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## **Differential and Cumulative Effects of Life Course Events in an Intergenerational Perspective: Social Trajectories of Three-Generation Family Lineages**

Sofia Aboim\* and Pedro Vasconcelos\*\*

### **1 Introduction**

Social mobility has often been viewed as highly dependent on advantages or disadvantages passed from earlier to later generations in terms of unequal resources (economic, cultural and social) and socialization patterns. These inheritances would constrain individuals' ability to achieve better social positions, even though structural changes have improved the overall standard of living and reconfigured the class structure of developed societies. Structuralist approaches have, however, neglected the importance of life course dynamics as well as the existence of non-reproductive class trajectories, which defy the strict continuity between inheritances and achievements. Over time individuals live through changing experiences and turning points that recreate social conditions and dispositions, redefining the structure of future opportunities. Hence, the centrality of a life course approach to understand the complexity of mobility trajectories.

The aim of this article is to identify those transformative life course events, advantageous or disadvantageous, and their cumulative and differential consequences to individuals' and families' social trajectories in terms of class mobility. Drawing upon the biographies of three generations of individuals from nine family lineages, encompassing most of the 20<sup>th</sup> century in Portugal, we hope to explain the different social trajectories of lineages which had the same relative point of departure in the oldest generation. Rather than the effect of singular events, we explore the differential outcomes of complex chains of positive and negative life course events across three generations.

### **2 Cumulative (dis)advantages, social mobility and the life course**

Merton's (1988) classical concept of cumulative advantages and disadvantages, initially aimed at scientific career progression, has been extensively used in approaching wider processes of inequality, from schooling and work careers to family contexts and poverty. In his words, it "directs our attention to the ways in which

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initial comparative advantages of trained capacity, structural location, and available resources make for successive increments of advantage such that the gaps between the haves and the have-nots in science (as in other domains of social life) widen until dampened by countervailing processes" (Merton, 1988, 606).

Further developments have linked this idea to either individual or between-groups inequalities, focusing on the ways they progress exponentially over time and how even small differences in past conditions determine larger future differentials. In such perspectives, conditions of departure and primary socialization are of primordial importance and even later processes are viewed as strengthening the initial (dis)advantages (DiPrete and Eirich, 2006). This basic principle was easily applied to the analysis of social mobility, which has been a major theme of cumulative (dis)advantages literature, particularly within functionalist perspectives on stratification. Most often disregarding the dynamics of the life course over time in favour of an emphasis on primary socialization and group affiliation, social mobility was generally viewed as the static distance between earlier and former generations' status in occupational structures (Erikson and Goldthorpe, 1992).

Social mobility has been approached from structuralist perspectives, which neglect agency and even micro-level events that disrupt linear transmission of social positions (unexpected health problems or deaths, for instance). In Bertaux's (1977) previous account of anthroponomy, social mobility is considered irrelevant when compared to the strength of structural fluxes of change. Even in Bourdieu's post-structuralism (1979), whose aim was to overcome the structure/action dichotomy, reproductive processes dominate explanation in an oversocialized view of the individual, criticized by Lahire (2001) amongst others. On the other hand, there are those that see agency and reflexive strategies as the source of social mobility, drawing on actors' preferences and choices, such as all forms of rational choice theory (Elster, 1993; Boudon, 1977). In all these perspectives, a more complex view of the interplay between structure and agency over time is missing.

In our view, and following major trends of contemporary life course theory (Elder, 1994; Heinz and Krüger, 2001; Brückner and Mayer, 2004), the study of social mobility must integrate those two features, structure and agency: the macro approach, placing individual and family trajectories in the broader social context; the micro approach, observing the flow of diversified biographies (Bertaux, 1993), the ways through which they are linked together, and the choices people make (Elder and O'Rand, 1995). Only through this double perspective can one understand and explain intergenerational changes, as well as the processes that, in each generation, lead to the continuous and/or changing accumulation of specific (dis)advantages.

Life course approaches have shed a new light on the connection between cumulative (dis)advantages and social mobility (Blau and Duncan, 1967; Duncan, Featherman and Duncan, 1972), whether pointing to societal processes of inequality (such as race or gender) or to individual-based differentiations and trajectories (such

as family transitions or achievement careers). Several studies have developed Blau and Duncan's analysis of educational attainment and included other life course factors, such as work experiences (Kohn and Schooler, 1983) or subjective achievement ambitions in the transition to adulthood (Spenner and Featherman, 1978).

However, the complex ways through which conditions of departure interact with later events and processes are not fully understood. As DiPrete and Eirich (2006, 292) state, one needs to move "toward a deeper understanding for the reasons why trajectories diverge at both the group and the individual level". Even more so because, as Merton hinted (1988, 618), exponential growth of differentials is not unlimited. Even though cumulative processes occur, we argue that they must be seen as resulting from the interplay of shifting advantages and disadvantages over time. Initial conditions may change because the life course, understood as a sequence of "socially defined events and roles that the individual enacts over time" (Giele and Elder 1998, 22), is dynamic, due to the transformation of historical constraints and the role of agency in permanently adjusting to new structural conditions.

Life course events are the compound of diverse turning-points (marriage, parenthood, entering the labour market, migrating, etc.) and durable experiences (socialization processes, relationship dynamics, etc.) throughout individual and family lifetimes. These transitions and trajectories, as Elder (1985) defines them, produce subjective dispositions and objective structures of opportunity and are, thus, key-variables in understanding the differential construction of social mobility processes through the accumulation of (dis)advantages. Over time, life course events, in each generation in its historical and geographical context, produce differences in later stages of life and in younger generations, even if departing from the same social position. Precedent conditions, whether negative or positive, may be reinforced through cumulative processes or, inversely, countervailed or even reversed intra or inter-generationally.

We expect that differences in social mobility, other than macro-reconfigurations of class structure, will be related to life course events which affect trajectories according to the relative ratio of positive/negative effects (upwards or downwards) in each generation, either reinforcing or countering previous mobility dynamics, through shifts in the forms of resource accumulation. More than the simple sequence of events and transitions, we anticipate that it will be "the sum total of the person's actual experience" (Mitchell, 2003, 1051), that is, the overall combination of positive or negative effects in different areas of the life course (childhood, school, work, conjugality, migrations, etc.), that generates, in each generation and affecting the departing conditions and formative years of generations to be, families' and individuals' class positions and their mobility dynamics. Shifts in the accumulation of resources (economic, educational and social capitals) will be more advantageous over life courses as more of those resources are transposable both to new structural



contexts and later generations. Furthermore, (pre)existing resources will influence the overall impact of accumulated (dis)advantages.

### 3 Study overview

The methodological design of this research adopts an intergenerational perspective on the basis of 9 three-generation lineages selected from a total of 60 in-depth life narratives of 10 male and 10 female lineages living, at present, in urban Lisbon and rural, semi-industrialized, Mondim de Basto (northern Portugal). It was carried out among families from different class backgrounds.<sup>1</sup>

To each generation of interviewees corresponds a different historical time of entry into adulthood (Viegas and Costa, 2000). The grandparents (Generation 1) lived under the right-wing authoritarian and colonialist regime of the *Estado Novo* (1926–1974), witnessing the transition between a profoundly rural society, overall illiterate and poor, to a growingly urban society that starts industrializing and developing a modern service sector in the late 1950s and 1960s, at the same time that it suffers from the limitations of a long-lasting dictatorship involved in a three-front colonial war. The parents (Generation 2) portray the country of deep revolutionary changes post-1974: the overthrow of the authoritarian regime in a left-wing military coup, which brought about the destruction of economic elites and the nationalization of the main productive activities in the context of the first world oil crisis; the constitution of a democratic state-of-law with universal and equal civil rights which developed a European Union oriented policy from its onset. The grandchildren (Generation 3) are representative of those born and raised in the Portugal of the European Union, benefiting from the massive developments achieved over the last few decades, in an increasingly modern and urban society, much more qualified, with a modern and globalized market economy.

As a result, in our research generations are genealogical positions in family lineages (Favart-Jardon, 2002; Kellerhals et al., 2002; Biblarz et al., 1996) as well as the relative outcome of similar historical processes (Manheim, 1952; Elder, 1974; Hareven, 1982; Glenn, 2003), linking individual, family and social history, as pointed out by Bengtson and Oyama (2007).

Regional diversity was also a criterion in the choice of family lineages, since Portugal developed at a very asymmetric pace, giving rise to strong territorial differentiations. At present, the three generations of each lineage live either in Lisbon, the richer centre of Portuguese modernity, or Mondim, an example of the mix between transformed rurality, semi-industrialization and low qualified services that

<sup>1</sup> The research was funded by the public Portuguese Science Foundation. Interviews with family lineages were carried out, using a snowball sampling method, in two regional settings from September 2007 to May 2008. Families were selected according to the educational attainment of the latest generation: basic, secondary and superior education.

characterizes many parts of former rural regions. With this regional differentiation we analyse individual life courses and family trajectories in geographical settings with different structural opportunities.

### 3.1 Sample

From the overall sample, we selected 9 lineages, 7 female and 2 male, in a total of 27 interviews, according to their low and poor point of departure in the oldest generation. Grandparents and grandmothers were unqualified manual workers, illiterate or with at most four years of schooling – a profile that represents the majority of the Portuguese population in the 1940s and 1950s, when more than half of the labour-force worked in agriculture and 97% of individuals were illiterate or had at maximum four years of primary education. At their origin, they did not have relevant forms of capital (educational or economic) other than social capital. A second reason for this choice of low qualified grandparents is that it is in these lineages that we better observe social mobility processes. The other 11 lineages, that were better-off from the outset (some of them even highly privileged), have much more stable intergenerational class trajectories. In this last case, when change occurs it is more often the classical case of the reconversion of economic into educational capitals. By maintaining relative class homogeneity in the first generation we expected to evaluate more thoroughly the impact of life course events in the building up of divergent social mobility processes.

The criterion of the low point of departure has led us to select more female than male lineages, as the later have, within our sample, a better social standing from the outset. However, even though discourses are feminized, the narrative method of data collection enabled us to collect detailed information on all family members, including conjugal partners in all generations. Thus allowing us to escape, to a certain extent, a gender biased approach. Family and individual trajectories, male and female, are reconstituted in-depth from birth to the present day.

## 4 Analytical strategy

Drawing upon biographical narratives, the analysis of these lineages enabled us to identify, inductively, several types of life course events (turning-points and durable experiences) and their total sum within and across generations. These events produce differential advantages and disadvantages whose effects are cumulative not only individually but also intergenerationally. Furthermore, most life course events of an individual can not be seen as disconnected singular occurrences, even though singularity and unpredictability are also a part of peoples' lives. Events constitute links in a chain which generates specific biographical processes.

In this first analytical step it was important simply to list the factors encountered before seeing their interplay and impact on class mobility. Many of them, such as fertility (Tien, 1961), socialization processes (Bengston, 1975) or school and work experiences, have already been identified in other researches concerned with social mobility (Nunn et al., 2007).

At a second stage of the analysis, we sought to identify the interplay of different events and their overall impact on mobility. For that, we reconstituted the lineages' trajectories in two steps. Firstly, we characterized each generation, starting with the family of origin of the grandfather/grandmother's generation, from the viewpoint of educational attainment and class positions.<sup>2</sup> This enabled us to reconstruct not only the social trajectory of the interviewees but also that of their spouses, thus permitting to access couples' class trajectories in an integrated manner. Secondly, life course events of individual and conjugal biographies, previously identified, were classified according to their positive or negative impacts on mobility, that is to say, on the processes of resource accumulation. For each case, we thoroughly identified all the positive and negative life course events. Thirdly, trajectories and specific events were placed and interpreted in their historical and geographical context of structural constraints and opportunities.

## 5 Results

### 5.1 Life course factors influencing social mobility

A list of the life course events identified in our empirical analysis is presented in table 1. Events are classified according to their effect on mobility as advantageous, disadvantageous or ambivalent (dependent on other factors). Turning-points and durable experiences are most often entangled in individual life courses, since the latter normally include several of the former (Elder, 1985). Some of these events are of an institutionalized feature, such as entering marital life or going to school, others have a more random nature, even if not completely disconnected from social conditions.

A good example of the latter can be found in health conditions and experiences which are triggered by physical or psychological diseases. Several studies have proved the correlation between disadvantages in education attainment or the

2 Class positions were classified according to a multi-dimensional perspective of class differentiation in the tradition of Bourdieu's analysis (1979). This perspective, which heavily draws on socio-professional categories as a good indicator of economic and educational capitals, is the result of previous research on family life in Portugal (Aboim, Cunha and Vasconcelos, 2005). The typology developed differentiates nine classes: Entrepreneurs and managers (EM); Intellectual and scientific occupations (ISO); Technical and intermediate employees (TIE); Self-employed (SE); Small businessmen (SB); Small peasants (P); Clerical and commerce employees and similar (CE); Low qualified employees (LQE); Qualified industrial workers (QIW); Non-qualified industrial workers (NQIW); Agricultural workers (AW).

material conditions of families of origin in patterns of adult health (Blane et al., 1999; Walsemann et al., 2008). In the lives of those departing from the bottom of the social ladder, disease represents a double burden: not only it affects individual capacity for action and work, which constitutes a decisive asset, but it also diminishes the often few available resources. Generally, severe health problems constitute a clear disadvantage, particularly when welfare support and/or positive discrimination policies are non existent.

Table 1: Life course factors and cumulative advantages/disadvantages

Type of life course events	Effect on Mobility
1. Severe health problems (includes depression)	Disadvantage
<b>Family of origin dynamics</b>	
2. Parental violence	Disadvantage
3. Lone parenthood (generally death of father in childhood)	Disadvantage
<b>Socialization</b>	
4. Socialization for survival and immediate need	Disadvantage
5. Socialization for work	Ambivalent (depends on other factors)
6. Socialization for school	Advantage
7. Anomic and unstable socialization	Disadvantage
<b>Educational experience</b>	
8. Good school experience and progression	Advantage
9. Bad school experience, dropping out	Disadvantage
<b>Experimentalism</b>	
10. Anomic experimentalism	Disadvantage
11. Open experimentalism	Advantage
<b>Homogamy</b>	
12. Marriage above	Advantage
13. Marriage beneath	Disadvantage
<b>Conjugal dynamics</b>	
14. Conjugal break-up	Disadvantage
15. Conjugal violence	Disadvantage
16. Conjugal cohesion for mobility	Advantage
<b>Fertility</b>	
17. Control of fertility	At the least maintains
18. Non-control of fertility	Disadvantage
<b>Work experience</b>	
19. Failure of business or work projects, unemployment, job instability	Disadvantage
20. Good job: state, military or with progression opportunities (includes ressocialization in the workplace), successful business	Advantage
21. Migration (internal or external)	Advantage, or at least maintains (depends on accumulation)

In our cases, the dynamics of the family of origin as well as socialization processes are not absolute determinants of social mobility, but constitute, in most cases, very important initial advantages or disadvantages (Bengston, 1975). Parental violence and severe neglect, being raised by a lone parent (generally the mother), a socialization for survival and the satisfaction of immediate needs (which implies the transmission of the trauma of poverty, the immediateness of urgent necessity and being constrained to go to work at an early age), or an anomic and unstable socialization, that is without any regulation or purposes, constitute clear disadvantages. On the other hand, socialization processes which inculcate a school-oriented culture are very advantageous. Socialization for work, that is to learn a trade and have a more stable employment, can be ambivalent: when combined with other advantageous events it is generally a positive force for professional achievement; when combined with disadvantages it can be a negative force, either by trapping the individual in a “bad job”, or by undermining a school socialization in the next generation.

The overall educational experience is deeply linked to socialization patterns, although that experience can be relatively autonomous from family origin, depending on school life itself (relations with teachers and colleagues, learning ability, etc.). As such, having a good school experience and progression is, quite obviously, an advantageous factor. The reverse, which leads to weak knowledge acquisition and dropping out, is disadvantageous (Nunn et al., 2007).

Adolescence and young adulthood are periods marked by important transitions which promote individuals’ progressive autonomy from parental authority. An experimentalist attitude may be part of these processes, mainly in recent generations. Life-style experimentalism may induce openness to new life conditions and therefore have advantageous effects on mobility: travelling or expanding the personal network of relations to more diversified social circles were revealed as important factors affecting early decision-making processes. On the other hand, experimentalism can be anomic and generate, for that reason, disadvantageous effects: excessive emphasis on pleasurable and alienating experiences undermines individuals’ capacity for pursuing coherent school and employment strategies (a maximal example would be a drug addict).

Marriage and its dynamics are, by definition, central aspects of family life, and could not but have strong impacts on intergenerational mobility, either by the nature and amounts of resources brought by the spouses, the specific characteristics of conjugal dynamics and projects or the reproductive choices people make. As such, one can verify that marrying someone with a better class position tends to produce advantageous mobility dynamics. The reverse, on the other hand, tends to downgrade life conditions and possibilities at the time of marriage. Generally there is a strong tendency for the subsequent relative homogenization of the spouses’ social positions, but in a strongly gendered way, given that in most cases women’s social standing tends to adequate itself to that of men’s, and not the reverse.

Besides homogamy, which is a classical factor, a life course perspective reveals the importance of interactions throughout the life cycle. Conjugal cohesion (namely towards mobility) is as advantageous as break-up, divorce and violence are globally disadvantageous for resource accumulation (Biblarz and Raftery, 1993). Likewise, fertility restriction is also a known strategy of resource concentration, or at least of non dispersion. On the contrary, uncontrolled fertility increases the poverty and low standing of those whose resources are already scarce (Tien, 1961).

Work is a key area in the understanding of mobility (Nunn et al., 2007). However, herein it is not viewed through the static approach normally used in the construction of class positions, but analysed in its biographical duration as an experience of work characterized by a succession of positive (having a stable or well-paid job, successful business, progression opportunities, adjustment to open work cultures, etc.) or negative events (unemployment, failure of business or work projects, job instability, etc.). As school success, professional achievements have multiple impacts, heavily influencing individuals' strategies, and their adjustments over the life course, as well as the socialization patterns transposed to the next generation.

In the Portuguese case, scarcity conditions have traditionally led to strong migrational fluxes, internal and external. If marriage is traditionally a means of upwards mobility for women, migration has been one of the most masculine mechanisms of accumulation. In the cases investigated, migration is, in fact, a central process, even if not always successfully supportive of social ascent. As we will see, migrations tend to facilitate escape from stagnant economic contexts, but success highly depends on the accumulation achieved and its relation with other life course events and structural factors.

In sum, only with difficulty could a singular event, or a static class position taken at a given time, account for the complex mechanisms underlying intergenerational processes of social mobility. To fully understand individuals' and generations' class positions and trajectories we must look at the equation between advantageous and disadvantageous life course events, examining its differential cumulative affects which, in the context of different structural opportunities, produce patterns of class mobility.

## 6 Intergenerational trajectories and life course events

The longitudinal analysis of class positions and of the chains of positive and negative life course events occurring in each generation and across them enabled us to identify three main patterns of educational and class mobility (Table 2)<sup>3</sup>: trajectories of loss of accumulation, low accumulation and continuous accumulation.

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3 The numbers in table 2, pertaining to the life course events classified as advantageous or disadvantageous, match those assigned in table 1.



Table 2: Lineages' social trajectories and cumulative life course advantages/disadvantages

Lineages	Origin		Generation 1		Generation 2		Generation 3	
	Men	Women	Men	Women	Men	Women	Men	Women
Loss of accumulation								
Lineage 1 - Male, Lisbon								
Educational level	Primary	Primary incom-plete	Primary incom-plete	Primary incom-plete	Secondary	Basic	Secondary in-complete	
Class Trajectory	LQE→CE →TIE	LQE → SE	NQIW → QIW →SB → QIW	LQE	LQE → QIW → SB →LQE →QIW	CE	LQE	
Life Course Events	Disadvantages		7+10+19		9+10+19		7+9	
Advantages			11+20+21		8			
Lineage 2 - Female, Lisbon								
Educational level	Illiterate	Illiterate	Primary incom-plete	Primary incom-plete	Secondary	Basic	Secondary	Secondary
Class Trajectory		LQE	NQIW→QIW	LQE→NQIW	CE	LQE→CE	CE	LQE
Life Course Events	Disadvantages		3+4+9				7+9+14+19	
Advantages			17+20		5+12+17+20			
Low accumulation								
Lineage 3 - Female, Mondim, work-oriented, local closure								
Educational level	Illiterate	Illiterate	Primary incom-plete	Illiterate	Basic incom-plete	Primary	Basic incom-plete	Secondary
Class Trajectory	SE	SE	AW → SE →LQE → SB	AW	LQE → CE	LQE → NQIW	NQIW	LQE → CE
Life Course Events	Disadvantages		4			5		9
Advantages			20+21			20		20

continuation of table 2

Lineages	Origin	Generation 1		Generation 2		Generation 3	
	Men	Women	Men	Women	Men	Women	
Lineage 4 - Female, Lisbon, irregular trajectories							
Educational level	Primary incom-plete	Primary incom-plete	Primary	Illiterate	Basic	Primary	Secondary
Class Trajectory		SE → AW	AW → NQIW → CE	AW → LQE	(QIW → TIE) → LQE → SB	LQE → NQIW → LQE → TIE	LQE → CE → TIE
Life Course Events	Disadvantages		2+3+4+9		1+5+9+14+15+19		3+7+13+14+19
Advantages			17		12		20
Lineage 5 - Female, Mondim, health problems							
Educational level	Illiterate	Illiterate	Illiterate	Primary incom-plete	Primary	Primary	Secondary
Class Trajectory	AW/SE	AW/SE	AW/SE	AW/SE	NQIW	AW → LQE	CE
Life Course Events	Disadvantages		4+9+15+18			1	1+9+13
Advantages						21	21
Continuous accumulation							

**Lineage 6 - Female, Lisbon, effects of female autonomization**

Educational level	Primary incom-plete	Illiterate	Primary	Primary	Post-Graduation	Univ. student
Class Trajectory	SB		NQIW → QIW → CE	AW → LQE → NQIW → SB	CE → TIE → ISO	Univ. student
Life Course Events	Disadvantages		5+9+13		14	
Advantages			17+21		8+12+20	6

table 2 continues on the next page

continuation of table 2

Lineages	Origin	Generation 1		Generation 2		Generation 3	
	Men	Women	Men	Women	Men	Women	
<b>Lineage 7 - Female, Lisbon, effects of marriage</b>							
Educational level	Illiterate	Illiterate			Post-Graduation		Post-Graduation
Class Trajectory	NQIW	AW	Primary incom- plete AW → NQIW → QIW	Illiterate AW → LQE	CE → TIE → ISO	CE → TIE → ISO	ISO
Life Course			4+2				
Events	Disadvantages		16+21		6+8+16+17+20+21		6+8+11
<b>Lineage 8 - Female, Lisbon, effects of marriage</b>							
Educational level	Illiterate	Illiterate	Primary	Illiterate	Superior	Superior	Univ. student
Class Trajectory	AW → NQIW	AW → LQE	QIW	LQE	ISO → EM	LQE → CE → TIE → ISO → EM	Univ. student
Life Course							
Events	Disadvantages		2+3+4				
	Advantages		12+17+21		6+8+12+16+20		6
<b>Lineage 9 - Male, Lisbon, cumulative effects of socialization</b>							
Educational level	Primary	Illiterate	Primary	Primary	Basic	Basic	Post-Graduation
Class Trajectory	QIW		NQIW → QIW	NQIW	CE → SB → TIE	CE	Post-Graduation
Life Course							ISO
Events	Disadvantages		3+9				
	Advantages		5+17+20+21		5+20		6

## 6.1 Loss of accumulation

The loss of accumulation pattern concerns trajectories where ascending processes occurred in intergenerational history, but where there was no capability to maintain those previously accumulated resources in face of structural reconfigurations. Resources, economic or educational, were not transmissible from one generation to the next. Even if some advantageous life course events occurred, the amount of cumulative disadvantages ended up by outnumbering them. Causal processes underlying intergenerational losses may be of different sorts, but share a common feature. Social ascent results mainly from choices that take advantage of historical structural opportunities, but fail to convert contextual accumulation into more permanent and transposable capitals, either because economic or educational resources were not reproduced or further enhanced, or because intergenerational socialization models were not transformed by contextual social ascent.

A paradigmatic example is the case of lineage 1, in which severe loss of some accumulation processes were found between the first and second generations. Grandfather (76, 4<sup>th</sup> grade, married), born in Lisbon, was the son of a military (sergeant at the end of career), who left home to live with another woman when he was still a child, and of a small vegetable seller who had him raised by his maternal grandmother. His childhood and teens were marked by anomic and unstable socialization (without parental regulation), which led him to reproduce his mother's anomic experimentalism (succession of love affairs, drinking and gambling; he had a daughter at 15 from a prostitute), while working as an unqualified industrial worker (car mechanic apprentice) since age 14. The discovery of boxing at 15 eventually changed his life, leading to open and positive experimentalism: he travelled (Europe, United-States, Portuguese colonies) and met people from different social circles, while slowly embodying the ethics and discipline of sportsmanship. In 1957, already married to a seamstress coming from a poor labour class background, he decided to migrate to Angola where he eventually became a qualified industrial worker and started a succession of small family businesses with some success, taking advantage of historical opportunities created by the strengthening of Portuguese investments in African possessions in the 1950s and 1960s. He was then able to put his oldest son through high-school and even send him to university in Portugal. At that time, the Portuguese empire disintegrated due to the revolution of 1974 and the independence of African colonies. The grandfather lost everything, fled Angola, tried Rhodesia and South Africa without success. In 1977 he returned to Portugal, where his son had already dropped out of university due to financial difficulties and to the fact that he already had a daughter, born out of wedlock, to support.

The son (52, 12<sup>th</sup> grade, married) had a positive school experience in Angola when the family was in the upturn, but not so in Portugal. He tried, together with his father, to replicate the same businesses they had in colonial times. They failed repeatedly. The socio-economic conditions of the late 1970s and early 1980s in

Portugal were particularly harsh and distant from the privileges of Portuguese settlers in Angola. Repeated failure led them back to industrial work. After several low qualified jobs, the son ended up in construction work and the father employed as a car mechanic.

The son also had a son with his present wife, a salesclerk with the 9<sup>th</sup> grade and a working class origin. The grandson (19, 11<sup>th</sup> grade, single) in this lineage works part-time in a warehouse and tries, with difficulty, to finish high-school. Unlike his father, who was, although failing at the end, raised for upwards educational mobility, he always lacked paternal guidance. The trauma of loss prevented his father from even projecting a better future. As he disheartedly says: "I just want my son to finish the 12<sup>th</sup> grade". Thus, the grandson is unable to even picture his future. The advantageous life course events were not enough to produce the ability to adjust in new structural realities. In this case, the downfall of the Portuguese empire was the historical turning-point that dampened the social ascent.

In other lineages different structural conditions are present. In lineage 2 the resources accumulated through hard work in good job conditions in the first (the expansion of heavy industry in the 1950s and 1960s) and second generations (the expansion of public administration jobs in the 1970s) produced a work ethos which was not transmitted to the third generation, by then faced with a more competitive and closed labour market. The cumulative advantages in the second generation were replaced by a succession of negative events in the third. The 27 year old granddaughter, who started working at 17 after a bad school career, had an instable trajectory marked by low paid jobs with frequent unemployment and conjugal instability and break ups. She had the illusion that financial independence was easy at the beginning of her professional trajectory, but now she refers to herself as being "lost as always".

## 6.2 Low accumulation

Low accumulation patterns reveal the permanence of disadvantageous factors across generations, even if a few advantages occurred. These are not linear processes of stationary social mobility. Changes did arise and the overall social position of later generations is better than previous ones, as generally occurs (Biblarz et al., 1996). However, these are cases where the relative absence of cumulative positive events (those which take place are marked by singularity and weak transformative effects) makes it difficult for individuals to go beyond and above the mere reconfiguration of the socio-professional structure. Furthermore, rather than formulating strategic choices and projects, individuals are often "pulled up" by interventions which are not linked to the dynamics of individual life courses, but seem to depend on network support.

Lineage 3 is characterized by relatively stagnant intergenerational trajectories. Grandmother (83, illiterate, widow), an agricultural worker daughter to destitute

sardine peddlers, married another agricultural worker chosen by her parents. After working with them, in the late 1950s he emigrated alone to France for a period of 15 years, where he worked as a low qualified gardener. Upon his return, he was able to buy a small grocery in the village where the family always lived in. Of the second generation couple's eight children most emigrated, but one of the daughters (49, 4<sup>th</sup> grade, married, 2 daughters of 22 and 24) stayed behind and worked in the grocery since age 15 until her early thirties, when her father sold it to buy a small plot of land to work in with his wife in their old age. The daughter, who at 22 married a low-rank policeman, went on to work as a seamstress and ended up as an unqualified textile worker. In a way, the business built up in the first generation did not produce more advantages than those already expected in the structural conditions they lived in. She did not study further than primary school, nor did she ever imagine other work possibilities. As she says: "I did not imagine anything". To the same question her oldest daughter (24, 12<sup>th</sup> grade, single) gives a quite similar answer: "I do not have any expectations for the future, I just want to have work". She completed high-school, following the mainstream pathway of her generation, which benefited from the expansion of the educational system in Portugal. Despite a bad school experience and several flunks, she stayed in school because there were no other opportunities in the local employment market. She even thought of emigrating to Luxembourg, but an unexpected job opportunity appeared, low paid and without great progression chances, but stable. The local state elected official, an acquaintance of her mother who wanted her to stay at home, found her a job as a helper at the village's nursing home and later as a probationary clerical worker. She dates an apprentice construction worker with the 8<sup>th</sup> grade who also lives nearby. Local networks have a double role in the granddaughter's life. Connections have enabled her to found a service's job in the scarce employment conditions of rural villages. On the other hand, she gave up her migration project in favour of the low paid stability offered by the local closed network.

A more irregular and less stagnant example can be found in lineage 4, which is marked by the high number of disadvantageous life course events. The grandmother (72, illiterate, widow), after her father's death and her mother's remarriage to a violent man who squandered their resources, went to work as an agricultural worker at 11, moved out of the house, helped by her older brothers, at 13, and married an unqualified industrial worker at 17. After marriage, she remained a low qualified seamstress all her life, in the company where her husband worked. He, with the 4<sup>th</sup> grade, progressed a bit more and became a sales-clerk at the end. They were extremely poor and lived in a small room with their two children for many years. Her daughter (52, 4<sup>th</sup> grade, widow) started working at 12 to learn tailoring. Until her twenties she had several jobs as seamstress, factory worker, domestic cleaner, etc. She married at 21 with a man professionally better-off (an electronic technician), but the marriage lacked cohesion (he was violent, had affairs and kept the money for



himself; she had to be the main breadwinner and carer) and resulted in a turbulent and definitive separation. At 37 she became partner of a small business, but it failed due to her lack of skills and depressive crisis, and she became unemployed. She now works in a very small typography owned by relatives, where she earns less than she did in the 1990s. Her daughter (25, 12<sup>th</sup> grade, cohabiting) suffered from an anomic socialization which led her to indecision regarding her educational future (though she finished high-school) and to high job instability (started at 14 working in night-clubs). After some conjugal experiences, she married an industrial worker with basic education. The conjugality below her condition and her personal instability did not provide for many future prospects. But, as in the previous case, network support is deeply related to unexpected improvements. Her sister, who had married above with a senior pilot in the state aviation company, offered her the same opportunity she had had to become airhostess.

These lineages show us two main processes of low accumulation. One is of relative stagnation and local closure with no lasting positive effects along the life course. The other is of disruptive irregularity and strong accumulation of negative life events. The only positive factor that prevents social downgrading is the existence of some social capital, which triggers the few advantageous life course events present in these lineages.

### 6.3 Continuous accumulation

A third pattern is that of continuous accumulation which surpasses structural movements of educational and professional change. The later generations' social position is immensely more privileged than that of the earlier ones. Strong accumulation of resources and the bettering of educational and socio-professional positions is the result of a succession of positive events which started in the first generation and produced an intergenerational chain of multiple advantageous effects. In most of these lineages, negative events can only be found in the first generation, and the overall effect of such advantage produces strategic intergenerational dynamics guided, often reflexively, towards upwards mobility. These continuous accumulation processes may, of course, be the result of different arrangements of advantageous events. Nonetheless, they generally combine many areas of the life course: from socialization to educational experiences, from work and migration to conjugal choices and dynamics.

Our first example emphasises the cumulative effects of female autonomization. Lineage 6 reports some irregularities along the lineage's trajectory, but the congregation of several positive events compensated for the negative ones, which enabled these women to take advantage of increased gender equality in Portuguese society over the last few decades. The grandmother (67, 4<sup>th</sup> grade, separated), who

at present owns a small clothes shop, migrated to Lisbon with her husband at 21, escaping from a closed rural environment. Her father had forced her to drop school to help her mother at home, while he worked in the small family bakery. As she remembers: “father thought that if the girls went to the city and studied they would be lost”. Her desire to escape led her to marry a man below her social condition, which increased financial difficulties, but allowed for migration. Although she was educated to be a housewife, she started working as a seamstress at 26. She describes her work as a means not only to survive but also to gain autonomy. This happened in 1966 when women entered massively in the labour market to compensate for the lack of men.<sup>4</sup> She worked either as an industrial worker or low qualified employee for more than three decades, while her husband progressed from machine operator to machine seller. A few years ago she and her husband separated and she decided to invest, helped by her only daughter, in the small business. The daughter (44, post-graduate, remarried) interrupted her schooling trajectory at 17, and went to work as a clerk, but returned to university at 30 moved by a strong will for professional success and higher income. At that time, she had already divorced the father of her two daughters, who is still a clerk. It was the disappointment with marital life that drove her to invest professionally, an area where she felt her efforts were rewarded. She, then, remarried a man with a higher socio-professional profile, but, as she eventually finished university and went on to a post-graduation, they drew apart culturally and divorced. After that, she had several conjugal relationships. At present, she lives with a top engineer, owner of his own high-tech company, and has recently moved to an upper-middle class neighborhood. This sequence of conjugal breakdowns, which affected contextually her standard of living, was compensated both by the fact that she always remarried above her previous marital choices, and the fact that she always counted on the support of her mother, who not only helped her financially and by taking care of the children, but also encouraged her to be an independent and successful woman. The third generation is at university. The oldest daughter (21, single) explicitly says that she wants “to be like her mother” and achieve the goals she was educated for: personal autonomy, educational success and a strong career for economic independence.

Marital choices and conjugal dynamics seem to play a central role in mobility processes. In lineages 7 and 8 conjugality plays this key role, either because women marry above their origin or because there is a strong conjugal cohesion towards upper social mobility. In lineage 7 it is mainly the conjugal joint-venture for professional and educational success that explains the intergenerational social ascent. The quite homogamic second generation couple, both issuing from a poor manual work background, gathered efforts and studied side-by-side while simultaneous working, so

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4 In the 1960s a high number of men were in Africa due to the Colonial War (1961–1974), while others were migrating also in high numbers to richer European countries.

as to improve their socio-professional standing, which they did. Their daughter is already a post-graduate professional.

In lineage 8, one of the poorest at the beginning, both factors are tied together, amongst other advantageous life events. The grandmother (66, illiterate, married) was born in an excluded family and put to work, only for shelter and food, as a domestic servant at age 6, losing all contact with her parents and siblings. At 13 her estranged mother came to collect her so that she could help support the family during the father's illness. Even though she felt extremely angry towards her parents (she said: "I had no mother, my true mother was my Mistress!"), she then came to Lisbon where her parents already were and was again employed as a resident house servant. At 17, she started living with her spouse (32 at that time, 4<sup>th</sup> grade) for financial reasons. She did not like him at first, but he had a good job as a specialized factory worker and was a good catch according to her mother. She stopped working because her husband was very jealous and was well-off enough to provide for the family. Even so, he migrated to Mozambique during 1973–74 to earn more money.

Along her fertility career she did four abortions, because she did not want her children to live in the same poverty she had suffered as a child. As a result, she had a strong educational project for her youngest daughter (the oldest daughter is severely handicapped). In this case, initial hardship produced a reflexive monitoring of mobility projects, similar to those seen by Elder (1974). Overall, there was a great conjugal solidarity, which allowed for the second generation to have a better schooling trajectory. The daughter (43, university degree, married) interrupted school after secondary education, but continued later on and finished university after marriage. She studied while working as a clerk and later on as a supervisor in a multi-national enterprise. The job, obtained through her husband, enabled her to contact people with higher education and for that reason she went through a re-socialization process guided towards professional achievement. At present, she has an important directive function in a market studies company. Her re-socialization was also the result of her marriage at 22, with an ambitious man who accomplished a high position in the military career (he is now military-attaché in a former Portuguese colony) and encouraged her educational strategy. The couple's family and mobility project is so strong that even if they have had serious relationship problems they remained together. Due to a succession of well chosen decisions, the third generation (daughter, 18, and son, 16) was born in much better conditions. The daughter, already attending university, has a profile oriented towards professional and financial success in a top managerial position.

In our last case, lineage 9, the crucial effect of socialization for work in the first generation, while combined with other advantageous processes, such as successful migrations and good job experiences, produced clear progress in the second generation and culminated in a strong educational orientation in the third. In this male lineage the transmission of a work ethos started with the transformative life

course events of the grandfather (79, 4<sup>th</sup> grade, married), born and raised in a very poor milieu by his widow mother. His father was a carpenter who took his family to Lisbon and died when he was seven. At 12, he had to start working as a factory worker, delivering all the money to his mother. Still working in the same factory, he married a co-worker at age 22, with whom he had his only son. Their scarce resources pushed him to migrate, leaving his family behind, to the Portuguese colony of Mozambique and afterwards to Brazil. During this period he worked for big industrial companies, where he became a highly specialized industrial worker (with training in Germany, Switzerland and France), activity he continued when he came back to Portugal. He tried to give his son a better education, but only what he thought to be enough at the time (the 1970s) to find a job in the services' sector.

His son (53, 9<sup>th</sup> grade, married) worked for several years as a clerk employed in a small travel agency and ended up by buying it together with some co-workers. This small business, a major turning point in his life, was later absorbed by a multinational, which continued to employ him in an intermediate managerial position, allowing for more stable revenues which enabled his spouse to become a housewife and the couple and their two sons to move to a better neighborhood. His oldest son (33, post-graduate, cohabiting) was raised for school success under strong parental control and regulation of daily activities. In the pursuit of a career (he, as his partner, has now a privileged position as high-school teacher in the public education system), the son emphasizes the hardworking father figure as his role model in life. These are also the values he wants to transmit to his two year old daughter.

## 7 Discussion and conclusions

In-depth biographical analysis of family lineages with similar low social starting points enabled us to reconstitute detailed individual, family and intergenerational trajectories – in terms of social positions and chains of life course events in their specific generational historical contexts.

Loss of accumulation results from the inability to reconvert or maintain the capitals that specific structural opportunities permitted to accumulate, when these changed. Some few positive life events were not enough to maintain intergenerational ascent. Disadvantageous life events in a diversity of areas and in most generations ultimately caused the loss of previous gains. In low accumulation trajectories, negative life events also predominate. Individuals and families mainly adjusted to shifts in structural conditions, without being able to accumulate more resources than the previous generations, except for the intervention of support networks that enabled small gains. Continuous accumulation, on the contrary, relates to trajectories marked by a chain of positive life events across the generations, which allowed individuals to produce larger gains. Here, structural opportunities were

seized with the impetus of reflexive action. Agency is primordial to understand the upwards mobility of these lineages.

Although our qualitative analysis has a limited empirical scope, since it does not cover social diversity in a representative manner, it allowed for more than simply reconstituting family histories. The purpose was not simply to construct a typology of intergenerational mobility trajectories, but to put forward and test a theoretical hypothesis, that of a life course event “ratio”. Intergenerational mobility can be seen as the result of a specific ratio between positive and negative life course events that takes into account the total sum of events (Mitchell, 2003) within and across generations. Social mobility is, then, the overall result of the global interplay between advantageous and disadvantageous effects of life course events, which produces significant divergences, differential and cumulative, in the types of resource accumulation.

Firstly, it is clear that the effects of these events can only be evaluated through their reciprocal connections – in the balance between advantages and disadvantages, whose differential and cumulative effects go beyond individual lifetimes and are better revealed with an intergenerational analysis of linked lives, one of the key principles of life course theory (Elder et al., 2003, 13). Intergenerational relations are not static, but characterized by continuous fluxes of exchange.<sup>5</sup>

Secondly, these (dis)advantages will be the more effective the more they are diversified, that is to say, the more they encompass different areas of one’s life. This implies complexifying those perspectives centred either on static transmission of specific and isolated initial (dis)advantages or on linear and partial sequences of the life course. It is not enough to reconstitute childhood or work experiences, for instance, to understand the complex intertwining of negatives and positives. We need to look not only at the overall biographies (individual, family, lineages), as DiPrete and Eirich (2006) have also pointed out, but also to look at all their different areas using a life-span development analysis (Bengston, Biblarz and Roberts, 2002).

Thirdly, it is important to identify the life course events that help produce transposable capitals and dispositions into new structural contexts and younger generations, if we want to understand the logics of continuous accumulation present in upwards mobility (or its absence in other accumulation processes).

On the one hand, the structure of resources accumulated is of great importance to understand different strategies of resilience to negative life course events. Social capital has revealed to be of great value to prevent downfalls when accumulation is weak or when disruption occurs (Widmer, Kellerhals & Levy, 2004). It has also shown to be important in supporting continuous accumulation. The relationship between life courses’ cumulative effects and capitals is imbricated. Some life course events, such as migration, may disrupt some capitals, such as local networks, at

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5 As the research on family support has greatly proven (Coenen-Huther et al, 1994; Attias-Donfut, 1995).



the same time creating opportunities for producing other resources. Failure seems linked to disruptive events (historical, familial and individual) that break the earlier conditions but also weaken supporting resources, such as social capital. The low accumulation trajectories, when compared to loss of accumulation, show us the effects of this interconnected disruption. Overall, the pre-existing volumes of capital (and their structure) mediate the impact of life course events on social mobility. But those resources are also, diachronically, a result of these events as far as they produce perennial and transposable (re)configurations of conditions and dispositions for capital accumulation. Life course events permanently produce reconfigurations of socialization and conditions for capital accumulation. These events will produce lasting effects if they are strong enough, by their intensity and number, to generate lasting reconfigurations, individually and even more so inter-generationally.

On the other hand, agency is also a decisive element to consider. In face of similar structural opportunities and constraints, differential outcomes are produced also because individuals have the ability to make choices, to engage in planful action (Elder, 1974). Spenner and Fatherman, (1978) had already stressed the importance of goals in life course dynamics. In our analysis, those who have accumulated more resources are also those who plan the future, who have a “goal-directed life” (Buhler and Massarik, 1968)

Finally, this perspective on the impact of life course events on social mobility may help us understand not only the divergence of individual and families’ trajectories, but also some of the processes of macro-social class inequality, given that the likelihood of specific events and their respective impact on mobility may not be the same in all social classes, depending on previous cumulative (dis)advantages and specific historical opportunities. The more an event is accompanied by others with the same effect the more it will be effective. An accumulation of positive events prevents strong impacts by negative ones and vice versa. The accumulation of positive events enables disconnections between contextual circumstances and accumulation processes, thus permitting easier transpositions of capitals to new circumstances. One must see the choices people make and the events they experience given specific structural opportunities (that simultaneously limit but also permit ranges of possible action). Life course events and choices permanently affect, restricting or enlarging possibilities, the position people have within their structural contexts. Life course events are always produced in the intertwining of structure and agency, as the result of relational individual action in the context of institutionalized structural opportunities.



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