, widowhood, etc.) and psychological health. In relation to the vast literature on health inequalities, the authors test the impact of changes in conjugal relationships on well-being from the perspective of cumulative disadvantage. The focus on partnership events is justified by the importance of the family cycle in the structuration of individual life courses. Using the Swiss Household Panel data, the article confirms that separation, divorce, or death of a partner is associated with a decline in psychological well-being. New cohabitation or marriage is beneficial to men’s health but not to women’s health. The analysis, however, concludes that partnership events and gender do not satisfactorily explain changes in psychological health and that social support plays a significant role in psychological health variations. The authors also state that social position during youth, current material resources, and social support are most relevant to psychological health status.

Siegel, Akincigil, Amin, and Crystal present a paper on “Cumulative advantage, educational attainment and late life health status”. Health status for individuals who are over the age of 65 is the result of many influences that occurred throughout their life course. The authors examine the complex pathways that exist between educational attainment and late-life health status in the light of cumulative advantage. This implies going beyond sequences of life-course events by examining how these sequences are shaped by social constraints and institutions. The authors conduct an analysis of beneficiaries of United States Medicare, which provides basic healthcare coverage for the elderly. Results show that education level strongly influences health differences among individuals aged 65 and older. Income, supplemental health insurance, and access to care, however, only play minor roles in explaining this relationship. Additional individual characteristics related to education (attitudes, knowledge, use of preventive care, etc.) are expected to mediate the association between education and late-life health. The authors consider that, in addition to processes of cumulative dis/advantages in the life course, social policies play an important part in late-life inequalities. The article concludes that publicly funded care in midlife could have an important buffering effect but also that social policies can contribute to reducing health inequalities in late life.

4 Conclusion

Overall, the contributions to this special issue reveal the various ways in which inequalities in a range of resources (education, health, social support, etc.) accumulate within cohorts of individuals as these move through their life courses in various

social and institutional domains. In contrast to the argument that inequalities are primarily a function of socialization processes that occur in early childhood, the authors all consider how opportunity structures associated with institutionalized life stages and gatekeeping at key life-transition points independently contribute to sustaining and, in some cases, creating inequalities. Social class and gender clearly contribute to important differentiation processes, but this issue demonstrates that processes of cumulative dis/advantage also account for discrepancies among individuals who have similar social backgrounds.

This special issue also highlights the idea that understanding social inequalities requires considering individuals' trajectories in their interrelated dimensions and especially examining how family configurations, work opportunities, and health statuses interact in dynamic processes. Family situations can either facilitate or limit work opportunities; a good health status is a necessary resource for entering into a conjugal relationship or for accessing some jobs. But the loss of a job or the break-up of a couple influences health status negatively. Furthermore, this issue's contributions also note that observing individual trajectories is insufficient since they are embedded in social networks. The trajectories of both members of a couple are linked together not only by parenthood but also by their decisions about work participation. The assets or disadvantages of previous familial generations appear to be determinants of opportunities for individuals in the long run.

In addition to the importance of individual characteristics and the resources (or lack thereof) offered by one's immediate social environment, the contributions to this special issue emphasize that many dimensions of the life course are influenced by the opportunities and constraints of the broader social context. Interactions between childcare responsibilities and work trajectories are clearly dependent upon the availability of public childcare facilities; interactions between social status and health are mediated by access to healthcare resources; work opportunities are influenced by the economic context but also by the public policies that regulate access to employment. Therefore, the interactions occurring among the areas of the life course (family, work, and health) are shaped by social policies and by the extent to which these policies focus on the reduction of social inequalities.

The collection of papers presented here also illustrates the usefulness of combining quantitative and qualitative methods when studying cumulative dis/advantages over the life course. Quantitative data provide important insights into the ways in which social trajectories build over time and are altered by events, transitions, and turning points, the occurrence of which is, to some extent, unpredictable. Large data sets are useful for discovering differences between groups – for example, differences between men and women in their relationships to work. Further developments in longitudinal analyses will certainly help clarify the many pathways through which dis/advantages cumulate over time in individual or family trajectories. Qualitative data provide different insights by observing how individuals interpret their trajectories

and associate their dis/advantages with events or transitions that they encountered. Furthermore, qualitative research allows access to marginal populations (prisoners, for example) or populations that are difficult to identify through probabilistic sampling procedures. The interplay of quantitative and qualitative results is, therefore, beneficial for developing a more complex and refined understanding of the social processes that are associated with cumulative advantage over the life course.

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