

# Welfare states and social inequality: Key issues in contemporary cross-national research on social stratification and mobility

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## Abstract

Research on welfare states and research on social stratification and mobility share a common concern for social inequality. Research on welfare states is usually comparatively designed, looking for similarities and variation across countries in a number of aspects related to social structure and social institutions. On the other hand, the basic model of social stratification, utilized in most cross-national research on social stratification and mobility, is an abstract model which does not specify why and how we are to understand cross-national differences. Yet for about 20 years or so, researchers within the social stratification community have undertaken several cross-national studies. This paper reviews a few selected studies within each area and summarizes their conclusions with regard to similarities versus differences between countries. In the final section of the paper, I discuss key issues for future work within cross-national research on social stratification.

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## 1. Introduction

Two areas within sociology particularly address social inequality across countries: research on welfare states and cross-national research on social stratification. The two research traditions ask somewhat different questions about social inequality, yet both schools of thought analyze some of the most pertinent issues in modern societies. Here are some examples: To what degree are societies able to provide individuals with equal opportunities? Does family background have an impact on individuals' educational attainment and their positions in the labor market? What impact does the welfare state have on people's choices and behavior?

Research on welfare states is usually comparatively designed, looking for similarities and variation across

countries in a number of aspects related to social organization and social inequalities. Welfare state research therefore has a clear notion of cross-national differences in social structure and social institutions. On the other hand, the basic model of social stratification, utilized in most cross-national research on social stratification and mobility, is an abstract model which does not specify why and how we are to understand cross-national differences. Yet for about 20 years or so, researchers within the social stratification<sup>1</sup> community have undertaken several cross-national studies.

Thus, research on welfare states and cross-national research on social stratification share a common con-

<sup>1</sup> I will use the term social stratification as a common term for research within different traditions, such as social attainment (related to socio-economic status or social prestige) and class analysis (related to various definitions of social class).

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cern for cross-national variation in social inequality, yet perhaps surprisingly, the two research communities have only to a limited degree fertilized each other. This essay will review a selection of previous studies to discuss what we have learned, and where we should go. Since it is beyond any single paper to summarize and discuss two large areas of research, two limitations should be mentioned here: first, a majority of the authors presenting papers in this volume, including myself, are primarily engaged in social stratification research; thus, we will not be able to do justice to the whole range of welfare state research to the same extent as we try to cover research on social stratification. Second, even given this limitation, there are a number of topics within recent research on social stratification and social inequality that will not be discussed here,<sup>2</sup> simply because this would be beyond the scope of these papers. We share a concern about the importance of communication between stratification researchers and welfare state researchers, and although it is too ambitious to think that we would be able to integrate two research traditions in this volume, we hope these papers can serve as an inspiration for others to try to do so. The last paper included in this volume, written by Eric Tranby, will begin this task by discussing our papers in light of recent welfare state research. Thus, my introduction will address more general issues related to the overall topic, whereas Tranby will discuss the papers of this volume more specifically.

This introductory paper is divided into two parts. The first part is mainly descriptive, giving a brief overview of the most influential theory within welfare state research the last decade, and the basic model of social stratification, before summarizing a selection of cross-national research projects on social stratification, focusing in particular, on studies of social mobility. Have these studies documented important insights into cross-national similarities, have they discovered national-specific differences between countries, or both? Readers familiar with this literature might go directly to the second and more analytical part, where I suggest key issues for future research, such as developing a better understanding of the distinction of fundamental causal forces versus secondary effects, of social mechanisms, and of the labor market. As will become obvious, I have been very selective, concentrating only on a limited number of books (rather than articles), and even given this limitation I have not been able to give a comprehensive account of each research project, rather I address only specific issues

<sup>2</sup> Such as, for instance, gender inequality and ethnic inequality in the labor market.

within each project I find of interest given the focus here on welfare states and social inequality.<sup>3</sup>

## 2. Research on welfare states

If we are to mention only one name within current welfare state research, Gøsta Esping-Andersen is an obvious candidate.<sup>4</sup> His work, in particular, his book on the three worlds of welfare capitalism, has been extremely influential. His point of departure was grounded in previous theories, formulated “. . . in terms of the logic of capitalism, industrialism, modernization, or nation-building” (Esping-Andersen, 1990, p. 3). These theories were nearly always expecting different welfare states to converge over time, that is, they expected similar and convergent evolutionary paths across welfare states.<sup>5</sup> This expectation is without empirical support, argues Esping-Andersen, since the welfare states differ from each other in important aspects, thus the title of his seminal work.

### 2.1. *The three worlds of welfare capitalism*

Esping-Andersen argues in favor of conducting empirical cross-national research, since “. . . only comparative empirical research will adequately disclose the fundamental properties that unite and divide modern welfare states” (Esping-Andersen, 1990, pp. 2–3). He finds that welfare states differ from each other in important aspects, and these differences are, for historical reasons, too fundamental to sustain an expectation of convergence:

<sup>3</sup> Summarizing different projects in a stringent manner is always a challenge, since the authors often define concepts slightly different, etc. I have decided to stay as close to their original language as possible, thereby running the risk of not providing an overall constancy in terms of my own language. Also, I quote the authors more than usual, again in order to let us hear their own voice.

<sup>4</sup> There are a number of important approaches to welfare states associated with, to mention a few, Marshall (1975), Titmus (1976), Flora (1986), Gallie (2000), Kuhnle (Ed.) (2000) and Huber and Stephens (2001). Walter Korpi's book on the *Democratic Class Struggle* (Korpi, 1983) has been important, as has studies on women's new situation within welfare states, see for instance Hernes (1987), Leira (1992) and Orloff (2002). Not surprising, perhaps, welfare state research has a strong standing in Northern Europe, in particular Scandinavia, which probably is due to a substantial amount of commissioned research for the Ministries in these countries.

<sup>5</sup> I will use the concepts theory of industrialism, theory of modernization and liberal theory interchangeably, since they all predict a convergence between countries. See also Erikson and Goldthorpe (1992).

“As we survey international variations in social rights and welfare-state stratification, we find qualitatively different arrangements between state, market and the family. The welfare-state variations we find are therefore not linearly distributed, but clustered by regime types” (Esping-Andersen, 1990, p. 26).

Thus, while refuting theories of convergence, Esping-Andersen argues that some countries resemble each other, and he identifies three regimes of welfare states: a cluster of ‘liberal’ welfare states (such as United States, Canada and Australia), a cluster of ‘corporatist’ welfare states (such as Germany, Austria and Italy), and a cluster of ‘social-democratic’ welfare states (such as the Scandinavian countries). The clusters are ‘ideal types’, i.e. there is no single pure case. Yet, if we define welfare states with regard to the quality of social rights, social stratification, and the relationship between state, market and family, then cross-national empirical research reveals distinct regime-clusters (Esping-Andersen, 1990, p. 29).

Esping-Andersen includes the existence of social stratification within societies as part of his definition of a welfare state. The labor markets are embedded in an institutional framework, and there are important cross-national differences in these institutions, related to social policy, the distribution of working rights, the evolution of employment, etc. The welfare state is also, in its own right, a system of stratification (in many countries the public sector employs a large share of the labor force), in addition to the fact that the state as an institution (to a varying degree) is responsible for economic redistribution and social insurance systems (pensions, etc.), thereby possibly reducing social and economic inequalities among the citizens, in particular, by helping the poor.

States differ in terms of the extent of redistribution and degree of coverage of the citizens, as well as the size and tasks performed by the public sector. In order to explain the historical trajectories of different welfare states Esping-Andersen describe the history of class relations and politics: the pattern of working-class mobilization and political organization varies across countries; the same does political coalition-building within the national parliaments. Each country has a history of past reforms, which has institutionalized rights granted and the support given.

A vital question which differentiate welfare states is whether these reforms comprise the middle-class or not, since “middle-class welfare states, be they social democratic (as in Scandinavia) or corporatist (as in Germany), forge middle-class loyalties” (Esping-Andersen, 1990, p. 33). Korpi and Palme (1998) have developed this

argument further, by analyzing institutional differences between welfare states and their outcomes, showing that “The more we target benefits at the poor and the more concerned we are with creating equality via equal public transfers to all, the less likely we are to reduce poverty and inequality” (Korpi & Palme, 1998, p. 661). This apparent paradox is related to the important role of the middle-class in modern welfare states: if they do not see any personal gains from their tax money, their support for the welfare systems is likely to deteriorate, resulting in a minimalist type of welfare state with targeted programs for low-income groups only. If the welfare states also can be important as a social insurance institution for the middle-class, this class is more likely to supply larger budgets for the state to redistribute. Thus, the class-profile of the welfare state arrangements is central; a welfare state that also provides benefits for the middle-class gives fewer incentives for this class to seek market-based insurances and is more likely to have the political and economic support of this social class (Korpi & Palme, 1998).<sup>6</sup>

The typology developed by Esping-Andersen has been widely used, as well as criticized; in particular, from researchers arguing that the model does not include an elaborate understanding of the role of the family institution in modern societies and does not integrate women in a proper way. Esping-Andersen uses the concept of *de-commodification* to describe social rights that allows workers to maintain a livelihood independent of the market (Esping-Andersen, 1990, pp. 21–22). In order for the concept to make sense, one must presume a commodification of labor in the first hand. This is often not the case for women, who may work without pay outside the market. Later, Esping-Andersen has discussed the possibility of adding a new model to his typology, but argues that for most purposes the three original models will be sufficient.<sup>7</sup>

Thus, whereas most earlier research on welfare states was influenced by a thesis on convergence, later research seems more in favor of classifying welfare states as

<sup>6</sup> Korpi and Palme classify welfare states according to whether they provide universal benefits or target their expenditure towards specific groups (low-income groups), as well as whether they provide equal benefits for all or introduce earnings-related benefits. These dimensions give rise to a slightly different classification of welfare states than Esping-Andersen’s. Korpi and Palme distinguish between targeted welfare states; voluntary state subsidized; corporatist welfare states; basic security welfare states, and finally, encompassing welfare states (Korpi & Palme, 1998).

<sup>7</sup> However, he argues, the Mediterranean and the Japanese welfare models are also *familialistic*, which has consequences for both welfare and employment (Esping-Andersen, 1999, p. 12).

belonging to groups of states that in some vital aspects are distinctly similar to each other, yet different from the other groups. The typology of Esping-Andersen has been influential, and we will later see if – and how much – it has been utilized in cross-national research on social stratification and inequality. Let us first begin by exploring the basic model of stratification.

### 3. A basic model of social stratification

In 1927, Sorokin argued we need to understand the “... vertical circulation of individuals (which) is going on permanently” in societies (Sorokin, 1927, 414, referred in Blau & Duncan, 1967, p. 2). In an open society children with different social origins would have similar opportunities to achieve the best positions in society. Conversely, a more closed society would offer fewer opportunities for children with disadvantaged family backgrounds. The basic model of the process of stratification advocated by Blau and Duncan (1967) compared the occupational status of two generations, in order to explore the openness of the society. The occupational status of the father is argued to have an influence on the occupational status of the respondent (they only focused on sons). This association is decomposed into two parts: a direct effect of father’s occupation on respondent’s occupation, and an indirect effect of father’s occupation via respondent’s educational attainment on respondent’s occupation. The model also included an association (correlation) between father’s education and his occupational status, as well as an effect of father’s education on respondent’s education. In addition, the model distinguished between the first job of the respondent, and the present occupational status (the data were collected in 1962).<sup>8</sup> The strength of association between father’s and son’s occupation can be taken as an indicator of how open the society is. The basic model of social stratification is illustrated in Fig. 1.<sup>9</sup>

The early analyses of status attainment measured occupational status as a continuous variable, and utilized a special version of ordinary regression analyses (path-

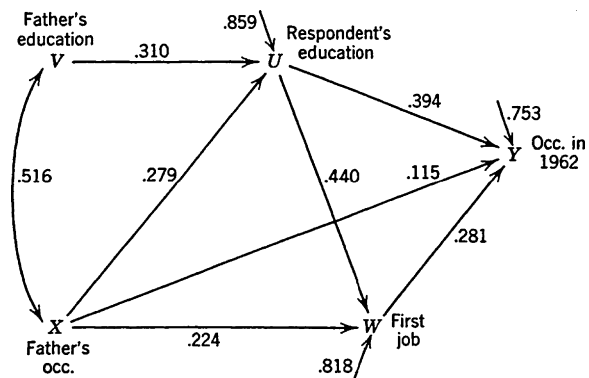


Fig. 1. The basic model of social stratification (Blau & Duncan, 1967, Fig. 5.1).

analysis).<sup>10</sup> Most of these studies were country specific, i.e. they analyzed one and one country at a time (in particular, the US), and they did therefore not discuss the impact of cross-national variation on the patterns and strengths of associations related to the status attainment process. The model of stratification is a theoretical model in the sense that it makes no reference to context; that is, to the impact of time and space. Blau and Duncan discuss the possibilities of utilizing the model across different populations:

“The form of the model itself, but most particularly the numerical estimates accompanying it, are submitted as valid only for the population under study. No claim is made that an equally cogent account of the process of stratification in another society could be rendered in terms of this scheme. For other populations, or even subpopulations within the United States, the magnitudes would almost certainly be different, although we have some basis for supposing them to have been fairly constant over the last few decades in this country” (Blau & Duncan, 1967, p. 177).

Despite their reservations, their basic model of stratification invites comparisons across time and space. In order for this approach to be utilized in cross-national analysis, one would need a common classification

<sup>8</sup> The model also includes, for each dependent variable, an estimate of residuals, “... standing for all other influences on the variable in question, including causes not recognized or measured, errors of measurement, and departures of the true relationships from additivity and linearity, properties that are assumed throughout the analysis” (Blau & Duncan, 1967, p. 171).

<sup>9</sup> I do not intend to go into detail with regard to the data used in various studies, but I cannot resist the temptation to mention that the sample for this study comprised 20,700 men.

<sup>10</sup> Given the later critique of their work it is worth noting the authors’ argument with regard to their methodology: “The technique of path-analysis is not a method for discovering causal laws but a procedure for giving a quantitative interpretation to the manifestations of a known or assumed causal system as it operates in a particular population. When the same interpretive structure is appropriate for two or more populations there is something to be learned by comparing their respective path coefficients and correlation patterns. We have not yet reached the stage at which such a comparative study of stratification systems is feasible” (Blau & Duncan, 1967, p. 177).

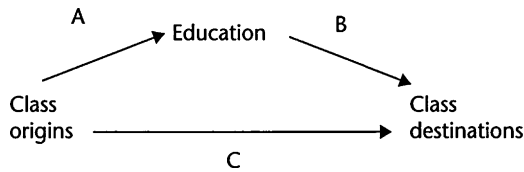


Fig. 2. The Origin–Education–Destination model (Breen, 2006).

scheme of occupational status. In the next paragraph I will briefly discuss an early cross-national study which had the ambitious goal to find a *common measurement* of occupational status across a number of countries (Treiman, 1977). Other projects, in particular, the CASMIN project of Erikson, Goldthorpe and Müller, and the Comparative Class Project of Wright; have also – in different ways – developed common standards for classification, and utilized these standards in cross-national analyses.<sup>11</sup> Most of these projects use a simplified version of the basic model of social stratification, showing how destination depends on origins and education only: the OED model; see Fig. 2.<sup>12</sup>

Cross-national research on social stratification has emphasized different parts of the OED model:

- Mobility projects (Erikson & Goldthorpe, 1992; Breen (Ed.), 2004) have emphasized Origin–Destination correlations (C).
- Studies of educational stratification address the Origin–Education linkage (Shavit & Blossfeld, 1993)<sup>13</sup> (A).
- Other projects have focused on the Education–Destination linkage (Shavit & Müller, 1998) (B).

Let us briefly refer some of the most important cross-national studies within social stratification research the last 20–30 years.

<sup>11</sup> An inordinate amount of time (see Wright, 1997, Preface) has been used by researchers working with social stratification to find agreeable measurements across countries of social status—and later social class. It is not the purpose of this introduction to discuss the various ways in which the concept socio-economic status, occupational prestige, and social class is measured. The interested reader should consult the various authors' publications for more detail on these classifications.

<sup>12</sup> In order to estimate the basic model of stratification, one needs metric variables. If occupation is measured as a categorical variable the present state-of-art within categorical data analysis (such as logistic regression and log-linear analysis) limits the possibilities of replicating the basic model of stratification, since these methods do not allow a decomposition of an effect into 'direct' and 'indirect' effects. This is one of the reasons that most of the projects we will refer later in this essay have utilized a reduced version of the basic model of stratification. With better tools for analysing 'paths' with non-linear effects among categorical variables, this model is likely to get a renaissance.

<sup>13</sup> See also Ishida, Muller, and Ridge (1995).

#### 4. Cross-national research on social stratification and inequality

A cross-national design implies three challenges: first, what constitute a “good” comparison? Second, how does one measure and analyze social stratification across societies in a stringent manner, and third, how does one understand variation across societies in the process of stratification? To answer the first question, one needs to try to establish criteria by which comparisons can be judged, that is, one needs to find a methodology that can justify a selection of cases to be studied.<sup>14</sup> To answer the second question, one needs to define concepts that are valid across time and space,<sup>15</sup> and build and utilize relevant models and methods. The basic model of social stratification is an abstract model, suggesting relationships between three important social institutions in modern societies (family, education and the labor market), yet it does not include a notion of the state, i.e. a national context. To answer the third question one needs to have a theoretically informed idea as to why one might expect to find cross-national differences; that is, national contextual effects. In particular, this last question is of relevance to us here: What is the purpose of cross-national studies of social stratification; is it to gain a better understanding of processes of stratification, or to gain a better understanding of differences across countries, or both?

Let us start with Don Treiman's classic work on developing a common cross-national classification of occupations by their (relative) occupational prestige. This study is important, and it was one of the first cross-national studies of stratification.

##### 4.1. Occupational prestige in a comparative perspective

Treiman is often referred to as one of the main exponents of the theory of industrialism (or modernization theory) among social stratification researchers (see for instance Shavit & Blossfeld, 1993, p. 7). His book on *Occupational Prestige in a Comparative Perspective*

<sup>14</sup> Most books on welfare studies include a section on how and why their country cases are selected. Cross-national studies in social mobility are often less explicit about this. As often is the case, the actual reasons for including countries may be pragmatic, such as availability of data and/or researchers within each country, as well as methodologically convincing.

<sup>15</sup> Time: different countries are at different levels of development; space: the measurement ought to be valid in different national contexts. The applicability of our models in terms of time and space is, however, seldom explicitly stated.



(1977) is by now a classic reference in research on social stratification and mobility. Here, Treiman argues in favor of performing cross-national empirical analyses in sociology:

“It seems to me that if we are to arrive at an adequate understanding of the nature of human society, we must replicate the studies made in any particular society in a large sample of societies in order to distinguish three classes of phenomena: those that are universally characteristic of human social systems; those that systematically covary across societies; and those that are unique to particular times and places” (Treiman, 1977, p. 2).

Thus, cross-national studies will help us get a better understanding of human societies. Using 85 national studies of occupational prestige, previously collected, covering 60 countries, he arrives at the conclusion that societies do not differ substantially in their division of labor, and thus, in their relative ranking of occupations by prestige:

“In all complex societies, industrialized or not, a characteristic division of labor arises that creates intrinsic differences among occupational roles with respect to power; these in turn promote differences in privilege; and power and privilege create prestige. Since the same processes operate in all complex societies, the resulting prestige hierarchy is relatively invariant in all such societies, past or present” (Treiman, 1977, p. 128).

One factor that seems to distinguish societies from each other is their level of industrialism. The theory of industrialism would expect countries to become more similar over time, and thus national contextual effects on the stratification process to diminish over time. Underlying this theory is a notion of technological change, driving the societal division of labor in a similar direction, so that the occupational structures, and the associated differences in power, privilege and prestige, will become more similar as societies modernize. Thus, the theory of industrialization would regard cross-national differences in social stratification mainly as a result of different levels of societal development/modernization (see also Ganzeboom, Luijckx, & Treiman, 1989).<sup>16</sup>

<sup>16</sup> The theory of industrialization, which often is related to Parsons' work, has been influential in a number of different areas. See for instance Goode (1963) who argued that differences (across countries) in family types would converge over time. Later studies do not, however, support this expectation.

The next contribution I would like to discuss is the influential book *The Constant Flux*, by John H. Goldthorpe and Robert Erikson, which summarizes approximately 10 years of work on the CASMIN project (Comparative Analysis of Social Mobility in Industrial Nations).

#### 4.2. *The constant flux: a study of class mobility in industrial societies*

Erikson and Goldthorpe start their book with a discussion of the motivation for undertaking cross-national research in social stratification: “The ultimate concern of this study is with the sociology of industrial nations. Its focus on social mobility reflects the centrality that this topic holds in prevailing theories of industrialism and in debates on various aspects of industrial society” (Erikson & Goldthorpe, 1992, p. 1). The basic model of social stratification addresses the relationship between a social structure (related to a specific division of labor) and the mobility of individuals between positions within this structure. Social mobility (or lack of mobility) can be expected to have an impact on people's identities and attitudes, and, in turn, “. . . to determine where, and with what degree of sharpness, lines of cultural, social, and political, as well as economic division are drawn” (Erikson & Goldthorpe, 1992, p. 2). The levels of relative social mobility within societies (at a particular time) can be taken as a measure of the degree to which these societies are open or not, that is, providing its citizens with equal opportunities or not.<sup>17</sup>

<sup>17</sup> In the CASMIN project Goldthorpe and Erikson simplifies the basic stratification model by focusing on the bivariate relationship between origin and destination. This has been criticized as a step backwards, since it reduces what was close to a behavioral model to a structural model, looking at the relationship between two macro variables (class structure of fathers and class structure of sons). There were, however, at least two reasons for this change of models: one was related to the lack of control of changes in the occupational structure in the basic model of stratification. Structural changes at macro-level are not included in a path-model of individual mobility. And without control for changes in the marginals of a mobility matrix, one cannot distinguish between absolute versus relative mobility, that is, mobility caused entirely by structural changes (such as the decline of farmers) versus mobility as reflected in relative opportunities of, for instance, children from the working class compared to children from the middle-class. The other reason was a methodological argument, related to the assumption about linear effects in the basic model of stratification. Since it is not obvious that the effect of, say, education is similar for access to different class locations (such as the self-employed versus the service class), and since Erikson and Goldthorpe devised a categorical measure of social class (instead of metric measures such as socioeconomic status and social prestige), the OED model was simplified to the bivariate OD model (Goldthorpe, personal communication).

The CASMIN project analyzed social mobility in 12 industrial nations. Their comparative strategy is a mixed design, combining a quantitative and a qualitative strategy. Survey data are analyzed in order to compare mobility rates and patterns across nations.<sup>18</sup> In order to explain cross-national differences in absolute mobility, i.e. in the class structures, the authors argue that specific, national historical explanations are more important.<sup>19</sup> Erikson and Goldthorpe discuss mobility rates with a particular reference to the theory of industrialization, or, what they call the liberal theory. In general, this theory would expect to see steadily increases in mobility and openness in industrial nations.<sup>20</sup> The results of their empirical analyses do, however, not confirm this theory:

“We have sought . . . to use data from European nations in order to evaluate various arguments concerning mobility trends within industrial societies. The major outcome, it might be said, has been a negative one: that is, considerable doubt has been thrown on claims associated with what we have called the liberal theory of industrialism. We have found no evidence of general and abiding trends towards higher levels either of total mobility or of social fluidity within the nations we have considered; nor evidence that mobility rates, whether absolute or relative, are changing in any other consistent direction; nor again evidence that such rates show a tendency over time to be cross-nationally similar” (Erikson & Goldthorpe, 1992, pp. 101–102).

Absolute rates of mobility, which measure the actual movements from ‘origins’ to ‘destinations’ across generations, often show wide, but trendless fluctuations, whereas the relative mobility rates, as expressed in terms of odds ratios (i.e. the likelihood of being mobile or not for persons in one class location compared to the likelihood of being mobile or not for persons in another class

location) show more stability over time and communalities across countries. Thus, the title of their book: *The Constant Flux*.

The authors also develop a ‘core model’ in order to capture similarities across countries in their mobility regimes.<sup>21</sup> In a later comment, Goldthorpe (in press, note 10) argues that some countries (Australia, the former Czechoslovakia, Israel, Norway, Poland and Sweden) have, over the middle and later 20th century, been more open (higher levels of social fluidity) compared to other countries (France, Germany, Ireland and Italy). The ‘core model’ helps to identify the specific sources of such variation, while claiming a “basic similarity” across countries.

Erikson and Goldthorpe’s main conclusion therefore, is that fluidity patterns are similar, but class structures differ due to country specific historical features, such as politics, in addition to processes of industrialization, as well as influences from the international political economy.<sup>22</sup> Let us now turn to another important cross-national study, which addresses the Origin–Education linkage of the basic model of stratification.

#### 4.3. *Persistent inequality: changing educational attainment*

In 1993, Yossi Shavit and Hans-Peter Blossfeld published a widely cited book on educational attainment, comparing 13 countries, with the telling title *Persistent Inequality*. This project represents a new strategy for cross-national research, where scholars from different countries collaborate on the same topic, utilizing as similar data as possible from their countries of origin, and agreeing on a common research design.<sup>23</sup> “During the twentieth century, industrial societies have experienced a remarkable process of social and economic change . . .

<sup>18</sup> Later, Goldthorpe (in press) has developed a theoretical model to explain relative mobility rates in behavioral terms, since “. . . the patterns of relative mobility chances . . . would seem to be determined through processes that are systematic and also context-independent; that is, that operate in much the same way over a wide range of societies” (Goldthorpe, in press, p. 7).

<sup>19</sup> “Thus, the explanations we will suggest for features of mobility of special interest to us, in particular, nations will often be ones couched in terms of the more immediate effects of events, conjunctures, and social processes occurring within these nations” (Erikson & Goldthorpe, 1992, p. 61).

<sup>20</sup> For instance, Lipset and Zetterberg argued that “. . . the structural changes associated with industrialism produce a similar expansion of opportunities for social advancement” (referred in Erikson & Goldthorpe, 1992, p. 22).

<sup>21</sup> The ‘core model’ was based on the FJH hypothesis, developed by Featherman, Jones and Hauser.

<sup>22</sup> Exemplifying their case, the authors refer to historical evidence on the contraction of agriculture. Referring to agrarian historians, “. . . the pace and timing of agricultural contraction . . . reflect whether nations were at the centre or on the periphery of international trading relations, in a position of economic dominance or dependence; and, further, the policies that their government adopted towards agriculture in regard to both its social organization and its protection against exposure to market forces” (Erikson & Goldthorpe, 1992, p. 103).

<sup>23</sup> The book is described as “. . . a milestone in the on-going effort of stratification researchers to reconstruct the field of comparative stratification using modern analytic methods” (David Grusky’s Foreword in Shavit and Blossfeld, 1993). Thus, also as a research design, this project has been very successful and has set a standard for later cross-national studies of stratification, resulting in a series of cross-national research projects.

(related to) . . . industrialization, bureaucratization and the expansion of the state” (Shavit & Blossfeld, 1993, p. 1). Both general processes related to industrialization and the expansion of the welfare state, the authors argue, are of importance for research on educational inequality.

The general theory of modernization expects education to play an increasingly important role in the process of stratification, and educational expansion is also expected to imply higher levels of equality in educational attainment. The welfare states Shavit and Blossfeld included (13 countries) are classified into three groups: (1) Western capitalist countries; (2) non-Western capitalist countries and (3) Western formerly socialist countries. These countries represent considerable variations in

“... the level and timing of industrialization, (...); the political system (democracies, socialist states, and non-democratic states); the structure of distributive systems (market-based vs. bureaucratically determined, ethnic vs. class stratification); the organizational form of the school systems; ...; and formal public commitment to equality of opportunity” (Shavit & Blossfeld, 1993, p. 11).

Perhaps to their surprise, despite educational expansion, the authors did not find major changes in educational stratification in 11 out of 13 countries; with Sweden and the Netherlands being the only countries where a marked equalization among socio-economic strata in educational attainment took place (Shavit & Blossfeld, 1993, p. 20). In the other countries, educational expansion has led to only small changes in educational opportunities, an apparent paradox, which could be explained by the fact that when the educational system expanded, educational attainment increased for children in all social classes, including also children from higher socio-economic strata. Thus, educational attainment has increased, but (except for Sweden and the Netherlands) not educational opportunities (relative class differentials in educational attainment).

“Thus, the modernization theorists’ hypothesis that educational expansion results in greater equality of educational opportunity must be turned on its head: expansion actually facilitates to a large extent the persistence of inequalities in educational opportunities” (Shavit & Blossfeld, 1993, p. 22).

The study also document that women now take as much education, and in some countries even more education than men. Thus, if the authors had been more preoccupied with gender differences (instead of class differences), their conclusion would inevitably

have been in favor of declining inequality (which they also acknowledge). An interesting topic worth exploring in the future would be to perform similar analyses when the educational attainment of women has reached its level of saturation.<sup>24</sup> The expectation would then be that given further educational expansion, we would see a decline in class inequalities in educational attainment.

*The Persistent Inequality* book was followed by a number of studies exploring the same topic, often with different conclusions. As summarized by Breen and Jonsson (2005) subsequent analyses have shown equalization in a number of countries, with some exceptions, and continuous support for the results for Sweden and the Netherlands, thus “. . . it is likely that many countries share a trend toward a decreasing association between social origin and educational attainment” (see references in Breen & Jonsson, 2005, p. 226).

#### 4.4. *Class counts: comparative studies in class analysis*

The Comparative Project on Class Structure and Class Consciousness was headed by Erik Olin Wright, who, summarizing more than 10 years of cross-national work, published the main book from this project, called *Class Counts*, in 1997. Instead of addressing the theory of industrialism or modernization, Wright wanted to understand the role of the growing middle-class in modern societies and developed a neo-Marxist model of social class in capitalist societies. He then uses class as an explanatory variable to explore issues such as the class structure and its transformation; the permeability of class boundaries (network); class and gender; and class consciousness. Thus, this project has extended the basic model of stratification by addressing the explanatory power of class for a number of issues that may be regarded as possible *consequences* of class position at destination.

The analyses in the book are based on survey data collected in the 1980s. Classifying people according to his class model, Wright addresses the commonalities across societies related to capitalistic class relations. The countries included in these analyses (six countries) are approximately at the same economic level, argues Wright, and for the employees “. . . there is relatively little variation in class distributions across these coun-

<sup>24</sup> In many countries women now have higher educational attainment than men within the same cohorts, i.e. it seems that women exceed men’s level of saturation.



tries” (Wright, 1997, p. 73).<sup>25</sup> He does, however, find some differences related to the relative size of the capitalist class and the self-employed, which comprise 4–8% of the labor forces of these countries. However:

“Considering the differences in other aspects of the political economy of these countries which might be thought relevant to the size of their capitalist classes – the size of their domestic markets, the recentness of their industrialization, their position in the world economy, the role of the state – this is a relatively small range of variation” (Wright, 1997, p. 48).

Thus, I believe it is fair to say that Wright’s class model of capitalistic employment relations are to be regarded as an abstract model. In implementing this model, Wright finds, perhaps to his surprise, small differences across countries with different welfare states.

#### 4.5. *From school to work: a comparative study of educational qualifications and occupational destinations*

This book, edited by Shavit and Müller (1998), is another example of the cross-national research strategy employed by Shavit and Blossfeld (1993). The book addresses the transitions from school to work in 13 countries. The authors argue in their preface:

“Countries differ in the way they organize education and channel each new generation through their diverse educational systems. Countries also differ in their labour-market institutions. This book is concerned with varying institutional characteristics of educational systems and their effects on occupational outcomes” (Shavit & Müller, 1998, Preface).

In particular, differences in the educational systems are important, related to their degree of vocational specificity (in secondary education), degree of standardization, degree of stratification, and the rate of tertiary school attendance. The authors also include two arguments for national similarities in the transition from

<sup>25</sup> For instance, the lower level of supervisors in Sweden compared to the US, argues Wright, is most likely a result of national specific politics: “There may thus be fewer supervisory employees in Sweden than in the United States at least in part because the differences in the labor movements, class compromises, and problems of labor discipline in the two countries make it less necessary for Swedish capitalists to devote so many positions and resources to social control activities” (Wright, 1997, p. 58).

school to work. One argument is based on the industrialization hypothesis, credited to Treiman,<sup>26</sup> and the other argument is based on a neo-institutionalist approach, which would expect a diffusion of standardized models of education across countries.

The empirical analysis performed by Shavit, Müller and their team shows that in countries with a low level of vocational training, the linkage between educational qualifications and occupational attainment is weaker than in countries with more specific vocational training. It seems, therefore that in countries without specific vocational training, employers do not find the specific type of qualification they seek, and therefore have to rank applicants by their general educational characteristics (queuing). Thus, the link between educational attainment and occupational attainment will be stronger in countries where employers can find workers with the appropriate specific training (such as Germany):

“The single most important conclusion of this study is that the effects of education in the occupational attainment process, and its impact on employment chances in the labour force, are indeed systematically conditioned by the respective institutional contexts. Both the magnitude and the shape of the effects vary between countries, and this variation is due, to a large extent, to differences in the social organization of education” (Shavit & Müller, 1998, p. 36).

The authors also find similarities across countries; for instance, marginal returns to education are higher at higher levels of education. They also find that for both men and women, in all countries, educational qualifications are important for entering the prestigious occupations. The fact that institutional context matters for the transitions from school to work, does not support arguments advanced by the neo-institutionalist and industrialization theories. Yet, the fact that they find similarities across countries might indicate support for these theories. Shavit and Müller are also aware that there are important features that they have been unable to include in their analyses, such as the role of the demand side in the labor markets, of work place factors, of professional and other work organizations (Shavit & Müller, 1998, p. 42).

<sup>26</sup> “As a result of the rationalization of the production, international competition, and the operation of multinational companies, societies are said to converge to a common pattern of occupational stratification (Treiman, 1970)” (Shavit & Müller, 1998, p. 8).

#### 4.6. Social mobility in Europe

The last book I will include in this brief overview of cross-national research on social stratification addresses social mobility in Europe, edited by Breen (2004). This book is also a product of a cross-national collaboration similar to the *Persistent Inequality* book, yet with a tighter design, using more comparable data and measurements, as well as longitudinal data. The main purpose of this project was to update the knowledge about mobility patterns evolving after the findings of the *Constant Flux* (which was based on data from the 1970s), with data covering the period from early or mid-1970s to the mid or late-1990s. This project utilizes repeated surveys from each country over a 30-year period, and could therefore look at temporal change, using individual-level comparative data, in a way that had not been done previously.<sup>27</sup>

The results of this project differ from the main conclusion of the *Constant Flux*. Erikson and Goldthorpe had only access to one cross-sectional survey per country (from early 1970s), whereas Breen and co-workers have analyzed several surveys from each country, covering a longer time span (approximately 30 years), allowing the researchers to estimate country specific changes over time in social fluidity. These data files include information on women as well, which Erikson and Goldthorpe did not include.<sup>28</sup> The national studies in this book, as well as the comparative cross-national analyses performed by Breen and Luijkx (2004a, 2004b), show a tendency over time for increasing social fluidity, or openness, in 9 out of 11 countries included (Breen & Luijkx, 2004a, 2004b, Table 15.1).<sup>29</sup> The transition from agricultural societies to industrial; and later, the coming of post-industrial societies have also implied that the occupational structures have become more similar across

societies; a fact that might have a bearing on the relative openness of societies as well.

In addition to occupational changes related to economic development, other factors, such as immigration and changes in the educational systems, are also mentioned as possible explanations of social fluidity patterns (Breen & Jonsson, 2005). Since various authors disagree on the ‘diagnosis of the situation’ (that is, fluidity), it is rather likely that the discussion and analyses of mobility patterns has not come to an end.

The Social Mobility in Europe book also include a brief discussion on the impact of welfare state regimes on social mobility: “This leads to the conclusion that direct political intervention of the kinds associated with state-socialist [Poland and Hungary] and social democratic societies [Norway and Sweden] may be one means by which a society may reach relatively high rates of fluidity” (Breen & Luijkx, 2004a, 2004b, p. 401).

Mobility research, focusing on the Origin–Destination linkages, has been criticized for lacking an understanding of the social mechanisms involved in the mobility process. The Origin–Education–Destination model, however, provides one mechanism (educational attainment) as an important mediating factor in a mobility process, and, being aware of the absence of “... well developed and testable behavioural theories of the social fluidity regime” (Breen & Luijkx, 2004a, 2004b, p. 392) the authors utilize cross-national datasets from 11 countries for testing the OED relations. Theories of industrialism and the importance of qualifications for access to jobs in the post-industrial society, should lead us to expect origin to have less impact on education and destination, and the education–destination association to strengthen. However, their analyses surprisingly document that the increase in social fluidity in many countries has not been due to greater importance of educational attainment for destination in the labor market, rather, they argue, there has been a decline in all associations in the OED model: “In particular, the decline in the associations between origins and educational attainment and between origins and destinations, when holding education constant, seem to be significantly linked with increasing social fluidity” (Breen & Luijkx, 2004a, 2004b, p. 401).<sup>30</sup>

<sup>27</sup> There has been a development in data comparability and methodology since the first collaborative projects “... which has allowed them [the researchers] to move from visual examination of the results of similar analyses across countries (Shavit & Blossfeld, 1993), to meta-analyses (Shavit & Müller, 1998), and to direct modelling of individual-level data from different countries (Breen, 2004)” (Breen & Jonsson, 2005, p. 237).

<sup>28</sup> For a discussion on the applicability of the Erikson-Goldthorpe class scheme to women, see Birkelund, Goodman, and Rose (1996) and Evans and Mills (1998).

<sup>29</sup> Britain and Israel are the two countries without a significant increase in fluidity. The authors discuss data and classification, and then argue that “... there is a widespread tendency for social fluidity to increase, even though this might not be a statistically significant trend in every case. Among men, the value of  $\beta$  is less at the end of the period than at the start in every country except Britain and Israel (where the values remain the same). ... For women the picture is very similar” (Breen & Luijkx, 2004a, 2004b, p. 389).

<sup>30</sup> The authors develop a new method to try to decompose the effects in a log-linear model; a contribution which is difficult and still open for discussion. When such a device is ready, log-linear methods can also be used for testing the associations of the basic model of social stratification. The method used by Breen and Luijkx allows them to discuss partial effects within a model using only categorical data, and they find that “In all five countries [addressing the role of education in

Thus, this study concludes in favor of the liberal theory of modernization, which focused on absolute rates of mobility, arguing that “. . . if current trends in the development of class structures are maintained, then, despite the large differences between them in their patterns of fluidity, the countries in Europe may yet prove Lipset and Zetterberg’s assertion true” (Breen & Luijkx, 2004a, 2004b, p. 403). The transition of the occupational structure, in terms of declining farming and working classes, has taken place in all countries included in the study.<sup>31</sup>

#### 4.7. Summary

I have in this section discussed a few empirical cross-national studies, which I believe are of major importance for future work in social stratification and mobility. These studies can be clustered into three groups. The first group addresses the thesis of convergence between countries; i.e. the theory of industrialization and modernization, also called the liberal theory. As we have seen, Treiman advocates this theory; Erikson and Goldthorpe disagree with it, whereas Breen and Luijkx, with some reservations about future trajectories, partly agree with the liberal thesis. Breen and Luijkx also include a very brief discussion on political intervention as a possible explanation for the higher levels of social fluidity in state-socialist and social democratic countries.

The second group deal with more specific topics within the stratification process, such as educational attainment (aware of two exceptions, Shavit and Blossfeld emphasize similarities across countries in educational attainment); and the transition from school to work (Shavit and Müller find differences across countries in their educational systems and school-work linkages). In these studies the impact of policy issues and welfare state research is discussed.

Finally, Wright belongs to a group on his own, addressing other research questions, primarily exploring the impact of social class on a variety of different aspects, in various national contexts. Wright finds little variation across societies in their class structures, and

social fluidity], we observe a weakening of the link between education and class destination, but in France, Sweden, and the Netherlands we see two further effects neither of which is found in Britain or Ireland. First, the link between class origins and educational attainment has weakened; and, second, the direct partial effect of origins on destinations, controlling for education, has also declined” (Breen & Luijkx, 2004a, 2004b, p. 394).

<sup>31</sup> Lipset and Zetterberg argued that “the overall pattern of social mobility appears to be much the same in the industrial societies of various western countries” (Lipset and Zetterberg, 1959, quoted from Breen & Luijkx, 2004a, 2004b, p. 403).

he therefore does not need an interpretation related to differences across countries in their welfare states.

Thus, only the two volumes on education, edited by Shavit and Blossfeld and Shavit and Müller, include a discussion of welfare state research. This being said, we should add that a number of other cross-national studies of social inequality<sup>32</sup> utilize welfare state research; yet our main focus here has lied with social mobility studies. The studies referred above, and more could have been added, reveal both differences and similarities across countries. Where does this take us? Let me try to emphasize some issues that I think should be addressed in future work.

### 5. Key issues in cross-national research on social stratification

Let us return to Treiman’s argument about the motivation for doing cross-national studies of social stratification. We ought, he says, be able “. . . to distinguish three classes of phenomena: those that are universally characteristic of human social systems; those that systematically covary across societies; and those that are unique to particular times and places” (Treiman, 1977, p. 2).

Nearly 30 years after, we have seen that all classes of phenomena are present. Research within social stratification have primarily addressed issues that are universal, such as the existence of a class structure and mobility processes, and discussed common features related to processes of convergence or not. When differences between countries are found, they are usually attributed to historical and specific explanations that are unique to each country.

A careful re-reading of this research would, I think, indicate that at least some of the issues identified as

<sup>32</sup> See for instance *The Reemergence of Self-Employment. A Comparative Study of Self-Employment Dynamics and Social Inequality*, edited by Arum and Muller (2004), also designed in the cross-national spirit of the *Persistent Inequality* book. The book includes 11 countries, and identified “. . . variation across three traditional political regime types (neoliberal, corporatist, and postsocialist states) as well as along two conceptual dimensions (labor market regulation and the level of societal prevalence of family based social capital)”. Thus, again a study emphasizing similarities across societies related to general dimensions, as well as differences between them related to country specific (or rather, regime specific) policies. See also the increasing number of cross-national studies on women’s situation; e.g., Rosenfeld and Birkelund (1995), Wright, Baxter, and Birkelund (1995), Gornick and Jacobs (1998), Blossfeld and Hakim (1997), Blossfeld and Drobnic (2001), Stier, Lewin-Epstein, and Braun (2001), Birkelund and Sandnes (2003), Crompton (2006).

unique to countries, in fact are features that covary across societies; such as the degree of economic development, international market exposure, history of class organization and political traditions, level of social inequality, timing of introduction of various types of technology, etc. This has been acknowledged by some researchers who have tried to relate cross-national differences in fluidity to cross-national differences in macro variables (see, for example, Breen & Luijkx, 2004a, 2004b, pp. 395–398; Erikson & Goldthorpe, 1992, pp. 379–389; Grusky & Hauser, 1984).<sup>33</sup> Their conclusions differ somewhat,<sup>34</sup> which can be taken as an indication of the need to think more careful about which country-level characteristics that may be important to include, and how these characteristics should be measured and modelled. In summarizing their seminal project on mobility in Europe, Breen and Luijkx (2004b, p. 402) also argue that aggregated patterns can reflect a large number of underlying processes (for instance related to immigration) that has not been accounted for in mobility research:

“For one thing, this aggregation of processes renders it difficult to explain variations in fluidity; for another, it may also be the case that some of the communalities that has been observed in comparisons of social fluidity derives from mixing together in the mobility tables of processes that, when investigated separately, might show greater and more systematic societal and temporal differences” (Breen & Luijkx, 2004b, p. 402).

Welfare state research primarily emphasizes issues that systematically covary across societies, such as the relationship between the family, market and state, and this research investigates several processes separately that may be of interest to social stratification research. This tradition has however not been particularly involved in understanding social stratification.<sup>35</sup> An obvious conclusion would be that there is no general agreement as to cross-national trends. Let us therefore discuss some issues that would be of interest to clarify in future work. I want to start with Stanley Lieberson, who in *Making it Count* (1985) has provided sociology with a powerful metaphor.

<sup>33</sup> Richard Breen also refers to Treiman and Yip (1989).

<sup>34</sup> For instance, whereas Erikson and Goldthorpe (1992) find that countries with low levels of social inequality have higher levels of fluidity, Breen and Luijkx (2004a, 2004b), using more recent data, do not find this.

<sup>35</sup> Esping-Andersen (1993), however, has developed a new class model.

### 5.1. A note on gravity versus variation

In an important critique of social science, Lieberson argues that we address wrong (less important) research questions. We are too concerned with variation, therefore loosing the most important part of the story in our research. He uses a gravitational exhibit in Toronto as a heuristic example. In the exhibit, a feather and a coin are dropped inside a vacuum tube, and the two objects reach the ground at about the same time. The existence of a constant causal force, gravity, has been demonstrated empirically.<sup>36</sup>

Whereas the natural sciences can set up experiments (introducing vacuums), the social sciences usually cannot. Thus, if social scientists were to understand falling objects, we would have to rely on data about falling objects without a vacuum tube. And then, as we all know, the coin and the feather would not hit the ground at the same time. We would also observe that the feather and the coin would fall in different ways. Given this, argues Lieberson, our research questions would not be to understand the fact that all objects fall, rather: “If social researchers find that the objects differ in the time they take to reach the ground, typically they will want to know what characteristics determine these differences” (Lieberson, 1985, p. 100). If the researcher is fortunate, he or she will be able to account for all factors that determine differences in the velocity of the objects; thus, “The investigator, applying standard social research thinking, will conclude that there is a complete understanding of the phenomenon because all differences among the objects under study have been accounted for” (Lieberson, 1985, p. 100).

Lieberson’s main criticism of social science is obvious: being too preoccupied with variation, we lack an understanding of the most important causal force(s) generating the social phenomenon we study. We do not understand gravity, because it is a common factor for all falling objects, and social science is too occupied with studying variation in a dependent variable. We should, however, first “. . . be reasonably satisfied that we understand why an entity or a process exists to begin with before turning to questions about its variation” (Lieberson, 1985, p. 104).<sup>37</sup>

Lieberson uses social stratification as an example from social science. In the study of inter-generational

<sup>36</sup> Since the vacuum is not perfect, the coin will probably reach the ground a little earlier than the feather.

<sup>37</sup> A precondition for this argument is of course that important causal forces common for several objects/processes in fact are operating.



occupational mobility, he argues, the researchers are satisfied if they, by including measures of social origin, educational level and so on, are able to fully account for inter-individual differences in socio-economic status.<sup>38</sup> Knowing why people differ in their socio-economic characteristics (SES) does, however, not provide us with an answer to the more fundamental questions, which is “. . . why SES characteristics exist . . . (and) why the particular system of SES linkages occur” (Lieberson, 1985, p. 102).

The question then is why we address the less important questions. One obvious reason is that we usually have data on variation; however, “data on the phenomenon of interest are not necessarily data relevant for the question of interest” (Lieberson, 1985, p. 102). Therefore, we should first address the fundamental questions, and this would imply establishing an understanding of the dependent variable, before analyzing its variation.

The causal force explaining why objects fall (gravity) is not necessarily the same mechanism that can explain variation in their paths and speeds, yet we might expect gravity to be of relevance also for this research question. The equation for a falling object would include factors such as the weight of the object, the shape of the object, air resistance, an element measuring side winds, etc., in addition to, of course, gravity. It is not the case that gravity is not relevant to include in this equation, yet for most practical purposes it will be a constant, and therefore something we may overlook.<sup>39</sup>

In a similar vein, theories that can explain *variation* in social mobility over time and across countries (such as the constant flux, or, welfare state theory, or the liberal theory expecting convergence), can probably provide only limited insight into why and what social stratification is. For this, we need theories of social stratification, such as the basic model of stratification, which do not consider the impact of context, but seek to explain processes of stratification in a more abstract way. This means that the general theories of social stratification should address the gravity question (what is stratification and how does it operate?), whereas the welfare state theories and other theories about cross-national variation (or similarity) should address variation in social stratification across societies (falling objects).

Can we learn something about social stratification by studying variation across countries in social stratification? That is, will we discover gravity by addressing variation among falling objects? Well, apparently, falling apples inspired Newton. That is, we have certainly learned a lot about social stratification from cross-national projects. Nevertheless, we may address gravity more directly, by taking a fresh look at the basic model of stratification. An important point of departure is addressing social mechanisms.

## 5.2. A plea for social mechanisms

Jon Elster once argued that class analysis was a variety of botany, and systems of taxonomy work best if we have a clear understanding of the mechanisms generating the taxonomy. Without such insights we are unable to provide an explanation of social inequality. The studies we have discussed here are based on more elaborated classification schemes than the earlier class schemes; thus it is fair to say that stratification research has improved substantially since this criticism was voiced.<sup>40</sup> Nevertheless, the basic model of social stratification comprises three social institutions: the family, the educational system and the labor market. Estimating the model we find effects from origin on education, from education to destination and from origin to destination; yet the model is not a behavioral model as such, and we do not have sufficient knowledge about internal processes within these institutions. For instance, assumptions are made, often implicit, that parents act in certain ways; that teachers act in certain ways; that employers act in certain ways, etc., i.e. we analyze relations between “black boxes”.

Hedstrom (2005, p. 27) referring to Suppes, argues “. . . one man’s mechanism is another man’s black box”,<sup>41</sup> that is, every new generation of researchers should have the ambition of opening one or more “black boxes” of the previous generation of researchers; that is, trying to understand the mechanisms involved:

“From the perspective of sociological theory, one important reason for insisting on a detailed specification of mechanisms is that it tends to produce more precise and intelligible explanations. Another important reason is that a focus on mechanisms tends

<sup>38</sup> In a regression design it is never possible to ‘fully account’ for the variation in the dependent variable; yet in log–linear modelling, this is the optimal model, which is often achieved.

<sup>39</sup> Gravity will vary slightly depending on where we measure it (for instance at the poles versus the equator; or at the sea level versus on top of a high mountain).

<sup>40</sup> In particular, Wright (1997) and Goldthorpe (2000) have provided important theoretical rationale for the logic underlying their classification schemes (as well as behavioral models). See also Sorensen (1996) who argues that ‘rent’ is the basis for formation of classes, and Breen and Jonsson (in press) who develop a theoretical model of social fluidity, emphasizing differences between period- and cohort effects.

<sup>41</sup> See also Goldthorpe (2000), p. 149, note 8.



to reduce theoretical fragmentation. . . . Finally, it is the knowledge about the mechanism as such, . . . , that gives us reason to believe that there indeed is a genuine causal relationship between the proposed cause and its effect, and not simply a correlation” (Hedstrom, 2005, p. 28).

In addition to the ‘black box’ problem, earlier stratification analysis can also be subject to criticism for exploring macro–macro relationships (such as OD), without including an understanding of the micro-level (Coleman, 1990). The last 20 years or so, important steps have been taken to provide a clear definition of the actor in stratification research: Goldthorpe has written on rational action theory and Wright on rational choice and game theoretical explanations for class relations. An interesting development could be to include belief-formation (Boudon, 1998; Breen, 1999). Hedstrom’s definition of the social actor, with an emphasis on intentionality (including believes), localizes the actor within social relations (networks); a perspective which also could be considered for class analysis (Hedstrom, 2005).<sup>42</sup>

The educational system and the labor market are important structures of opportunities. Behavioral models of educational attainment (Boudon, 1998; Breen & Goldthorpe, 1997; Erikson & Jonsson, 1996) and social mobility (Goldthorpe, *in press*) have been developed, directly related to Lieberson’s problem of gravity; yet we still need more theoretical work, in particular, on ‘education’ and ‘market’, two vital social institutions in the basic model of stratification. This means extending the basic model of stratification, which has focused on positions in the occupational structure (status or class) as the dependent variable without going one step further to explore the labor market. As argued by Breen and Luijckx (2004a, 2004b, p. 391):

“Theories of mobility or fluidity are concerned with how this association [between parent’s and child’s class] arises through the interaction of resources possessed by families and children and the demands of

the labour market, most often directly expressed in the hiring decisions of employers and employing organizations”.

Lately, income inequalities in many societies have increased, often, but not only, as a result of differential allocation of rewards to different positions.<sup>43</sup> Social stratification researchers have begun the task of gaining a better understanding of economic inequalities. I believe we will be able to come up with more interesting explanations than many economists working on this topic, since we have different conceptual tools, but for this to happen, I would claim that sociologists in general, including welfare state researchers and social stratification researchers, need to get a better understanding of how the labor market works. As Bowles and Gintis (2002) have argued, we have been too focused on education when trying to understand income inequalities. Perhaps we have a meritocratic hang-up?

### 5.3. *A meritocratic hang-up?*

In an engaged critique of sociology, Rubinstein (1988, p. 540) argues that sociology assumes that markets are essentially meritocratic, or, he says, drops all mention of the market and simply describes modern societies as meritocratic, and confuse the meritocratic ideal of distributive justice with equity.<sup>44</sup>

“Students of stratification have consistently found that the match between income and the measurable value of labor, e.g. education, IQ, grades in school, etc. is weak. This is commonly interpreted as an absence of equity, a betrayal of meritocratic principles. It is more properly interpreted as the result of a market. The market, under entitlement theory, is not bound to guarantee that ‘the superior receive the benefit of his superiority’” (Rubinstein, 1988, pp. 549–550).<sup>45</sup>

<sup>42</sup> The past and present focus on social network, as well as on status groups, could be interpreted into a relational and reciprocal framework, since these perspectives emphasize mutual relationships between people who are bound together in various forms of family and friendship networks. For instance, in their operationalization of social status groups Chan and Goldthorpe (2004) use information about the individuals’ closest friends; a relationship which could be expected to be dominated by trust and reciprocity, as well as other motivations. See also Boudon (2006), Gambetta’s work on trust (2006), and Bowles and Gintis (1998) who have launched the concept of *Homo reciprocans* as an addition to *Homo economicus*.

<sup>43</sup> In many countries, included my own, a substantial amount of the increased income inequality is derived from capital assets, not earnings.

<sup>44</sup> As university trained academics, sociologists are used to principles of meritocracy. Perhaps this is why we for so many years have been convinced about the meritocratic principle of justice, asks Rubinstein: “A university institutionalizes meritocracy. There are boards of review composed of expert members to guarantee that the normative commitment to merit is operationalized. But a market provides no such institutional support for meritocratic norms and hence is not a meritocracy” (Rubinstein, 1988, p. 542). See also Arrow, Bowles, and Durlauf (eds.) (2000).

<sup>45</sup> Rubinstein refers here to Herbert Spencer’s statement that “The superior shall have the good of his superiority; and the inferior the evil of his inferiority” (Spencer, quoted in Rubinstein, 1988, p. 549).

Recent studies on social mobility have in fact documented declining effects of education on destination in several countries (Breen & Luijkx, 2004a, 2004b, pp. 394–395; Goldthorpe & Jackson, 2006). Given the expectations of modern labor markets as more meritocratic, this is an interesting empirical finding. These expectations however, are mainly based on a supply side perspective, without addressing the vital question about the demand for labor. Thus, the market is a key issue to be considered.

#### 5.4. The market

A labor market provides a structure of opportunities for employees seeking employment. Although we know that employers' decisions are as vital as the employees', we rarely have data on employers, and, in most theories of social stratification, an understanding of the labor market is not included, i.e. the basic model of stratification does not include a notion of a market; rather, destinations seem to be established as a (magical) result only of individuals' educational attainment and their family of origin. The basic model of stratification is an *inter-generational* model based on the family institution, addressing differences across generations; whereas if we are to understand the market, we often need to address *intra-generational* issues, such as career paths over a life-course (DiPrete, 2002). Nevertheless, despite the fact that the basic model of stratification has no notion of the existence of a labor market, when reading literature on social stratification and mobility, it is often the case that the interpretation of the analyses includes assumptions about the employers' behaviors and rationale.<sup>46</sup>

According to the liberal theory of industrialism increased competition in industrialized societies will imply declining importance of ascribed characteristics, such as gender and race, in favor of a more meritocratic based allocation, emphasizing achieved qualifications.<sup>47</sup> Thus, markets would be characterized by less ascription,

<sup>46</sup> Shavit and Müller discuss the relevance of the theory of queuing, since they find that different educational systems seem to influence the employers' decisions on who to hire (Shavit & Müller, 1998). Jackson et al. (2005) have studied job advertisements. In his outline of a theory of social mobility, Goldthorpe (in press) includes a discussion on employer's behavior and decisions. And Petersen (2006) discuss employers' motives and cognition.

<sup>47</sup> The implication of this would be an end to discrimination, since in the long run, firms which do not hire the best qualified workers would end up with a less productive work force, and their business would therefore loose in a competitive market.

more achievement.<sup>48</sup> This argument should, however, not lead us to think that the higher qualifications, the higher rewards. Rewards are dependent on what employers are willing to pay, and if the supply is higher than the demand for a specific type of qualification, the average rewards of persons with this type of qualification would be lower than one might otherwise expect, given the amount of training associated with it. This insight, simple as it may be, is often neglected, in particular, by exponents favoring the meritocratic principle.<sup>49</sup>

Similarly, as argued persuasively by Goldthorpe (in press), there is no reason to believe that employers value merit in the same way as the educational system do. If we are to understand why and how the linkage between education and destination (ED) seems to be weakening, we may need to change our ideas of what matters in the working life. Employers may have "... their own ideas about what represents merit – or at least productive value – in employees, which, not unreasonably, will vary from one type of employment to another" (Goldthorpe, in press, p. 32). Meritocracy is probably more important in those parts of the labor market where there are jobs with clear educational requirements, such as within the professional and semi-professional occupations. And even here, we find that a number of other factors, both individual (such as non-merit characteristics like for instance trustworthiness) and organizational (such as unions), may have an impact on wages (Hogsnes, 1989) and, in some cases even on the recruitment into professions.<sup>50</sup> Within other parts of the labor market persons with lower levels of qualifications may find ports of entry into firms which offer internal career ladders and on-the-job train-

<sup>48</sup> Within other areas of social stratification research, there are important studies on gender and the labor market, ethnicity and the labor market, etc. See, Gonas and Karlsson (Eds.) (2006), and Heath (Ed.) (2006); Powell (Ed.) (1999).

<sup>49</sup> An early version of this insight can be found in Davis and Moore (1945) "Some Principles of Stratification", where they argue that the highest rewards go to positions which are (a) functionally important to the society, and for which (b) the qualifications required are scarce: "... if the skills required are scarce by reason of the rarity of talent or the costliness of training, the position, if functionally important, must have an attractive power that will draw necessary skills in competition with other positions. This means, in effect, that the position must be high in social scale – must command great prestige, high salary, ample leisure, and the like" (Davis & Moore, 1945, p. 244). Whereas the first argument has rightly been criticized, the second argument should not have been neglected, since it includes a notion of market logic, implying an understanding of both supply of and demand for labor.

<sup>50</sup> In many countries the National Medical Association can, and do, influence recruitment into medical schools; which may result in a supply shortage of medical doctors, thereby giving the profession better strength in wage negotiations.

ing, which, for some, eventually may lead to managerial jobs.<sup>51</sup> Thus, some positions are likely to be filled by people on firm-specific job ladders, implying a weaker relationship between (formal) educational qualifications and class location. Also, for jobs within sales and personal services the ED association is weak; which could be related to the non-merit attributes required for a good performance in these kinds of jobs, such as “. . . looking good and sounding right” (Jackson, Goldthorpe, & Mills, 2005). An important question, then, would be which types of work can be expected to grow, versus decline, in different labor markets.

In addition to individual supply and demand for labor, a number of institutional features, such as unionization and professionalization, internal labor markets, occupational segregation and sector of employment play an important part in hiring processes and wage negotiations, a feature of no surprise to economists and sociologists of labor markets, but a surprisingly neglected topic in recent sociological research on social stratification and welfare states.

### 5.5. To summarize

What is the primary concern of cross-national studies of social inequalities? Welfare state researchers have analyzed *differences* between countries, as well as issues that *covary*, such as their social insurance systems, the universality of their provisions, systems of redistribution and relations between vital social institutions (family, state and market).

Cross-national research on social stratification has addressed theories of convergence, such as the theory of industrialism and modernization; which has directed our attention towards looking for *common* characteristics or trends across societies, or for national *specific* features.

We have learned a lot from these studies about social inequality within different welfare states (see Hout & DiPrete, 2006, for a review), and there is certainly more to be gained by pursuing rigorous cross-national analyses. If, however, our goal is to get a better understanding of the generative mechanisms of social stratification, I would suggest that we return to the basic model of stratification, which is an abstract, context-free model of ‘gravity’. The model needs improvements; in particular, it should be developed into a behavioral model, which means opening the ‘black boxes’ (family, educa-

tion, market), which again implies developing the model in terms of its concepts and mechanisms.<sup>52</sup>

Future cross-national studies of social stratification and mobility could also be more attentive to issues that covary across societies. Then, welfare state research would be more useful for cross-national studies in social stratification. Welfare state research illuminates the importance of insight into political regimes to gain a better understanding of social inequality, and we should not forget that politics matters for social fluidity (Erikson, 1990; Grusky & Hauser, 1984).

The future challenges for researchers interested in welfare states and social inequality would be to pay attention both to ‘gravity’ (i.e. developing our theoretical tools), as well as similarities and variation across countries, in order to get a better understanding of social inequality.

## 6. Papers presented in this volume

Against the background of previous cross-national research on social inequality, we invited a few distinguished scholars to contribute with their thoughts on welfare states and social inequality. The authors were given free hands to interpret the key words ‘welfare state’ and ‘social inequality’ as they wanted, since we wanted their individual contributions on this topic.

Beller and Hout (2006) contribute with a paper on welfare states and social mobility, using ISSP data from 18 countries. They separate the countries into four welfare state types, by adding a post-socialist group to the typology developed by Esping-Andersen. In addition, they provide two measures on national educational policy. The authors fit a number of models, and their findings show substantial and interpretable differences among these countries in their patterns of mobility.

Sorensen (2006) asks why the social-democratic countries in Scandinavia appear to have been somewhat more successful than other countries in creating favorable conditions in terms of equality of opportunities for its citizens. Specifically, she discusses family policies and economic inequalities and asks if the Scandinavian

<sup>51</sup> See Kalleberg and Sorensen (1979) for an early overview of labor market sociology. See also Crompton and Birkelund (2000) for two case studies of managers on internal career ladders in banking.

<sup>52</sup> I believe it is fair to say that our understanding of the process of educational attainment is more developed than our understanding of processes within the educational system and the labor market. Breen and Goldthorpe (1997) have developed a behavioral theory of educational attainment and mobility, based on rational action theory. For some purposes, the model could be expanded to include the impact of social network and/or another perspective on the actor. See also Morgan (2002) and Breen and Jonsson (in press) for an extensive development and discussion of such a model.

welfare states have reached a limit in terms of openness. She also argues in favor of more research, in particular, on social mechanisms, as well as the impact of various kinds of resources on mobility processes.

Ultee (2006) addresses three problem shifts in the study of welfare states and social inequality. These shifts involve questions on ‘who gets what and why’? Wout discusses state expenditures on social security, benefit levels for persons in disadvantaged circumstances, and various types of solidarity among people. Common to these questions is a general sociological concern with social cohesion and inequality.

Palme (2006) argues that the key to understanding the welfare state lies in a thorough analysis of its institutional design, in particular the level and distribution of social rights. Using new comparative data, he shows that cross-national variation in institutions and the distribution of social rights is important for understanding how poverty in different population groups should be explained. In the final section, Tranby (2006) discusses the papers in this volume and provides a general comment on research on welfare state and social inequality.

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