

Economic Change, Unequal Life-Chances and Quality of Life

CHANGEQUAL

Final report

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<http://www.cordis.lu/fp6/citizens.htm>, for information on Priority 7 – 'Citizens and Governance in a Knowledge Based Society' under the 6th Framework Programme.

<http://improving-ser.jrc.it/default/>, the database of socio-economic projects funded under the 4th and 5th Framework Programme.

http://europa.eu.int/comm/research/social-sciences/index_en.htm, Social sciences and humanities in Europa

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PREFACE

Within the Research Fifth Framework Programme of the European Union, the Key Action "Improving the socio-economic knowledge base" carried broad and ambitious objectives, namely: to improve our understanding of the structural changes taking place in European society, to identify ways of managing these changes and to promote the active involvement of European citizens in shaping their own futures. A further important aim was to mobilise the research communities in the social sciences and humanities at the European level and to provide scientific support to policies at various levels, with particular attention to EU policy fields.

The Key Action Call "Improving the socio-economic knowledge base" had a total budget of 155 Million of Euros and was implemented through the launch of three Calls for proposals. As a result, 185 selected projects for funding have started their research work between 1999 and 2002, involving more than 1600 research teams from 38 countries.

At least half of these projects are now finalised and results are (being) systematically published in the form of a Final Report.

The Calls addressed different but interrelated research themes which have contributed to the objectives outlined above. These themes can be grouped under a number of areas of policy relevance, each of which are addressed by a significant number of projects from a variety of perspectives.

These areas are the following:

- Societal trends and structural changes;
16 projects, total investment of 14.6 Million Euro, 164 teams
- Quality of life of European Citizens,
5 projects, total investment of 6.4 Million Euro; 36 teams
- European socio-economic models and challenges
9 projects; total investment of 9.3 Million Euro; 91 teams
- Social cohesion, migration and welfare
30 projects, 28 Million Euro; 249 teams
- Employment, and changes in work
18 projects; total investment of 17.5 Million Euro; 149 teams
- Gender, participation and quality of life
13 projects; total investment of 12.3 Million Euro; 97 teams
- Dynamics of knowledge, generation and use
8 projects; total investment of 6.1 Million Euro; 77 teams
- Education, training and new forms of learning
14 projects; total investment of 12.9 Million Euro; 105 teams
- Economic development and dynamics
22 projects; total investment of 15.3 Million Euro; 134 teams
- Governance, democracy and citizenship
28 projects; total investment of 25.5 Million Euro; 233 teams
- Challenges from European enlargement
13 project; total investment of 12.8 Million Euro; 116 teams
- Infrastructures to build the European Research Area
9 projects; total investment of 15.4 Million Euro; 74 teams.

The work undertaken by the project "CHANGEQUAL: Economic Change, Unequal life Chances and Quality of Life" has contributed primarily to the area "Societal trends and structural changes".

The report contains information about the main scientific findings of the project and their policy implications. The research was carried out by 5 teams over a period of 2 years, starting in January 2003.

The main objective of the CHANGEQUAL Network was to provide an account of the current state of knowledge and the availability of appropriate data in the thematic areas on which the network focused. This exercise was also intended to lay the basis to provide practical guidelines to the steps necessary for future advancement in these related areas. Both of these exercises dealt with the following thematic areas:

- Comparative Analysis of Intergenerational "Inheritance"
- Income Inequality, Poverty and Deprivation.
- Work and Employment
- The Family
- Social Cohesion.

The abstract and executive summary presented in this edition offer to the reader the opportunity to take a further glance on the main scientific and policy conclusions, before going into the main body of the research provided in the other chapters of this report.

As the results of the projects financed under the Key Action 'Improving the Socio-economic knowledge base' become available to the scientific and policy communities, Priority 7 "Citizens and Governance in a Knowledge Based Society" of the Sixth Framework Programme of the European Union for Research and Technological Development (RTD) is building on the progress already made and aims at making a further contribution to the development of a European Research Area in the social sciences and the humanities.

I hope readers find the information in this publication both interesting and useful as well as clear evidence of the importance attached by the European Union to fostering research in the field of social sciences and the humanities.

T. Lennon
Director

SCIENTIFIC REPORT

Abstract

A fundamental objective of the CHANGEQUAL Network was to provide an account of the current state of knowledge and the availability of appropriate data in the thematic areas on which the network focused. This exercise was also intended to lay the basis to provide practical guidelines to the steps necessary for future advancement in these related areas. Both of these exercises dealt with the following thematic areas.

1. Comparative Analysis of Intergenerational “Inheritance”
2. Income Inequality, Poverty and Deprivation.
3. Work and Employment
4. The Family
5. Social Cohesion.

Social cohesion arises as an issue in both EU regional policy and social policy primarily in the context of references to socio-economic disadvantage. At one level, the interest in this issue may be read as a reflection of a moral concern for the plight of the deprived. Social inclusion and equity between individuals or regions may be held to be good things simply on normative grounds and may be considered as fitting objectives of policy on that basis. This usage of the term social cohesion is consistent with the broad definition of social cohesion that incorporates the extent of inequalities in life-chances. Our preference has been for defining social cohesion in terms of relational connectedness and a sense of a common membership of a given community. This approach allows one to address the range of issues incorporated in the broader definition but maintains the conceptual distinction between objective and subjective dimensions. This has benefits in terms of conceptual clarity and high lights the need to explore the relationship between individual life-chances and the inter-personal processes of social cohesion on the other.

The State of the Art and Future Research Agenda reports produced by this network, which are available on the Network website, address these issues in a manner that is both comparative and interdisciplinary.

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Section 1: Executive Summary

Introduction

A fundamental objective of the CHANGEQUAL Network was to deliver an Agenda for Future Research. It was also intended that this agenda would direct attention to areas of research where progress was a precondition of evidence-based policy. It is on these issues that we focus in this section. We do so under the same five headings identified in Section 3.

1. Comparative Analysis of Intergenerational “Inheritance”
2. Income Inequality, Poverty and Deprivation.
3. Work and Employment
4. The Family
5. Social Cohesion.

Comparative Analysis of Intergenerational Inheritance

When sociologists study intergenerational “inheritance”, they are referring to the fact, that individuals’ unequal prospects to obtain access to more or less advantageous social positions to a considerable extent depend on the conditions of their social origin and on the resources commanded in the family of their upbringing. Using the term “inheritance” is a loose way to describe the common observation and regular research finding, that children follow their parents footsteps or they tend to literally “inherit” their parents social position as it often occurs in the case of farming or non-agricultural self-employment. In general, these phenomena are studied in the context of research on social mobility, that investigate the extent to which and the mechanisms through which the social position individuals reach in life are associated with the social position held by their parents. The social position is usually conceived in terms of social class or in terms of some measure of social status.

The study of these phenomena is of interest for two main reasons. Classical authors have seen and studied social (im) mobility primarily as a mechanism of *class or status group formation*. The basic assumption is that classes, status groups or other collectivities with some form of socio-cultural or socio-political identity can only emerge and eventually provide a basis for collective action under the condition of achieving a sufficient degree of “demographic identity” in their membership, that is, when they include a kernel of members stable over time. Intergenerational inheritance and social (im) mobility are thus studied to learn whether conditions exist such that social classes or status groups can be expected to form, for which groups this is most likely the case, and which developments in terms of social cohesion or socio-political conflicts can be expected from these processes.

In its later development, research on so social mobility has largely turned into the study of *social opportunity*. It studies the extent of inequality of opportunity depending on individual’s social background and it is interested in the mechanisms that produce inequality of opportunity. In a more macro-sociological perspective the intention is to determine the relative fluidity or rigidity of a society’s class structure and to specify the individual, institutional and societal factors responsible for it. The more the positions persons hold are conditioned by their social provenance, the more rigid and closed is the class structure; the more mobility occurs between social origin and eventual destination the more open or fluid it is.

Given these general research questions it is essential that they be addressed in a comparative framework, comparing either different national societies or societies in the course of their development. For this reason, the State of the Art reports that were produced in the Network on these issues also had a strong comparative orientation, and so do the reflections on the agenda for future research included in this document.

Evidently, the “inheritance” analogy should not be taken too literally. In modern societies, indeed, social positions are only rarely inherited; the son of a farmer may inherit his father’s farm and sons and daughters of parents who run their own business may inherit it. But other jobs are hardly directly inherited from parents. A crucial aim of

research rather is to identify which social mechanisms instead produce the strong association between background and destination under modern conditions. The CHANEQUAL State of the Art reports have elaborated the knowledge available concerning the most important of these mechanisms. The Agenda for Future Research document identifies the lacunae of our present knowledge and sets out the issues that are seen as the most urgent and most promising for future research with respect to the extent and pattern of intergenerational inheritance and the mechanisms through which it is produced.

Intergenerational (im)mobility in the sense of the gross association between parental position and offspring position is considered from two perspectives. These differ with respect to the dimensions of social position that on which they focus. The first pursues the path usually taken by sociologists and focuses on intergenerational mobility and immobility in terms of social class membership. The second concentrates on the dimension of social position usually studied by economists and focuses on income as the crucial measure of social position. Each of the approaches elaborates the next steps that appears most promising from its own disciplinary research tradition. Yet these two bodies of research have never been brought together and it is thus a further important desideratum for research to determine the degree of similarity in patterns of class and income mobility, and furthermore, to examine whether educational attainment or other individual resources play a similar role in shaping both of these. Recent research in both disciplines suggests that it may not, because the income returns to education have often been found to be increasing, while the class returns to education have, in some cases, been found to be declining. The resolution to this paradox may lie in the changing distribution of income across and within social classes. The importance of this research would lie in the light that it could shed simultaneously on two dimensions of inequality and do justice to the fact that inequality is, as has often been noted, a multi-dimensional phenomenon.

In modern societies the core intervening mechanism between individuals social origin and their destination is education. Children in families of different social classes invest in different kinds, amounts and levels of education and they differ in schooling success, leading to substantial stratification of educational attainment by children's social background. Educational qualifications on the other hand crucially shape access to more

or less advantageous positions in the labor market. Detailed consideration has been given to the crucial intervening steps in these the processes that lead to differential educational attainment by social origin and the role different educational qualifications play for the gradual integration of school leavers in the labor market and for the allocation of them to different kinds of jobs and class positions.

Issues related to social mobility are often the object of normative and political discourse and are then often interpreted ideologically, for instance in ways that legitimate social inequalities. At the extreme, unequal rewards are reckoned as deserved as they are assumed to be distributed according to contributions made for the efficient functioning of society. Or it is held that access to class positions of different advantage is merited because it depends on different investments in education, on the acquisition of different qualifications and productive capacities as well as on different effort people invest in work. However, recent research has shown that reality is far from such merit based stratification. A range of strategies and designs for future research are considered, through which we would increase our understanding of the failure of social arrangements to conform to or converge towards a meritocratic ideal.

None of these processes are gender neutral. In particular, labour markets and work careers persist to be strongly gendered. Labour market segregation by gender is at least in part likely to be connected to gender differences in fields of study chosen in education, which, however, have hardly been studied in research so far. These gendering processes have been considered in detail and suggestions offered of future research directions that could profitably be pursued in order to obtain a better understanding of gender differences in labour market outcomes and intergenerational inheritance.

Income Inequality Poverty and Deprivation

Even prior to EU enlargement, a large body of literature has argued for a need to move from a focus on income poverty to a concern with social exclusion and from a unidimensional to a multidimensional perspective. The Laeken common indicators of social inclusion, which now play a central role in monitoring the performance of EU member states in promoting social inclusion, relate not only to poverty and inequality measured in terms of income, but also to areas such as educational disadvantage, health

inequalities, and unemployment. So a multi-dimensional approach to monitoring progress in relation to poverty and social exclusion has now been formally incorporated into EU processes, as it has been to a greater or lesser extent in many of the member states. The multi-dimensional indicators in question are each presented at country (or regional) level.

Our review of the state of the art in this area suggests three topics as immediate research priorities. The first is that there are areas not covered or inadequately captured by the current set of common indicators, such as housing and homelessness, where research can make a substantial contribution to the development of indicators that have sound conceptual underpinnings. A second issue which merits attention is how best to assess whether things are getting better or worse overall, since different indicators may well move in different directions and some may be considered more important than others. One could of course summarize across dimensions to produce a single summary index, but the approach adopted to date has been to eschew such an overall “score”. Such indices are in any case arbitrary in fundamental and unavoidable ways, but this means that some alternative mode of assessment needs to be developed, again within a conceptual framework rather than simply in an *ad hoc* fashion. A third issue relates to the relationship at individual or household levels between the different dimensions. We need to know much more empirically about whether those who are disadvantaged on one dimension are also disadvantaged on a range of other ones, or whether some indicators actually identify a group experiencing a very particular form of disadvantage or exclusion but not generalised deprivation. Implicit in the notion of multi-dimensional measurement of social exclusion is the assumption that there is no one ‘true’ indicator of the underlying concept. Instead we have a sample of indicators that tap different aspects of a complex phenomenon. If we are to move beyond the accumulation of a mass of descriptive detail we need to develop a measurement model that enables us to understand the manner in which our indicators are related to the latent concept.

It has now been recognized that the objective of greater social cohesion can only be made concrete at EU level by setting targets for the reduction of poverty and social exclusion, similar to those that have evolved in the macro-economic and employment fields as part of the Maastricht process and the Employment Strategy. Social inclusion will only be given the same weight as employment and the macro economy in EU and

national decision-making processes when such targets are in place. The Barcelona European Council in 2002 invited Member States to set targets, in their National Action Plans, for significantly reducing the number of people at risk of poverty and social exclusion by 2010. The next stage of the process could well be the setting of EU-wide targets.

A priority for research is thus to address the issues which have to be faced in framing such targets. For example, would it be better to have

- A common target for all Member States (e.g. poverty risk down to x per cent in all countries);
- An overall target for the European Union, set in terms of the poverty rate for the EU as a whole (the proportion of the total EU population at risk of poverty);
- Different targets for each Member State, but aimed at reducing poverty to zero;
- Member States asked to emulate the best performing Member States.

Seeking to set ambitious but achievable and appropriate targets also represents a research (as well as political) challenge because it may often be difficult, in the current state of knowledge, to decide what is realistic. Comparative research has a key role to play here, with the best-performing countries in particular domains serving to demonstrate what can be achieved. Initial conditions in each Member State and national institutional structures are extremely important, of course, but once again analytic methods such as tax-benefit simulation can help in projecting forward benchmark scenarios against which the level of ambition of targets can be assessed. Research clearly has a major contribution to make in deepening the information base for decision-makers as they grapple with target setting in the social inclusion area.

Work and Employment

In recent decades, the notion of the ‘quality of work’ has come to have steadily wider reference. The major studies between the late 1940s and the 1970s focused primarily on

the issue of changes in skills and task quality. In the main, they regarded the work task as the crucial factor that conditioned people's experiences of the quality of their working lives. But from the 1980s, with the greater turbulence of labour markets, there was an increasing concern with the stability of employment. This in turn gave greater salience to the opportunities that jobs provided for updating skills so that employees were less vulnerable in periods of economic restructuring. Finally, in the 1990s, in part reflecting the growth of women's employment, the concept of job quality was extended further to include the extent to which jobs facilitated or made more difficult the reconciliation of work and family life.

There has been sustained debate in the literature on whether or not there have been clear trends with respect to each of these aspects of job quality. Arguably, by the late 1990s, however, a certain convergence was occurring about the broad outlines of the main direction of change. This combined aspects of the rival optimistic and pessimistic interpretations of the evolution of work that had been dominant earlier. In general, the view was that economic and technological change tended to favour a continuing increase in levels of skill in the workforce. This partly reflected structural change, with the expansion of more highly skilled occupations and partly 'content' change, that is to say a raising of the skill levels of existing jobs. There were thought to be two important implications of the trend to upskilling. The first was that it would lead to an improvement in task quality. In particular, employees would have greater discretion to take decisions at work and work tasks would become more varied and interesting. The second was that, given the rapid changes in technology and the continuous nature of skill change, there would be a marked expansion of in-career training.

However, there was also a dark side to the scenario. Rapid change and the need for more flexible forms of work organisation were thought to be undercutting job security. At the best employers would now offer assistance to ensure 'employability' rather than long-term guarantees of job security. At the same time, the combination of increased competitive pressure and new forms of work organisation, were held to have serious negative consequences in terms of intensifying work. Greater work pressures would take their toll partly in individual work stress. But they also accentuated the problems of managing the interface between work and family life, at a time when the increased

labour force participation of women was raising new issues about how the two could be combined.

The long-term perspective in this scenario was then double-edged. While developments in skill and job interest were improving the quality of work tasks, employment insecurity, work intensification and changes in family structure were markedly raising the level of stress associated with both work and family life.

Our aim in this network is to take a first look at whether there is serious evidence from research in the countries involved in the project that such developments have been occurring. Discussion of trends about the quality of work life often tends to be highly speculative, extrapolating from unsystematic case studies. But a number of countries have begun to develop data sets that provide better grounded indicators with some consistency over time. The European Union has also begun to develop comparative data for member states. An important issue is whether these different studies provide a consistent picture of the pattern of change across countries or whether it varies substantially from one country to another, perhaps reflecting differences in patterns of economic development, in national institutional structures and in the policy preferences of the government and economic elites.

Our State of Art and Future Agenda documents document gives detailed consideration to the following questions. Has been a tendency for skills increase and, if so has changes in the skill requirements of jobs and the skill requirements of individuals have developed in step or rather have led to potentially serious problems of skill mismatch. What is the evidence for change in task quality with respect to task discretion, job interest and work pressure? Has there has been an increase in in-career training and, if so, its consequences for employees work live? What are the trends in employment security? What is the situation in relation to about the problems of reconciling work and family life?

Family

Family and household changes are pivotal in any description of recent changes in European societies. They are of central concern to social scientists because the way the family is organized determines fundamental social relations. As the main locus of early

socialization as well as of social support and intimacy, the family is the most fundamental social institution in modern society

Sociologists and demographers have made significant progress in establishing the correlates of cohabitation and marital breakdown at the individual level, and in many cases the magnitude of these effects. Similarly there has been considerable success in identifying the socio-economic factors associated with women's fertility decisions within individual. However there remain factors for which the empirical evidence is inconsistent. For example, there is some disagreement about the impact of education, premarital cohabitation, and children on the risk of marital dissolution. Researchers have been less successful at explaining the societal level changes or the differences between countries in these processes. For example in relation to divorce rates it has been suggested that, despite the consistency of these socio-economic effects, they are relatively inconsequential for understanding recent increases in rates of marital disruption and the gap in marital disruption rates between blacks and whites'. n considerably less regular than many explanatory theories suggest.'

Reconciling work and family commitments has become a critical issue in European societies. It is also a central goal of European employment policy. Under the traditional male breadwinner model competing demands in the employment and family sphere were managed by a division of labour between the sexes, whereby men were primarily responsible for 'employment' and women were primarily responsible for caring. The growth in female employment and dual earner families, the rise in lone parent families and the ageing population mean that an increasing number of EU citizens now have to combine both caring and employment roles. Much of the focus of comparative research has been on national policies to facilitate work-life balance, but increasingly interest has turned to strategies at the firm level. Flexible working arrangements have been identified as one important means of balancing work and other commitments

There is a strong need for ongoing research on the role of social policies in redefining the work-family system and the balance between income and care needs. European countries have quite different institutional and cultural patterns with regard to the

respective responsibility of family, state and community in the provision of care for dependent persons, and there is a strong tradition of research into these arrangements using both conventional and feminist approaches. It is important to track how these different institutional and material frameworks cope with challenges to existing provision caused by increases in women's labour market participation and the increasing quota of frail elderly in the population. Existing knowledge on welfare state configurations should be supplemented in the light of the rapid developments these two phenomena. Research at this broad level also needs to consider the effects of welfare state restructuring on the balance between family, market and state. The impact of this should be assessed comparatively, but also with regard to different social classes.

At a more specific level there is need for research on how state policies facilitate or hinder different family-work arrangements. While there is abundant cross-sectional macro level evidence on the link between policy provision and labour market behaviour of men and women, there is a need for further longitudinal analyses of these processes and the longer term outcomes within a comparative framework. For example there is a significant literature on the pay penalties experienced by women who take time out of the labour market within individual countries. However comparative work can highlight which institutional settings reduce this penalty and can also provide new insights into the medium and longer-term effects on factors other than pay alone such as career mobility. Further analysis is also needed on the policies that facilitate men's involvement in their families and contribute to a less gendered division of labour in the household. Existing paternity and parental leave is highly varied across countries but some of the factors, which encourage the uptake of leave schemes by fathers, have been identified in national level research

The level of public provision and/or subsidy of childcare is highly variable. However data on childcare is usually collected in national surveys and is generally not harmonised. There is little if any cross-national research or comparative data on the use of informal sources of childcare yet national level studies show that this is an extremely important element of the story. A further issue of crucial concern and for which there is little evidence to date is the quality of childcare in both the formal, regulated childcare sector and the informal, unregulated sector. This is a key issue for child well being and links into the wider concern in family research about including children as stakeholders.

The European Social Survey Module designed by members of the CHANGEQUAL Network team focuses on the relation family and work and is intended to shed light upon the way these are reconciled in different European nations, and how the quality of life of EU citizens are formed by the demands and opportunities stemming from individuals' and households' work and family characteristics. The module addresses issues that are of central importance both for basic scientific research and for EU policy. The module contributes directly to the need for good measures for monitoring both the quality of jobs and social cohesion. It combines the strength of 'objective' indicators for measuring job characteristics, family structure, and welfare with the fundamental importance of indicators of attitudes and life satisfaction, thus revealing how the citizens of Europe experience their jobs, families, and lives in general in the context of their values and preferences. In basic research terms, it provides a means for developing the national traditions of research on these issues by providing for the first time high quality comparative data for the European societies. This is a precondition for any rigorous analysis of the implications of institutional and policy differences between countries for the quality of life of their citizens.

Social Cohesion

A concern with the relationships between objective and subjective phenomena is again seen in our discussion of social cohesion. In attempting to integrate EU Social policy and regional it is useful, we argue, to focus on the concern with social cohesion that spans both and that offers the potential for a conceptual and empirical link between them. Social cohesion arises as an issue in both EU regional policy and social policy primarily in the context of references to socio-economic disadvantage. At one level, the interest in this issue may be read as a reflection of a moral concern for the plight of the deprived. Social inclusion and equity between individuals or regions may be held to be good things simply on normative grounds and may be considered as fitting objectives of policy on that basis. This usage of the term is consistent with the broad definition that incorporates the extent of inequalities in life-chances. Our preference, however, is for defining social cohesion in terms of relational connectedness and a sense of a common membership of a given community. This approach allows one to address the range of issues incorporated in the broader definition but maintains the conceptual distinction between objective and subjective dimensions. This has benefits in terms of conceptual clarity and high lights

the need to explore the relationship between individual life-chances and the inter-personal processes of social cohesion on the other.

A recent research using data from the European Quality of Life Survey provides an illustration of how these issues can be empirically addressed by using latent class methods to develop a measure of vulnerability to economic exclusion that takes into account not only relatively low income but also current life-style deprivation and experience of economic strain. Having done so, and established regional variations in the risk and patterning of vulnerability, it proceed to consider how economic exclusion defined in this relatively restricted sense is associated with wider patterns of social exclusion incorporating factors such as health, housing and environment and the extent to which this varies by region. Finally, it addresses the issue of the impact of economic exclusion on social cohesion and the extent to which regional variations in such cohesion can be accounted for by corresponding variations in levels of economic exclusion and in the consequences of such exclusion

Despite a large body of descriptive evidence on persisting ethnic disadvantages there has still been little empirical research in Europe trying to uncover the basic mechanisms through which ethnic inequalities seem to be reproduced. Theoretically, a resource-oriented perspective offers a fruitful framework: social resources being defined here as certain capital produced and used within specific social, institutional and cultural contexts. Following the classical distinction of Bourdieu it seems promising to differentiate between economic capital, human capital, cultural capital and social capital thus emphasizing that a mere economic approach resting only on economic and human capital may be insufficient to understand many migration and integration phenomena. While these well-known concepts are relevant for research on social inequality in general, in migration and integration research the issues of the generalisability and transferability of capital, as well as interrelated issue of investment efficiency is of central importance.

Urban spatial segregation and its implications for social inequality and cohesion are topical issues in European social research and social policy debate. Yet the foundations for work in this area are weak. The quantitative bases for measuring urban spatial segregation are more fragmented and diverse than in the United States, the home of this

kind of research. In consequence, it is difficult to establish how much spatial segregation there is in European cities, much less examine what its causes or consequences might be. When one recalls that even in the United States robust causal findings have been slow to emerge from the very large body of research in this area, the prospects that similar findings might emerge in Europe are not promising.

This is not to say that research in this area in Europe has no value. The limited work so far carried out points to the conclusion that European cities do not have racial ghettos of a type similar to the black ghettos found in the US. This finding should caution us against extrapolating from American research in order to make statements about the spatial aspects of disadvantage in European cities. It is also possible from existing European work to frame interesting hypotheses about mechanisms, which might connect urban spatial segregation with other aspects of urban disadvantage. These hypotheses suggest that efforts to strengthen the data and research base in this area could be worthwhile, even if it is difficult at present to see how progress might be made in that direction.

Similarly we think that many of the criticisms of the concept of social capital are telling and justify a cautious approach to the field. They require a measure of scepticism about the larger claims made on behalf of social capital and, from a policy point of view, a concern not to overstate the potential added value of interventions based on a social capital approach. In a research context, they also require that care be taken with the conceptualisation of social capital, with the indicators and measures used to operationalise it, and with the analytical methods used to test for causal effects.

At the same time, social capital is such a ubiquitous and popular concept it is hard to avoid and should be incorporated into research. Research on social capital is potentially rich both as a way of countering what is arguably an overemphasis on individuals in much economic literature, and as a means of capturing some of the complexities and interrelatedness of the modern world. In addition, there is a growing body of European data, which could be bought under a social capital heading. Possible directions of future research could include: measurement of social capital, its distribution across social groups, its determinants at individual, group and societal levels, the role of bridging and bonding associations and the implications of a movement towards an e-society.

Section 2: Background and Objectives of the Project

Despite widely varying national policies the governments of most states in the European Union conceive of the improvement of the quality of life of their citizens as one of their central objectives. Furthermore, a distinctive aspect of the 'European project' has been the importance it has attached to the values of self-realisation and social welfare. Yet there is very little well-grounded research on current differences in the quality of life between countries and there is no established research infrastructure for measuring change over time. We have then no adequate way of assessing which types of policies are succeeding in their objectives with respect to long-term improvement in the quality of life.

The need for improved research arises from a growing concern that earlier assumptions about the determinants of the quality of life were either incorrect or have become incorrect as a result of social and economic change. In the early post-war decades it was widely believed that the key to improving the quality of life was economic growth at the individual level. However, it is now clear that under certain conditions, economic growth may have aggregate consequences that undermine the quality of life. Furthermore, higher levels of personal income do not necessarily generate a greater sense of individual well-being. It is essential to monitor directly trends in different dimensions of the quality of life and develop an understanding of their potentially distinct determinants. In particular, much more detailed knowledge is needed of the relationship between economic growth, institutional structures, values and well being.

The objective of the CHANGEQUAL proposal was to develop a network that would improve our capacity to conduct comparative interdisciplinary European research on economic change, inequality of life-chances and quality of life. It sought to assess the current state of research on these issues and compare systematically the research findings that have emerged in the different countries. It further sought to clarify the major methodological issues confronting comparative European research on these issues. These steps will provide the basis for a specification of the key research requirements for improving the knowledge base on these issues of major policy significance. The activities to be undertaken under this contract were intended to initiate a process that

would result in an extended network, which could develop a successful proposal for the development of a European Network of Excellence under the Sixth Framework Programme.

Section 3: Scientific Description Of the Project Results and Methodology

Introduction

A fundamental objective of the CHANGEQUAL Network was to provide an account of the current state of knowledge and availability of appropriate data in the thematic areas on which the network focused. This exercise was also intended to lay the basis to provide practical guidelines to the steps necessary for future advancement in these related areas. In this section we will concentrate primarily on the former while in section 4 relating to *Conclusions and Policy Implications* we will focus more on the later. Both of these exercises dealt with the following thematic areas.

1. Comparative Analysis of Intergenerational “Inheritance”
2. Income Inequality, Poverty and Deprivation.
3. Work and Employment
4. The Family
5. Social Cohesion.

We should note that to conform to the prescribed length for this document we have not included details of the references referred to in this section and in section 4. Full details of these references can be found in the accompanying document relating to a Future Research Agenda, which will also be available on the network Website

Comparative Analysis of Intergenerational Inheritance

The Comparative Study of Social Mobility

In the study of social mobility an important distinction is drawn between observed patterns of social mobility, sometimes referred to as ‘absolute mobility’, and social fluidity. Absolute mobility is concerned with patterns and rates of mobility, where

mobility is understood simply as movement between class origins and class destination. Social fluidity concerns the relationship between class origins and current class position: specifically it is based on the comparison, between people of different class origins, of their chances of being found in one destination class rather than another. If these chances were the same regardless of origins then the mobility table would display perfect mobility: the class in which a respondent was found would not depend of the class in which she or he was brought up. Social fluidity is often interpreted as an index of equality in the chances of access to more or less advantageous social positions between people coming from different social origins, and contemporary research on social mobility accordingly pays much more attention to social fluidity than to absolute mobility.

Goldthorpe (2003) has pointed to the advances that have been made in this area over the past few decades, particularly in terms of data concepts and analysis, empirical findings and theory. On the other hand, it is clear that, particularly with respect to the last two of these, important questions remain unresolved by empirical analyses and many findings remain poorly, if at all, explained.

Developments since 1990 in the study of social mobility and educational inequality have been characterized by a cumulative growth of knowledge alongside persisting disagreements. Among the most robust findings of stratification research are that origin effects are stronger at earlier than later educational transitions; that education mediates a substantial part of the association between origins and destinations; that women display more social fluidity than men; that the pattern of social fluidity is overwhelmingly shaped by inheritance, hierarchy and sector effects and that European countries are now much more similar in their patterns of absolute mobility than they were 25 or 30 years ago. But there have been conflicting findings concerning the degree of cross-national variation and change in both the origin-education and the origin-destination relationships. In the former, the conclusion of almost no change reached in the Shavit and Blossfeld (1993) study has been contradicted by later analyses, while Breen's (2004) edited collection disagrees with Erikson and Goldthorpe's (1992) picture of approximate cross-national constancy in social fluidity. How might these be reconciled? First, studies that find no differences have often been based on smaller samples in which it is difficult to reject the null hypothesis. Second, more recent studies have made use of more

powerful tests of change, especially the unidiff model. Thirdly, in some cases the data refer to different time periods: that used in Breen (2004) comes from the last three decades of the 20th Century whereas Erikson and Goldthorpe's data mainly come from around 1970.

Intergenerational Income Mobility

The intergenerational association between parents and offspring's socio-economic success has always fascinated social scientists. Within sociology there is a long tradition to study such associations using social class or occupational prestige as measures of socio-economic success. More recently, economists have entered this field of research using labour earnings or income as success indicators. Economists' interest in this field of research got a spurt in 1992 when two US studies by Gary Solon and David Zimmermann were published in the same issue of the most prestigious economics journal, the *American Economic Review*. Solon and Zimmermann used two different data sets but both estimated father-son earnings correlations above 0.4, a markedly higher number than in previous studies.

This new literature has focused on long-run earnings. The reason is that annual earnings are affected by transitory factors, so the intergenerational association of annual earnings would be misleadingly low. Most research has focused on fathers and sons. This is a most unfortunate gender bias in the literature. But, due to mothers' intermittent labour force behaviour up to the 1960s, it is quite problematic to measure their long-run earnings in a reliable way. Finally, we note that these intergenerational associations should not necessarily be given a causal explanation. They only measure the degree of association between outcomes in two generations.

A number of recent estimates of intergenerational father-son elasticities. Swedish estimates range from .13 to 0.28. Although the standard errors of these estimates are non-trivial, the discrepancy also reflects alternative approaches to measuring long-run earnings and sample criteria. The two Finnish estimates are basically in the same ballpark, whereas the Norwegian study got even lower estimates. United States and United Kingdom have the highest estimates, well above 0.4. A recent study by Mazumder (2002) suggests that these U.S. estimates might be too low. The two

German studies provide ambiguous results, but a higher weight on Wiegand's study would indicate a somewhat higher elasticity than in the Nordic countries. The estimate from the Canadian study is interestingly closer to the ones for the Nordic countries than to the U.S. and U.K. ones.

Transitions from Education to Work

With the transition from school to work one generally refers to the stage in life in which individuals conclude education and enter in their first job in the labour market. This stage is a crucial one, since individuals' later career progression and location in the class structure strongly depend on their initial position in the labour market. It is certainly recognized, that social origin and other circumstances also affect the course of individuals' later work careers, but with education and first job the contours of the future class destiny of most individuals are largely set.

Over the past decades, embarking on working life became more varied and less standardized, at least in comparison to the relatively smooth transitions from full-time education to full-time employment typically experienced by young men during the post-war economic boom. Partly due to higher levels of unemployment, transition processes have been prolonged: It takes young people longer to establish themselves in the labour market. Between leaving full-time education and arriving at a stable position on the labour market, young people may experience extended or repeated episodes of unemployment, joblessness or attachment to marginal forms of employment. More frequently than before, they return to education or training and pass through successive schooling and working episodes.

With the transition from school to work becoming a more varied process the research agenda turned into a differentiated research programme of its own reaching clearly beyond the earlier concerns. Research has moved away from the analysis of a single step of leaving school and definitively entering into a first job, which then defines the individuals own (first) class position with which positions later in his job trajectory may be compared. Research became reoriented into the study of the gradual integration of school leaving cohorts into the labour market analysing the complex processes during the sometimes lengthy period of time between the end of individuals' primary

involvement in education or training and their stable settlement in a work position. Class allocation or status attainment in the first job is just one element of a much broader research field.

Among the theoretical models aimed at understand job allocation processes and the role of education in these processes matching models have proven most useful. They try to explain the outcome of decisions of two contracting actors – in the case of transition studies: school leavers and employers. Each attempts an optimal solution, given their preferences he has and the opportunities that are available. Education plays a crucial part in the matching process. On the one side, employers can be expected to recruit those applicants they consider to be both most productive and least costly for the kind of work required by the job. Qualifications obtained in education and training are an important signal employers use to select candidates. On the other side, workers are looking for jobs in which they can make good use of their investments in education and training.

Matching models are useful because they take supply and demand conditions into account at the same time. In principle they can also accommodate the school leaver's position in the competition with more senior and more experienced workers on the market. For reasons of parsimony one should assume that the general mechanisms that lead to matches between an individual school leaver and a job or a series of successive jobs are basically the same in different (economically advanced) countries. Research shows much similarity in these basic mechanisms. The institutional and structural conditions under which decisions are made by individual actors, however, can vary substantially over time and between countries, and this can lead to substantial differences between countries in the resulting patterns of transition from school to work. In order to understand such differences, one needs to study the *interplay* between the contextual conditions in which decisions are made and the aims, resources and mechanisms that guide the decisions of individual actors. The study of the institutional arrangements in which the transition from education to work takes place has therefore become an important area for research. Recent research has focused on several of these components:

Educational Institutions and their relatedness to the Labour Market

One crucial factor that shapes the matching of individuals to jobs evidently is the level of education they have obtained. The higher the level of education achieved the more favourable outcomes are in practically all aspects of the transition process (time needed to find employment, unemployment risk, class position, status or prestige of jobs obtained, income, autonomy in work, stability of employment, job security). Still countries vary in the extent to which this is the case. Research has basically pursued two ways to account for such variation. First, in addition to level of education one has examined the role played by different kinds of education (general vs. vocational) and the different contexts and social forms in which education is provided (school based vs. workplace based vs. combinations of both in the form of dual system apprenticeships). Secondly, one has studied systemic characteristics of educational systems (e.g. their level of standardization, stratification, occupational specificity, or their degree of relatedness to the labour market for instance through corporatist participation of employers in designing training curricula). Patterns of transition prevailing in a country, first of all depend on the composition of opportunities for different levels and types of education that are provided in the national educational systems. But they also depend, even though to a lesser degree, on the systemic characteristics of the institutions for education and training (Müller/Gangl 2003).

Labour Market Regulations

Labour market regulations include rules concerning the terms under which workers can be contracted and work contracts can be dissolved. Probably most significant is their impact on employment chances and unemployment risks as they affect the willingness of employers to hire new workers and the security of employment once a job is found. Research has elaborated both positive and negative effects of such regulations on youth employment chances. On the one side, forms of collective, corporate agreements can generate economically viable institutional structures of youth labour market integration. On the other side, worker protection regulations can also have negative side effects, as they often protect workers against outside competition, generate insider-outsider situations and reduce the dynamics of labour markets and of job finding rates (see e.g. Gangl 2002b). Given the lack of work experience, youth entering the labour market can

be affected in especially negative ways as exemplified by the extremely high levels of youth unemployment in some countries of Southern Europe.

Educational Supply and Demand

Another important condition that shapes the transition from education to work is structural. It derives from the degree of balance or imbalance between the qualifications held by school leavers and labour market entrants on the one side, and those demanded on the labour market, on the other side. The relation between supply and demand shapes both employment chances of groups of workers with specific qualifications and the economic and social returns to acquired qualifications. The concern with reaching a fitting balance between supply and demand of qualifications has been especially discussed and studied in the context of the recent expansion of higher education. Educational expansion may lead to processes of displacement from the top as graduates with higher qualifications enter into jobs previously held by less qualified workers. Various studies have been pursued to assess the consequences of imbalances between supply and demand of qualifications (Boudon 1974; van der Ploeg 1994; Erikson/Jonsson 1996, Sofer 2000). Gangl's (2002a) study of the interrelated dynamics of educational expansion and of the more or less parallel upgrading of the occupational structures is particularly significant as it provides a methodologically highly sophisticated and encompassing coverage of recent developments in a large set of European countries. A growing body of literature has examined the issues in view of potential 'overeducation' and its likely consequences (see e.g. Büchel/de Grip/Mertens 2003)

Active Labour Market Policies and Youth Programmes

Faced with rising youth unemployment in the early 1980s, several countries, notably France and Britain, developed a broad array of programmes designed to assist youth transitions into the labour market through various blends of job search assistance, work experience, remedial education and vocational training. In Britain, active labour market policies for youth focused on the Youth Training Scheme and its subsequent variants,

while France has built up several different kinds of programme and specific youth contracts that serve different goals and various target groups (Werquin 1999 for). As participation in youth schemes has become more and more institutionalised over time, they nowadays constitute an important element of youth transitions in Europe, particularly among the less qualified and disadvantaged youth. While the different programmes clearly aim to increase educational participation, employment, job stability and wages among the more disadvantaged youth, the empirical evidence as to how far the programmes actually have achieved these goals is still disputed and essentially an open question, although in general terms the scant evidence on European programmes seems to differ favourably from the bleaker U.S. evaluation results (Ryan 2001; Heckman et al. 1999).

Meritocracy

In trying to explain differences in relative rates of class mobility, sociologists have traditionally concentrated on individuals' educational attainment (Heath *et al.* 1992; Marshall *et al.* 1997), and, more recently, on their basic levels of ability and effort (Saunders 1997; Breen and Goldthorpe 1999). According to one influential theory, the 'liberal theory of industrialism', modern societies should be characterised by a move from ascription to achievement when allocating occupational positions. Thus, ascribed characteristics, such as those that people acquire more or less automatically as a result of family background, should be diminishing in importance in the face of an emphasis on achieved characteristics related to individual merit, such as educational qualifications. In modern industrial societies, therefore, merit should become the principal determinant both of the individual's access to education and of their subsequent position within the social division of labour (the 'IMS' hypothesis, labelled by Jonsson, 1996; Parsons 1954; Blau and Duncan 1967). Ascriptive characteristics should be irrelevant to both of these processes.

According to the liberal theorists, as societies modernise:

? the association between class origin (o) and educational attainment (E) weakens. The development of mass educational systems allows talented

individuals from all class backgrounds to have equal chances of achieving qualifications.

? and as a result of these changes, the association between class origin and class destination (D) weakens. Controlling for education, the O-D link should progressively vanish. As mediated by education, the association between O and D should fall to the level set by cultural and genetic effects of O on IQ and effort (which E cannot modify).

However, the empirical evidence is, on the whole, not supportive of the liberal theory of industrialism (see Whelan and Layte, 2003, for a summary of the relevant research). Modern industrial societies are not meritocracies – different levels of education cannot explain away differences in relative mobility chances. These factors are important, but even after controlling for education significant inequalities remain to be explained. Something other than the ‘merit’ variables identified in the thesis of industrialism is working to create and maintain the inequalities we see in relative mobility chances.

Educational Stratification Studies

Over the twentieth century dramatic increases in the supply of formal education have occurred for successive birth cohorts in industrialised societies, i.e. these societies have been characterized by a considerably enlarged *distribution* of schooling. In most of them, educational reforms have also been implemented during the second half of the century to provide children from all social backgrounds with increased education and to promote equality of educational opportunity. Sociologists have therefore tried to assess whether or not educational attainment has gradually become less dependent on ascriptive individual characteristics (especially social origins) and whether or not a less unfair *allocation* of schooling has progressively emerged in modern societies.

The dynamics of socio-economic inequality of educational opportunity in modern societies is a research question with a long-standing interest in sociology that has been studied using various conceptual and quantitative frameworks. Till the end of the 1970s

the *linear regression model of educational attainment* was the unique approach. Using a metric dependent variable to measure the final amount of schooling, the first period typically answered the following research question: what has been the change over time in the effect of social origin variables on the mean number of school years completed? Over the years it has become more and more acknowledged that the enlarged distribution of schooling in modern societies has resulted in a historical decline in the dependence of educational attainment on social origins, as evaluated with linear regression models.

The second period of educational stratification research began in 1980 with the proposal of the sequential logistic regression model of educational transitions. Decomposing the intrinsically discrete and sequential nature of an educational career in a series of successive branching points, this model assesses the net effect of social background variables on the odds of “surviving” each specific transition. With this model it has widely been observed that social origin effects decline steadily from the earliest school transitions to the latest. This result has often been attributed to a process of differential selection: from the earliest to the latest school transitions, differential dropout rates systematically reduce heterogeneity between children from different social origins on unmeasured determinants of school continuation such as ability or motivation, and because of the correlation between these variables and social origins greater homogeneity on unmeasured factors at higher levels of schooling reduces the effects of observed social background variables. According to a related argument, as educational expansion increases the proportion of the total population “at risk” at a given transition, its heterogeneity on unmeasured determinants of school continuation grows and, as a consequence, the effects of social background variables on the odds of surviving that transition are likely to increase across cohorts.

As regards temporal change in inequality of educational opportunity, the linear regression model of highest educational level attained and the sequential logistic regression model of educational transitions may tell us different, albeit reconcilable stories. While the latter is only sensitive to the relative allocation of schooling between social groups (because associations estimated under logistic response models are invariant under changes in the marginal distributions of the variables), the former is also affected by the marginal distribution of schooling and change in it, notably increased average educational level as a consequence of educational expansion. It might thus been

said that, while the linear model provides a general picture of temporal change in the dependence of educational attainment on social origins, the sequential logistic regression model yields a more structural or “pure” measure of inequality of educational opportunity as it is unaffected by historical change in the marginal distribution of schooling. This provides an understanding of its impressive centrality in comparative educational stratification research over the last two decades which also comes from the fact that the discrete model corresponds to the way persons accumulate formal schooling, namely, in a sequence of irreversible steps. However, recent research has scrutinized several (sometimes severe) limitations of the educational transition model, especially the extent to which the estimations it yields are affected (and biased) by unmeasured heterogeneity. To cope with this important issue, a defensible strategy is to include “a lengthy, theoretically defensible set of covariates” (Lucas, 2001: 1660) in the statistical model.

Gender, Education and Labour Market Outcomes

Educational Attainment Patterns

Recent decades have seen an expansion in educational attainment among young women to the point where female educational attainment surpasses that of young men in many European countries (Müller and Wolbers, 2003; OECD, 2002). As a consequence, the policy debate, at least in some countries, has shifted from a focus on female educational 'disadvantage' to a concern with 'failing boys' (see, for example, Epstein et al., 1998). Drawing on a rational choice perspective, Breen and Goldthorpe (1997) attribute declining gender differences in educational attainment to a convergence in the pattern of returns to education for women and men due to increasing female labour force participation. While this may be a plausible explanation of the direction of educational trends, as currently formulated it does not explain cross-national variation in the pattern of change or allow for circumstances in which female educational expansion pre-dates increasing labour force participation (Crompton and Sanderson, 1990). Country-specific accounts of gender and educational expansion have, in contrast, focused on the specific institutional features of the educational system (including curriculum content and approaches to assessment) along with micro-level school processes as factors shaping gender differentiation in educational attainment (see, for example, Arnot, 2002; Tinklin

et al., 2001). The latter approach would appear to provide a useful way of applying the Erikson and Jonsson (1996) framework to gender differences by disentangling the different opportunities and constraints faced by young women and men in making educational decisions.

These differences in the kinds of courses taken by male and female students have been viewed as reflecting the difference between occupations, and hence fields of study, in facilitating potential career interruptions for child-rearing (Breen and Goldthorpe, 1997) and/or as the outcome of different comparative advantages for males and females in particular subject areas (Jonsson, 1999). However, Jonsson (1999) found that such comparative advantage differentials account for only a small proportion of the educational segregation by gender found within secondary education. Nor does this approach explain why gender differences are still apparent within very specific fields of study. Feminist theorists view educational segregation as reflecting the gendered nature of different types of knowledge with many accounts focusing, for example, on the construction of scientific and mathematical subject areas as 'male' (Kelly, 1985). However, such explanations tend to neglect the way in which the gender-typing of subjects can vary over time and between societies. A more useful approach would appear to involve a greater focus on the institutional context within which young women and men make educational. Studies in the sociology of education have identified a broader set of factors, which may influence choice of field of study, including school organisation and process, peer influences, curricular content and teaching methods (Dryler, 1999; Dekkers, 1996; Smyth and Hannan, 2002). In addition, current occupational segregation by gender within employment could be regarded as part of the context within which subject choice is framed.

While gender differences in field of study have been well documented, relatively little attention has been paid to potential differences in field of study by social class background. In the US context, Davies and Guppy (1997) found that both males and those from higher socio-economic backgrounds were disproportionately represented in the more lucrative fields of study within selective tertiary institutions. Van de Werfhorst et al. (2000) indicate significant gender and social background differences 'field resources' (the types of skills and knowledge acquired through a field of study) but suggest that the impact of different dimensions of parental background differs by field.

The cultural aspects of the home environment shape entry to the cultural and communicative fields while entry to the economic and technical fields reflects a more direct intergenerational transmission.

Gender Segregation in the Labour Market

If gender differences in intergenerational mobility patterns are primarily related to gender segregation within the labour market, it is necessary to broaden the analysis to consider the nature and possible causes of such segregation. Occupational sex segregation has been found to vary across countries and over time (Blackwell, 2001). However, much attention has been focused on the appropriate measure of occupational segregation (Siltanen et al., 1995) with comparatively little concern with explaining cross-national variation in the patterns discovered. Buchmann and Charles (1995) propose that where educational choices are made at an early age, they are more likely to be gender-typical and that this feature, coupled with strong education-labour market linkages, means that segregation is likely to be more pronounced in countries with highly differentiated, vocationally-oriented systems. This hypothesis is given tentative support by analyses of twelve European countries, which indicate that countries with higher levels of educational segregation by gender tend to have higher levels of occupational segregation in the early labour market career (Smyth, 2002). However, even within the same field of study, young men and women often enter very different occupations (Smyth, 2002). From a human capital theory perspective, occupational segregation is taken to reflect the fact that women choose jobs, which will not penalise labour market discontinuity (Mincer and Polacheck, 1974). However, this perspective has generally not specified the empirical relationship between 'penalties' for interruptions and (changes in) the feminisation of particular occupations. In fact, research from the United States indicates that women in predominantly female occupations do not experience lower wage depreciation as a result of career interruptions than those in male-dominated occupations (Marini, 1989). Initial formulations of the institutional perspective (Maurice et al., 1986) have been criticised for being 'gender-blind' (O'Reilly, 1996) and analysis of national systems from a gender perspective have tended to focus more on overall levels and patterns of female labour force participation rather than gender differences in types of employment. However, an exploration of the institutional context within which employment patterns are formed would appear to represent a useful direction in

explaining labour market segregation (Rubery and Fagan, 1995; Buchmann and Charles, 1995). A full exploration of the interaction between a differentiated labour supply and a differentiated demand for labour on the part of employers has been hindered by the lack of information on the attributes sought by employers in recruitment to particular types of jobs. Studies of the factors shaping segregation have been carried out in particular occupations and industries (see, for example, Scott, 1994) but have not yielded a satisfactory framework for wider analysis. This issue is not just of relevance to the analysis of employment segregation but has wider implications for our understanding of social reproduction (see Erikson and Goldthorpe, 2002).

Income, Inequality, Poverty and Deprivation

In outlining out a set of priorities for research under the general thematic heading of income inequality, poverty and deprivation, five sub-themes have been selected and these are:

- 1) Income Poverty Dynamics
- 2) Multi-Dimensional Measures of Social Exclusion and Disadvantage
- 3) The Dynamics of Low Pay
- 4) Income Inequality
- 5) Indicators and Targets for Social Inclusion in the EU

Income Poverty Dynamics

While longitudinal survey data have been available for many years in the USA this type of data has been coming on stream only more recently in Europe. We also now have a picture of the overall scale of low-income persistence versus change in Europe from the European Community Household survey. Eurostat, the OECD, and a number of studies (for example Whelan et al 2001, Layte and Whelan 2002) have recently produced

Figures on income poverty dynamics from the ECHP). These show what the OECD has summarised as the seeming paradox that poverty is simultaneously fluid and characterised by long-term traps. Many spells in poverty are short and represent only transitory set-backs, and considerably fewer people are continually poor for an extended period of time than are observed in poverty at a point in time. On the other hand, the typical year spent in poverty is lived by someone who experiences multiple years of poverty and whose longer-term income is below the income poverty threshold on average. Repeat spells help to explain the apparent paradox of fluidity combined with persistence, since many of those whose exit poverty in a given year re-enter it within a short time. In addition, much of the time spent by such people above the poverty threshold is not very far above it. So the evidence suggests that there is extensive persistence, and that this is greater than just looking at spell exits would suggest.

Econometric modelling of poverty dynamics has also been investigated for some countries, for by example Jarvis and Jenkins (1997) and Jenkins and Rigg (2001) for the UK, Canto Sanchez (2001) with Spanish data, Muffels *et al* (1992) and Leewen and Pannekoek (1998) for the Netherlands, Schluter (1997) for Germany and van Kerm (1998) for Belgium. Comparative analysis of poverty dynamics was pioneered by Duncan *et al* (1993, 1995), comparing the USA and Canada with selected European countries for which panel data was available. Results from the application of such methods to data from the ECHP are coming on stream, notably the OECD study already mentioned, Whelan *et al* (2000), Layte and Whelan (2002), Fouarge and Layte (2003). Such studies generally attempt to link observed changes in poverty status to changes in the earnings, labour force participation and composition of the household. The key distinction made is between income “events”, such as changes in earnings, benefits, investment income and demographic “events” such as the arrival of a new child, partnership formation, death, marital dissolution, or adult offspring leaving home. Their results suggest that labour market changes are more important and household structure changes less important in EU countries than in USA.

Capturing and Modelling Income Poverty Dynamics

The most popular approach to modelling poverty dynamics follows Bane and Ellwood’s (1986) influential US study in analysing the duration of single spells. Event

history/hazard rate models are estimated in order to relate spell exit or entry to income and demographic “events”. These can indeed highlight factors associated with poverty transitions, though not without problems. One relates to what counts as an escape in the light of measurement error in income; Jenkins in his British study treats only those who fall from above 100% to below 90% of the poverty threshold as poverty entries. The rationale is easily grasped but raises very real problems. There are also serious problems in distinguishing a mutually exclusive categorisation of income and demographic events, and in the fact that such events may in fact be endogenous to each other.

Perhaps the core issue though is whether this approach can adequately capture individuals’ experience of poverty over a period of time. Spell repetition is a significant empirical phenomenon, as already noted, but most of these models either examine single poverty spells or, if they have estimated models of poverty re-entry probabilities as well, have not combined the model outputs to examine the implications for total poverty experienced over some period. A study by Stevens (1995) with US data shows how this might be done, but Jenkins points out that this has not been more widely applied and that one explanation is that the derivations are technically demanding. A simple alternative is to focus on a dependent variable defined in terms of “chronic” poverty, and related to characteristics which are either fixed by nature or held constant at their initial values rather than changing over time. Jenkins, in reviewing alternative modelling strategies, is somewhat dismissive of this approach, seeing them as “primarily multivariate descriptive devices”, but this may undervalue their potential contribution. Properly capturing and incorporating poverty incidence, prevalence and spell repetition requires quite long observation periods, but even with relatively short panels we can learn a lot by focusing on the characteristics of those persistently poor.

Multi-Dimensional Measures of Social Exclusion and Disadvantage

While recognising its limitations, economists have always relied heavily on income in measuring command over resources, standard of living, and well being, but there has been an increasing emphasis in recent years on multidimensional measures, at individual and societal level. This arises from concerns that (measured) income is inadequate as a measure of command over resources, but also the need to capture the complex nature of the underlying processes and responses required in tackling poverty and social exclusion.

Despite the continuing vagueness of the term ‘social exclusion’, its main value lies in drawing attention to issues of dynamics and multidimensionality (Berghman, 1995, Room, 1999, Sen 2000). However, there is a tension in the social exclusion literature between an emphasis on heterogeneity of trajectories and, on the other hand, an accumulation of disadvantages involving a ‘spiral of precariousness’ (Paugam, 1996). While no one would wish to deny that social exclusion arises from a variety of processes or that it involves much more than an income deficit, an uncritical insistence on multidimensionality could paradoxically have the effect of obscuring the processes involved in generating social exclusion.

There has been some analysis of the relationship between deprivation and income over time, and regression analysis of the role of both resource and need-related individual and household characteristics such as education, labour market experience, social class, marital status and household structure in explaining deprivation levels (Layte *et al* 2002, Whelan *et al* 2002). However, much remains to be learned about these relationships. The inter-relationships among deprivation items have also been explored using data from the ECHP countries, and distinguishing dimensions of deprivation also opens up a number of fruitful avenues of research. The relationship between low income, either currently or persistently, and deprivation in terms of housing facilities, housing deterioration, and even more so environmental problems has been found to be particularly weak and the factors associated with these forms of disadvantage need to be better understood.

Rather than becoming fixated on trying to identify the “truly poor”, research could usefully employ a variety of different income and deprivation measures, and look in depth not only at the overlapping group of “income poor and deprived”, but also at the distinguishing features of the other three sectors of the income-deprivation quadrant – the “income poor but not deprived”, “deprived but not income-poor”, and “neither income poor nor deprived” – in terms of different deprivation dimensions. It is also useful in that context to introduce a further dimension, investigating how both income and deprivation levels relate to people’s subjective evaluations of their own situation (Van den Bosch 2001, Whelan *et al* 2001)

Measurement Error in Poverty and Deprivation Dynamics

The analysis of Breen and Moiso (2004), Moiso (2004) and Whelan and Maître (2004) shows a general similarity between latent poverty and deprivation dynamics. In both cases all error is captured as change and we substantially overestimate mobility. Distinguishing between different types of reliability shows that by far the largest component of error is associated with overestimation of the probability of exiting from poverty or deprivation. We observe a striking similarity across dimensions at both observed and latent levels. In both cases levels of poverty and deprivation persistence are higher at the latent level. However, there is no evidence that earlier results relating to the differences in the determinants of poverty and deprivation persistence are a consequence of differential patterns of reliability. Taking measurement error into account seems more likely to accentuate rather than diminish the contrasts highlighted by earlier research. Since longitudinal differences relating to poverty and deprivation cannot be accounted for by measurement error, it seems that we must accept that we are confronted with issues relating to validity rather than reliability. Even where we measure these dimensions over reasonable periods of time and allow for measurement error, they continue to tap relatively distinct phenomenon. Thus, if measures of persistent poverty are to constitute an important component of EU social indicators, a strong case can be made for including parallel measures of deprivation persistence and continuing to explore the relationship between them. Future research therefore needs to continue to explore issues relating to reliability using a range of statistical sources including register data, as has recently been done by Basic and Rendtel (2004) and focusing on both income and deprivation sources and explaining the relationship between them. One further major step would be to latent class models to measure an underlying dimension of economic or social exclusion and then model dynamics in terms of this latent variable rather than the components such as income and deprivation used to identify the underlying latent classes.

The Dynamics of Low Pay

Studies of the dynamics of individual earnings throughout the earnings range confirm the presence of a sizable transitory component at all levels (Atkinson, Bourguignon *et al* 1992). However, studies focused specifically on the persistence of low pay are much less

numerous, and most have focused on a particular country (for example Stewart and Swaffield 1997, 1998 and Sloane and Theodossiou 1996, 1998 on Britain, Asplund *et al* 1998 on Denmark and Finland, Contini *et al* 1998 and Lucifora 1998 on Italy). Some comparative results on earnings mobility of low-paid workers have been produced from longitudinal data for selected countries, notably by Keese *et al*'s (1998) OECD study of seven countries and by Salverda, Bazen, Gregory *et al* (2001) comparing four EU countries and the USA, and these represent the point of departure for comparative research on low pay dynamics in Europe.

The OECD study looks at earnings changes over a five-year period from 1986 to 1991 in Denmark, France, Germany, Italy, Sweden, the UK and the USA. When focusing on those in full-time work in both years, it finds considerable movement out of low pay when that is defined as being in the bottom earnings quintile in 1986 – between 50 and 60% had moved to a higher quintile in the earnings distribution by 1991. The study by Salverda *et al* looks at the dynamics of low pay over a two-year rather than five-year horizon for France, Germany, the Netherlands, the UK and the USA. It shows for example that in France and Germany about 40% of earners in the bottom decile in the mid-1990s had risen to a higher decile the next year, with somewhat higher figures for the UK and the Netherlands. The common stereotype of the USA as displaying more mobility was not borne out by these two studies. These studies are based on different longitudinal datasets for different countries, and application of this comparatively perspective to harmonised data for a broader range of countries using data from the European Community Household Panel (ECHP) has a great deal of potential. Cross-sectional analysis of the extent and incidence of low pay from this source shows the same broad variation across countries as the figures from national data sources brought together by the OECD (Nolan, Salverda *et al* 2001). The dynamics of low pay, including movements in and out of employment, are now ripe for investigation in a harmonised way across all the participating EU countries.

Income Inequality

To analyse the factors of inequality, it is useful to investigate the income distribution process (see Hauser 2003). This process ends with “economic welfare”, typically measured as disposable equivalent income, and starts with individual market income, i.e.

gross earnings and gross capital income. In a standard neo-classical model, wages depend only on the marginal productivity of labour, while the productivity of labour depends only on the worker's human capital. Assumptions of the neo-classical model include perfect mobility, absolute information, and perfect capital markets. In reality, of course, the world is more complex. Nevertheless human capital is an important factor of wages, and the distribution of wages is highly correlated with the distribution of human capital. When the assumptions of the neo-classical model are relaxed, further factors come into play: the structure and segmentation of the labour market, discrimination, the power of trade unions, and regional differences in other production factors like capital, environment and public infrastructure. These points have been investigated in depth, both theoretically and empirically. Besides the wage rate, the number of hours worked is obviously also important for the level of earnings. Although much research has been performed on labour supply decisions, its results are seldom used to analyse earnings or income inequality. Also very little effort has been expended to explain the second part of market income: capital income. Key factors for the absolute level of capital income are the distribution of wealth, the age structure, the possibility of amassing and increasing capital and so on. A further question is what factors influence the relative rates of return, like interest rates – such as whether they are dependent on the level of wealth, and whether their effects are different for different groups.

However, analysing the factors of market income is only one part of explaining income inequality in general. To convert gross market income into net equivalent income one has to add social insurance benefits, private transfers and state transfers and to subtract taxes and social insurance contributions. Besides this, it is important to consider that there is income redistribution within the household. Each of these steps leads to another stage of income distribution. Which stages should be investigated and the sequence of these stages depend on the underlying research questions. Thus in some cases it makes sense to add individual social transfers or subtract taxes before analysing redistribution within the household, while in other cases – for example to analyse the effect of state redistribution as a whole – it is more useful to calculate both pre-government income and post-government income as equivalent income. Whatever the specific case, in principle there are two general factors that influence income distribution besides the markets: the family and “the” state.

Usually people live together with others and pool their individual income, at least in part. In addition, the existence of children must be taken into account. Therefore equivalent income must be investigated and compared to individual income to analyse the influence of the household structure. The structure of households, the role of the family, labour market participation by women – especially mothers, and the importance of the traditional breadwinner model are thus further factors important for the distribution of income. Finally, the state influences income distribution. Therefore the system of transfers, the tax system and social insurance are important. To analyse the different impacts of these factors on inequality, one has to calculate inequality measures and poverty rates using the different income concepts and then investigate the changes from one stage of the income distribution process to the next.

In summary, there are three main factors that influence income distribution: the markets, family structures and the state. Furthermore, these three factors affect each other: the labour market influences household behaviour as well as the state, family structures have effects on the labour market as well as on the state, and the tax-transfer system has consequences on household behaviour and the labour market. Thus, it might be that there is high inequality in earnings because of a high level of redistribution within households or by the state. Therefore to get a full impression of income distribution it is important to analyse all of these institutions together.

Besides these more micro-economic analyses it is also necessary to investigate macro factors. Thus, it is still a puzzle how business cycles and growth influence personal income distribution and vice versa. The famous Kuznets hypothesis, which argues that in a growth process inequality will first increase and then later decrease, is still a central point of discussion. However, it is a better explanatory model for developing countries or countries in which growth is the consequence of structural change. In other countries it is unclear, both theoretically and empirically, whether an increase in inequality is necessary for growth or whether – in contrast – higher equality is positive for economic growth.

Indicators and Targets for Social Inclusion in the EU

The commonly agreed and defined indicators of social inclusion adopted at the Laeken European Council in 2001 are to play a central role in monitoring the performance of the

Member States in promoting social inclusion. These indicators are intended to allow the Member States and the European Commission to monitor national and EU progress towards the key EU objectives in the area of social inclusion set by the Nice European Council in December 2000, and to support mutual learning and exchange of good practices in terms of policies

The process of using indicators is necessarily a dynamic one, and there are areas which the agreed EU indicators clearly do not cover or where they are in need of significant development. Major gaps in the areas and topics covered reflect a combination of data unavailability and absence of clear conceptual underpinning in particular areas. Rather than seeing an *ad hoc* expansion in the number and type of indicators, a firm conceptual and statistical underpinning is necessary if these gaps are to be adequately filled.

One important area not currently covered by the agreed indicators is housing: individual Member States in their NAPs/inclusion are to present quantitative information on decent housing, housing costs, and homelessness and other precarious housing conditions, but not in terms of harmonized and comparable indicators. Homelessness is particularly problematic from a measurement point of view, since people who are homeless or living in very precarious and temporary accommodation tend not to be included in household surveys and other statistical data sources. Those living in institutions such as old people's homes, prisons, orphanages are also often excluded from the coverage of household surveys whose focus is generally on private households, and whose situation would have to be captured in a comprehensive set of indicators.

Other areas where there is seen to be a need to develop indicators as a matter of priority include social participation, indicators at local level, indebtedness, access to essential services such as health and education, and health inequalities. While indicators in relation to educational and health inequalities are included in the current set they are widely acknowledged to have serious limitations. As far as education is concerned, substantial progress has been made over the last ten years in developing comparative data on these issues, notably through the International Adult Literacy Survey (IALS), the Trends in Mathematics and Science Study (TIMSS) and the Programme for International Student Assessment (PISA). Another important issue with respect to education is access, and the influence of socio-economic background on that access. Comparing the

educational attainment level of parents and their children sheds some light on this issue and the related one of the intergenerational transmission of educational disadvantage and thus poverty and social exclusion. As far as health is concerned, lack of comparative measures of socio-economic differentials in premature mortality is a particularly serious gap in the knowledge base for indicators of social inclusion. Self-assessed health status by income quintile groups, currently one of the Laeken set, provides a useful starting-point but faces serious problems of interpretation and alternatives need to be developed. Development of measures of quality-adjusted life expectancy (taking prevalence of disability into account), premature mortality by socio-economic status, and access to healthcare are critically important.

Another area in need of development is the use of non-monetary indicators; such indicators have been found to be very helpful as a complement to income in capturing living standards and exclusion at micro- and national levels, as is evident from a variety of national studies as well as from analysis of data for all the EU Member States participating in the European Community Household Panel survey. Ways need to be found to incorporate such indicators into the tracking and understanding of poverty and social exclusion at EU level.

Quality Of Work and Skills

In recent decades, the notion of the 'quality of work' has come to have steadily wider reference. The major studies between the late 1940s and the 1970s focused primarily on the issue of changes in skills and task qualities. But from the 1980s, with the greater turbulence of labour markets, there was an increasing concern with the stability of employment. This in turn gave greater salience to the opportunities that jobs provided for updating skills so that employees were less vulnerable in periods of economic restructuring. Finally, in the 1990s the concept of job quality was extended further to include the extent to which jobs facilitated or made more difficult the reconciliation of work and family life.

There has been sustained debate in the literature on whether or not there have been clear trends with respect to each of these aspects of job quality. Arguably, by the late 1990s, however, a certain convergence was occurring about the broad outlines of the main

direction of change. This combined aspects of the rival optimistic and pessimistic interpretations of the evolution of work that had been dominant earlier. In general, the view was that economic and technological change tended to favour a continuing increase in levels of skill in the workforce. This partly reflected structural change, with the expansion of more highly skilled occupations and partly 'content' change, that is to say a raising of the skill levels of existing jobs. There were thought to be two important implications of the trend to upskilling. The first was that it would lead to an improvement in task quality. In particular, employees would have greater discretion to take decisions at work and work tasks would become more varied and interesting. The second was that, given the rapid changes in technology and the continuous nature of skill change, there would be a marked expansion of in-career training.

However, there was also a dark side to the scenario. Rapid change and the need for more flexible forms of work organisation were thought to be undercutting job security. At the best employers would now offer assistance to ensure 'employability' rather than long-term guarantees of job security. At the same time, the combination of increased competitive pressure and new forms of work organisation, were held to have serious negative consequences in terms of intensifying work. Greater work pressures would take their toll partly in individual work stress. But they also accentuated the problems of managing the interface between work and family life, at a time when the increased labour force participation of women was raising new issues about how the two could be combined. The long-term perspective in this scenario was then double-edged.

Our aim in this network was to take a first look at whether there is serious evidence from research in the countries involved in the project that such developments have been occurring. Discussion of trends about the quality of work life often tends to be highly speculative, extrapolating from unsystematic case studies. But a number of countries have begun to develop data sets that provide better grounded indicators with some consistency over time. The European Union has also begun to develop comparative data for member states. An important issue is whether these different studies provide a consistent picture of the pattern of change across countries or whether it varies substantially from one country to another, perhaps reflecting differences in patterns of economic development, in national institutional structures and in the policy preferences of the government and economic elites.

Skills

Our State of Art and Future Agenda documents document gives detailed consideration to the following questions. Has been a tendency for skills increase and, if so has changes in the skill requirements of jobs and the skill requirements of individuals have developed in step or rather have led to potentially serious problems of skill mismatch. What is the evidence for change in task quality with respect to task discretion, job interest and work pressure? Has there has been an increase in in-career training and, if so, its consequences for employees work live? What is the situation in relation to about the problems of reconciling work and family life?

Reward attainment in the labor market is dependent on how well worker skills are matched with job requirements. Two aspects of skill matching are particularly important from a welfare point of view. First, the psychological payoff of having a high-skill job depends positively on the skills of the worker . At low levels of worker skills, the psychological payoff of job complexity may be zero or negative. Second, both economically and psychologically, the payoff to worker skills depends positively on the skill requirements of the job. At an aggregate level, changes in the distribution of wages are commonly believed to be closely tied to changes in the balance between skill demand and skill supply.

It is well-known that the average level of education has risen significantly in advanced industrial nations in recent decades. Thereis also a wide-spread but contested view that the average skill level among jobs has risen even faster, due mainly to two developments: technological change and globalization. The supposed excess demand for skills is widely used as an explanation for the observed increase in wage dispersion in several countries. The relationship between skill and wage movements is assumed to be especially tight in labor markets with relatively uncoordinated ("flexible") systems of wage determination.

Four distinct but related topics are covered in this section: (a) how the skill requirements of jobs have changed in recent decades, (b) how worker skills, especially education, have changed during the same period, (c) how the quality of job-worker matches with respect

to skills has evolved, and (d) how the distribution of wages, especially the returns to schooling, has changed.

There are three approaches to measuring the skill requirements of jobs: (a) job classification based on some kind of external judgment, (b) self-reported (by the job holder) requirements, and (c) the average or typical education among job incumbents. We focus on (a) and (b) below, since (c) conflates the supply and demand sides of skill (i.e., workers and jobs). Nonetheless, many empirical descriptions revert to (c) for lack of available alternatives. The skills of employees are of two main kinds – general and firm-specific. General skills have two main sources: formal education (schooling) and work-life experience. Firm-specific skills also have two sources: formal workplace training and informal on-the-job training. It appears (a) that the skill requirements of jobs have increased significantly in recent decades (certainly in the UK, the US, and Sweden, and most probably in other OECD countries), and (b) that the supply of skills as measured by the educational attainment of workers has also increased significantly. An important issue is how these two trends are related to each other. In the literature, there are two main strands. The first is the overeducation perspective. The sense that educational expansion was outstripping the demand for skills in the labor market dates back at least as far as the late 1940s. In the wake of the rapid growth of student enrollment at colleges and universities this impression became a wide-spread view in the 1970s and began to be documented empirically. A literature on over-education and earnings started in the early 1980s and has since become substantial. There is by now a large body of international evidence on the incidence and wage effects of over-schooling. Information on trends, however, is very scarce. The second major strand in the literature on skill matching is the upgrading view, i.e., that skill demand is increasing at a higher rate than skill supply (education). The starting point of this perspective was the growth in wage inequality, in particular across skill or education categories, in the United States and Britain.

On average for the group of countries considered here, the period of the 1970s to the 1990s saw an approximate balance between the growth rates in skill demand and skill supply. Disaggregating by individual nations, however, only Ireland exhibits a balance throughout the period. In France, the UK and the US, the change in skill demand tended to outpace skill supply, thus creating (all else equal) an upward pressure on wage

inequality, or at least on returns to education. This excess demand was clearly concentrated to the first half of the period, with a balance subsequently emerging, at least in France and the UK. By contrast, skill supply outgrew skill demand in several countries, especially in Germany, but to some extent also in Sweden and the Netherlands. In the case of this group too, a better balance was achieved in the second part of the period.

Work Quality

Our earlier report also underlined the varied and often ambiguous nature of the indicators of task discretion used by many studies. In particular, it pointed to the importance of distinguishing more clearly between different forms of job control. In principle, as well as individual task discretion, control can be exercised through participation in work teams, through involvement in decision-making in local work units, through broader forms of organisational consultation or through trade union representation.

Intrinsic job interest, often proxied by measures of the perceived variety, monotony or repetitiveness of a job, has usually been seen as integrally linked to skill trends. Rising skill has been thought to enhance job variety, while declining skills are held to undercut it and to lead people to feel that their work is monotonous. In general research on skills in the last two decades has pointed to a tendency for skill levels to rise. This would lead to the anticipation that job interest should have risen correspondingly. However, as was shown in the state-of-the-art review, a remarkably consistent finding from national research in a range of countries over the last decade has been that there was an absence of any improvement in job interest in the 1990s.

The healthy and safety of work conditions is the aspect of job quality that has the longest national statistical data series and that has received the most sustained comparative research over the last decade – in particular through the European Surveys on the Work Environment. For the 1990s, the different survey indicators show a somewhat paradoxical pattern. In terms of a very general question on whether people feel that their health and safety is at risk because of their work, the evidence points to a small improvement in working conditions. However, if the battery of items measuring specific hazards is examined the picture is more one of lack of change or even deterioration in

working conditions. An initial item for the research agenda is then to account for this disparity. Presumably either people have difficulty in making a global assessment of their working conditions or the specific measures fail to capture some of the aspects of health and safety in work conditions that are most important to employees themselves.

A controversial feature of the data on health and safety is that it is seen to be primarily focussed on the types of hazards that are associated with work in manufacturing industry. It has been argued that such factors are decreasingly relevant in assessing the risk factors that characterise work in the service sector, which are more related to the psychological stress that arises from dealing with people in acute need or with people that are difficult to handle. According to some analysts this leads to a serious bias in reported health hazard statistics. Traditional measures in terms of fatalities and physical injuries have shown a decline over a long period, but this decline largely reflects changes in industrial composition – in particular the very reduction in the numbers employed in the shipping and coal mining industries. There are no few measures over time of the potentially rising form of health hazard – work related psychological stress (an exception is for Sweden, where the LNU surveys provide points of comparison in 1981, 1991 and (2000)).

A consistent theme in the sociology of work, is that there is a long-term process of increasing work intensity in advanced industrial societies. This was one of the principal themes of neo-Marxist critiques of Scientific Management and 'Fordism'. The reduction of the skill content of work tasks and an ever finer division of labour, it was argued, were designed to allow an intensification of work through weakening the capacity of resistance of the workforce, facilitating more precise measurement of task activities and permitting a tighter linking of financial incentives to output. This was reinforced by the introduction of assembly line technologies that made possible the machine pacing of work and mechanical control of work rhythms. However, especially from the mid-1980s, there was growing criticism of the view that there was some inexorable 'law of the capitalist division of labour' marked by ever increasing pressures for the deskilling and simplification of work. Instead the focus of attention shifted to the possibility that new production technologies and the increased emphasis on quality in both production and service delivery placed a higher premium on skill and team work thereby reversing the historic process of an ever greater division of labour. In their more extreme form such

arguments pointed to a radical process of organisational de-layering and the delegation of extensive decision-making powers to both individuals and the work group.

Yet while rejecting the deskilling thesis, proponents of the upskilling scenario continued to endorse the view that the changing nature of work implied increased work pressure. Indeed, this was directly linked to the process of upskilling. The need to learn new tasks increased pressure in the job. At the same time, the increased responsibilities of employees, as a result of upskilling and the delegation of decision making, were seen to be an important factor leading to higher levels of work pressure and work strain). In addition to this, a number of studies in the late 1990s pointed to the increased pace of technological change as an important factor underlying increased work intensity and work strain. In particular, this was related to the spread of computer-based technologies. While these may have contributed to the process of upskilling, at the same time they provided ways of increasing the efficiency of workflows, thereby removing much of the 'idle' time associated with traditional manufacturing technologies. At least in certain types of work, they allowed for more systematic monitoring of performance, with the potential for greater continuity and precision than traditional forms of performance control.

Research provided support for the general argument about a trend to intensification for the early 1990s both within specific countries and cross-nationally in the European Union. It also showed that processes of upskilling were far more strongly associated with rising work pressure than deskilling. In contrast, however, a trend towards increased work intensity was not confirmed by evidence for the period 1996 to 2001. This raises serious questions about the adequacy of existing explanatory schemas.

Training and Career Development

The resurgence of interest in recent years in the importance of education and training in furthering the goals of economic progress, fuller employment and social integration coincides with a new emphasis on the need for 'life long learning', both to respond to current changes in the organisation and technology of production and service delivery and to counter the socially disruptive effects of increased labour market flexibility. One of the most important measures to be taken is to promote Lifelong Learning and to

prevent workers from being de-skilled and others to find better and more secure jobs through continuing vocational education and training (CVET).

Continuing vocational education and training though, plays a major role for the adaptation of industrialized societies to internationalising markets. Low-skilled workers face greater risks of losing their jobs and/or face long-time unemployment, as their marginal productivity is below the market wage and their flexibility to execute different jobs is too limited. To prevent this group from social exclusion, there is a need to help this group of workers to (re-) skill themselves and therefore strengthen their productivity. Unfortunately, training incidence is a highly selective process in favour of the already high-skilled young workers who already have good employment perspectives, thereby increasing the disadvantages confronting the low skilled (OECD 2004).

There has also been a parallel interest in the effects of education and training targeted on the unemployed, and that this field has generated a substantial body of sophisticated empirical research that has already been extensively (Heckman, Lalonde and Smith, (1999). Most empirical work has been confined to relatively short-term employment and earnings effects. The results of this research are inconclusive, and largely negative, suggesting, at best, that the effects of active labour market programmes on the labour market prospects of unemployed workers are quite limited (Wingens, *et al* (2000) and: Checcaglini (2000)). However, positive effects have been found for carefully targeted programmes and those delivered to particularly disadvantaged participants (Fay, 1996) and in respect of programmes with close linkages to the open labour market (O'Connell, (2002a).

The definition of training CVET is not unproblematic. Job-related training of employees covers a wide range of activities, from class-based formal training events through participation in seminars, to very informal self-directed individual learning, perhaps with the aid of information technology. A distinction that is beginning to gain acceptance is that between formal education, which is class-room based and part of the mainstream education system, non-formal education or training, which refers to all organised learning activities outside regular education, and includes seminars as well as correspondence courses; and informal learning which is performed by the individual without reference to an instructor or training institution.

It is well established that participation in job-related training is highly stratified: those with lower skills or educational attainment are much less likely to participate in job-related training than those with higher skills or education. This “training gap” is found in all advanced industrial societies. However, there is substantial inter-country variation in overall training participation and the size of the training gap between high and low skilled. There are also important differences in the incidence of training in workplaces in different economic sectors and by size of establishment. It would be useful to examine the extent to which characteristics of countries (including labour market and education systems), economic sectors, and workplaces influence the incidence of training: how do these contextual factors mediate the effects of individual characteristics (particularly education and age) on participation in job related training?

A related set of questions concerns the extent to which such contextual factors represent barriers to participation by those with low educational attainment low skilled in job-related training, as well as the identification of workplace, sectoral and institutional factors that could stimulate job-related training among the low skilled. Most of the existing research on job-related training has focussed on the influence of individual characteristics (sex, age, level of education etc.). Most studies have found that younger workers are more likely to participate in CVET than older workers. Those with higher educational attainment are also more likely to engage in CVET. Most studies suggest that gender differences in access to training are slight, among employed workers, although some studies have found a male advantage in access (Evertsson, 2004).

A wide range of contextual variables has not, as yet, been examined. These include:

Legal frameworks governing training, employment protection and minimum wage laws. Strong employment protection legislation may stimulate training to the extent that both parties, but employers in particular, expect the contract to endure. This may, however, be at the expense of unemployed and temporary workers, who may consequently receive less training. Minimum wage laws, by compressing wage structures may boost expected returns to employer investment in training and, therefore lead to greater training. Labour market organisation. Internal labour markets may stimulate employers to invest in CVET while employees are more likely to take responsibility for investing in their own training in occupational labour markets since they are more likely to realise the returns.

Educational systems – stratified versus comprehensive system. Comprehensive initial education systems emphasise general rather than occupation-specific skills. The incidence of CVET can be expected to be greater in countries where comprehensive educational systems are dominant than in those where stratified educational systems prevail (Brunello, 2001).

Financing arrangements. Training levy-grant systems that raise payroll taxes to generate training funds been introduced in a number of countries on order to counter market failures associated with poaching of trained workers. However, while such levy schemes may encourage employers to provide training, the system removes the training decision from market logic, potentially leading to sub-optimal training choices.

Firm and organisational characteristics. We know that larger organisations are more likely to train their employees. Certain sectors, such as finance and business services, are also more likely to invest in trainings. However, much less is known about the impact of market position of firms.

There is a growing emphasis on the importance of high performance working practices, much less is known about the relationship of such work practices and training behaviour.

Job characteristics: We expect that workers engaged in atypical working arrangements, part-time work and temporary contracts, are less likely to participate in CVET.

Research on the impact of job-related CVET, is still developing. Most work today has focused on wage effects of training, reflecting the expectation that training may lead to enhanced productivity and, therefore, increased wages. Key additional effects of job-related training that have received less attention may include employment prospects or security and career mobility or progression.

There is some research to suggest that the effects of training may differ between population sub-groups. For example, a recent OECD (2004) study using ECHP data for 13 European countries shows that training appears to lead to wage growth among young or highly educated workers, but to enhanced job security among older and low-educated workers. This effect among younger workers is at least partly consistent with Brunello's

(2001) finding, with similar data, that the returns to training among those with third level education declines with labour market experience, perhaps because educational qualifications may become outdated over time.

Studies in individual countries provide additional evidence of important differences between sub-populations in the effects of CVET. One of the interesting findings from the literature on the impact of training is that the wage returns may be higher among those with low propensity to participate. Higher returns to training among groups with low rates of training participation (such as those with low educational attainment) could be due to selection effects, but could also be due to higher returns to training among those with poor qualifications who, despite low skills nevertheless work in the primary segment of the labour market, or, in the formulation of Booth and Zoega (2002), in 'good' firms, where the average stock of human capital is high. The extent of these potential interactions should be investigated (e.g. across organisations, sectors and countries), as should the mechanisms for such differential effects.

Some of the returns to training are captured by workers either with a time lag or when they change employers. Loewenstein and Spletzer (1999) using US data, and Booth and Bryan (2002), using UK data, find that the impact of employer-provided training on wages is higher in future than in current firms. These effects suggest that employers have some monopsony power over their own trained workers, that trained workers may not receive their marginal product, and that training, including general training paid for by employers may be transferable across jobs. These effects are not consistent with the implications of the human capital approach and the assumption of a competitive labour market. Of interest here is that the empirical research on the incidence and effects of training may be of interest not only in its own right, but may also have important implications for the dominant theoretical framework informing our understanding of the relationship between human capital formation and labour market behaviour.

Empirical evidence of the impact of training at the level of the enterprise is less developed than the evidence relating to individuals, although there is a growing literature which suggests that training increases the productivity of firms and leads to higher earnings for trained personnel. Quantitative analysis of enterprise-level data has tended to focus more on the effects of training on company performance (e.g. Barrett and

O'Connell, 1998; Bartel, 1989; Holzer *et al.* 1993), although several studies have found evidence of positive effects of training on wages (Bartel, 1995; Booth, 1991; Loewenstein and Spletzer, 1997; Goux and Martin, 1997). Moreover, a number of studies have found that training enhances both company performance and workers' wages (Bishop, 1994; Groot, 1994).

Family

Family and household changes are pivotal in any description of recent changes in European societies. They are of central concern to social scientists because the way the family is organized determines fundamental social relations. As the main locus of early socialization as well as of social support and intimacy, the family is the most fundamental social institution in modern society

Changing Family Structures

Sociologists and demographers have made significant progress in establishing the correlates of cohabitation and marital breakdown at the individual level, and in many cases the magnitude of these effects (Chan 2003a & b). Similarly there has been considerable success in identifying the socio-economic factors associated with women's fertility decisions within individual countries (Fahey *et al* 2003). However there remain factors for which the empirical evidence is inconsistent. For example, there is some disagreement about the impact of education, premarital cohabitation, and children on the risk of marital dissolution. One of the reasons for contrasting results is that the influence of some of these factors are changing and we need to understand why such changes are taking place.

Researchers have been less successful at explaining the societal level changes or the differences between countries in these processes. For example in relation to divorce rates Tzeng and Mare (1995) suggest that 'despite the consistency of these socioeconomic effects, they are relatively inconsequential for understanding recent increases in rates of marital disruption and the gap in marital disruption rates between blacks and whites'. Similarly, Kohler (2000, 23) points out 'fluctuation in birth rates in developed countries have been considerably less regular than many explanatory theories suggest.'

Rindfuss and Van den Heuvel (1990) as well as others have pointed to the effect of 'normative, cultural, ideational and ideological changes'. Specifically they suggest that secularisation and individualism are important social forces effecting the drastic changes in the family formation process. While this is certainly true, a systematic framework, which links social norms and cultural change to individual choices, is required. A promising line of research highlights the role of social interactions in individual choice and decisions, including those related to the family (Akerlof, 1997; Kohler, 2000). These scholars argue that in addition to what might be called private utility there is also a social utility, which also influences individual choice. The latter could arise either from a desire of individuals to conform or from the opposite desire of status seeking. In both cases, individuals' choice depends partly on the choice made by others in their community.

Research shows that divorce is associated with a number of negative 'outcomes' for adults for example divorcees are more likely to experience psychological distress, anxiety, depression, physical ill health, unemployment, higher mortality rate. Furthermore, divorced women are likely to be exposed to economic hardship (Holden & Smock 1991; Kitson & Morgan 1990; Raschke 1987). However these research questions involve critical issues about causality - both the direction of causality and the possibility of alternative causal mechanism such as social selection (some unobserved characteristic may mean a person is more prone to both divorce and unemployment for example). Answering these questions requires data that is longitudinal and conducted at regular intervals, starting at a point long before the divorce is a fact. Most data sets and studies lack at least some vital information. Thus, it is often not possible to study whether the consequences of divorce differ between societies, and whether the mechanisms vary.

Consequences of Family Change for Children

An obvious question is to what extents changing family patterns have consequences for children who experience them. Much interest has been devoted to the study of children of divorce. Both earlier studies (Hetherington, Camara, and Featherman 1983, Amato & Keith 1991b; Demo & Acock 1988; Seltzer 1994; Ni Bhrolchain 2001) tend to converge on the finding that children who have experienced their parents' separation have lower

wellbeing and school achievement, among other things. There are several plausible mechanisms behind, such as family stress, time squeeze, loss of resources in the custodial family, and residential relocation. These causal interpretations are, however, challenged by one that focuses on selection effects, arguing that common but unobserved background variables (such as parental conflict or aspirations) affect both family structure and child outcomes (Ni Bhrolchain 2001; Ginther and Pollak 2003). Longitudinal data, available for England and the U.S.A., where controls for pre-divorce conditions such as the conflict level in the family have been possible to make, find weak negative “effects” of divorce itself (Cherlin et al 1991; Ni Bhrolchain et al 2000). A recent Swedish study on sibling differences in educational attainment also suggests that selection is a major explanation for the negative association between family disruption and children’s educational attainment (Björklund and Sundström 2004); other studies using the same approach have nevertheless found negative effects (Duncan et al 1998; Ermisch and Francesconi 2001), though with few sibling pairs.

In addition to studies on divorce, several studies suggest that family reconstitution is as bad, or worse for children’s educational achievements than is single parenthood (e.g., Jonsson and Gähler 1997; Ni Bhrolchain et al 2000; Thomson, Hanson and McLanahan 1994; Ginther and Pollak 2003). On average, re-partnering means markedly improved economic circumstances, but stepfamilies may have greater levels of conflict, with the biological parent having the additional burden of managing the relationship between children and a stepparent, countering effects of economic advantages on children (e.g., Hanson, McLanahan and Thomson 1996). Again, the problem of finding a way to control for unobserved heterogeneity is crucial.

Family Work Interface

Reconciling work and family commitments has become a critical issue in European societies (OECD, 2001; Jacobs and Gerson, 2004). It is also a central goal of European employment policy. Under the traditional male breadwinner model competing demands in the employment and family sphere were managed by a division of labour between the sexes, whereby men were primarily responsible for ‘employment’ and women were primarily responsible for caring. The growth in female employment and dual earner families, the rise in lone parent families and the ageing population mean that an

increasing number of EU citizens now have to combine both caring and employment roles. Much of the focus of comparative research has been on national policies to facilitate work-life balance, but increasingly interest has turned to strategies at the firm level. Flexible working arrangements have been identified as one important means of balancing work and other commitments (Evans 2001; Glass and Estes, 1997; Dex and Smith, 2002).

The first basic research question in this area concerns the distribution and up-take of these arrangements. The evidence to date comes primarily from national studies of firms or employees, this has led to a lack of comparability across countries and makes it difficult to assess how firm level policies interact with State level. An important theme in this research concerns the 'business case' for introducing flexible working arrangements. Much of the existing evidence is based on case studies, however a number of quantitative studies have found these policies to have a positive impact on intermediary variables such as employee satisfaction, organisational commitment (Dex and Smith, 2001; O'Connell & Russell, forthcoming) while others have found a direct association with productivity variables (Dex & Smith 2002; Shepard et al. 1996). Further analysis of outcome variables such as work absences and job tenure would make a significant contribution to this debate.

A second research question concerns the effectiveness of these arrangements in easing work/family tensions and the implications of these arrangements for gender equality. While we know that part-time working is highly feminised in most countries other forms of flexibility may have a different gender distribution. In certain institutional contexts part-time working has been found to crystallize the gender division of labour within households and the asymmetry between men and women with regard to financial autonomy and security (e.g. Layte 1999) and access to leisure time. However it is not clear if these findings can be generalised to other settings and to other forms of flexible working.

A third question concerns the impact of flexible working arrangements on job quality. Once again the bulk of the literature in this area has focused on part-time work. This research has found that the quality of part-time work depends significantly on the national institutional context (Esping-Anderson 1999; Lewis, 1992; Saraceno, 1997;

Siaroff, 1994). In the UK and US part-time working is linked to lower pay, poorer promotional opportunities, less access to training and to occupational pensions, however in other countries the contrast between full-timers and part-timers is less stark (Gornick & Meyers, 2003). Further research is needed on the impact of other forms of flexibility and on additional aspects of job quality e.g. autonomy.

The relationship between family employment patterns and the well being of family members raises interesting research questions at opposite ends on the household/work spectrum. At one end are problems associated with conflicting work /family demands i.e. too much work. At the other end of the continuum there are problems associated with too little work within households i.e. work-poor households. The extent to which people's working lives are compatible with their family and other commitments is likely to be crucial for their own and their family well-being. Work-life conflicts are seen to potentially have a detrimental impact on personal effectiveness, marital relations, child-parent relationships and even child development (Gornick and Meyers, 2003). Very little is known about the impact of such work-life stresses on child well being and evidence directly from children is particularly scarce.

As the European Values Survey indicates there are strong divisions in Europe with regard to the perceived impact on child's welfare of the mother's participation in paid work. However there is virtually no debate on the impact of the father's participation in paid work. This is an important avenue for research especially in the light of research findings which show long hours of work for fathers in some countries. The increase in mother's employment is likely to reduce the risk of poverty and all its negative effects on child welfare. However, the beneficial effects of increased income might be traded off against any negative effects of reduced time and interaction between mothers and children. Moreover the extent to which children's economic welfare is dependent upon their mother's labour market participation depends upon the welfare regime this is particularly evident in relation to resources of children in lone parent families.

These issues of household resources are also particular pertinent to research on work poor households. The incidence of work-less households in the EU15 has declined in recent years (OECD, 1998), but the rates of household poverty among this group remain high and therefore require continuing policy intervention. In addition to causing family

poverty, unemployment is associated with psychological distress among partners and an increased risk of marital breakdown (e.g. Burchell, 1994, Lampard 1994). Comparative research in this field can contribute to our understanding of how households manage and what resources they can draw upon (welfare, community, kin) when work is insecure or lacking, and with what consequences for the mid and long term for children. Also the impact of policies such as 'welfare to work' and making work pay, which are being developed across several countries, may be analysed in terms of their impact on family organisation and the gender division of labour.

Implications of Employment for Fertility Behaviour

Research questions concerning the impact of employment changes on fertility behaviour can be grouped under two main headings. First what is the relationship between increased female employment and fertility and secondly what is the impact of employment insecurity on fertility behaviour. The conventional economic view is that declining fertility and rising female labour force participation are mutually reinforcing: declining fertility frees up women to participate more fully in paid work, while increasing demand for female labour gives women the incentive to have fewer children. There is abundant evidence from cross-sectional analysis within countries that women with greater employment opportunities have lower fertility rates (Fahey et al. 2003) however the picture becomes less clear-cut when comparisons are made across rather than within countries. In empirical cross-national research, it has proved extremely difficult to find robust links between fertility decline and *any* socio-economic variable, either across time in developed countries or across countries in the world today (Hirschman 1994, Alter 1992). In fact fertility declines have been greatest where female employment is low or). Attempts to date to account for this paradox suggest that falls in fertility to Mediterranean levels may not reflect an emancipatory expansion of women's options but rather a new set of constraints which closes off child-bearing options which women might otherwise wish to pursue (Esping-Andersen 1999, Bettio and Villa 1998, Calhoun 1994). Further cross-national research is needed to develop these hypotheses.

Studies on the impact of atypical working arrangements on patterns of family formation are still scarce and sometimes contradictory. For instance one hypothesis is that flexibilisation in the labour market discourages marriage (long term commitment) and

incentivises cohabitation instead. But this does not explain why cohabitation is so uncommon in Southern European countries. There is also evidence from some countries that employment insecurity leads to postponement of entry into parenthood. Further studies of these issues can add to the complex explanations needed to account for national differences in fertility patterns.

Social Cohesion

Immigration

Assimilation

The classical and still most important question with respect to immigrants' integration in Europe is whether there will be assimilation in the middle and long run. Whereas this seemed to be the case in the past, particularly in countries that have experienced immigration for a long time such as France, there are voices that claim that this might not be the case in the future. There are also signs everywhere in Europe of persisting hostility against immigrants and their offspring.

On the one hand, there are plausible arguments that the second generation will do better than the first, and ample evidence proves such an assimilation trend over generations (Tribalat 1995 and 1996, Dayan, Echardour, Glaude 1996). On the other hand, however, there are likewise plausible counter-arguments and available studies also clearly show that the descendants of the immigrants from some groups still do much worse than the indigenous youth both at school (Alba et al. 1994; Kristen 2002) and the labour market (Bender and Seifert 1996; Granato and Kalt, Silberman and Fournier 2005). In all European countries, the results indicate that differences in initial capital (education) between different immigration waves do not entirely explain the ethnic gap for some groups in the job securing power of education observed for first and second generations. Some attribute these penalties to unmeasured differences in the quality of the human capital that the migrants possessed. But second generations of same groups also demonstrate penalties. In fact the gap is big enough to distinctly suggest the presence of discrimination .

Besides these two core spheres of the society other aspects also point to severe barriers to integration: The rate of intermarriages between immigrants and the native-born, often seen as the strongest indicator of immigrant integration, widely vary (Tribalat 1996) and for some groups is still very low (Klein 1997; Schmidt and Weick 1998, Vetter 2001). Thus, there are multiple indicators that ethnic segmentation might persist for some groups, and that immigrant assimilation might not be solely a matter of time or generations.

Of course, part of these problems may be explained by initial differences between the groups: immigrants widely differ in terms of social and cultural origin, level of education, language and religion. Historical relationship between country of departure and country of arrival also delineate differences. But it has also been discussed that structural conditions in Europe, above all labour markets, have changed since the mid-1970s. Unemployment has been consistently high in several European countries, especially for individuals with low or no diplomas or for young people (Goux and Maurin 1998). Fixed term labour contracts also became more frequent and precariousness is much higher than in the past. The demand for unskilled jobs have not disappeared, it has even increased in some sectors, but in total, employment opportunities offered in non-skilled sectors became scarcer than in the past, especially in the industrial sector. Alba and Nee (2003) hypothesize that it may be impossible to reproduce the post-1945 mix of strong economic growth and high structural mobility that helped integrate that immigrant offspring into mainstream US society. This could also be the case in Europe where immigrants and their children are generally less educated than the rest of the population.

Another distinctive trait of the period is labour market entry of youths who benefited from strong expansion of the educational system, which allowed more students to enjoy better educational opportunities and easier admission to higher education. This also means that those who are less educated may now encounter more competition in the labour market in the knowledge based society. Even if some immigrant groups do obtain great educational success and economic attainment in European countries, they do not necessarily demonstrate cultural assimilation raising further questions of integration. The religious question becomes also more and more important, particularly the issue of

Islam. Transnational migration in a globalized world also raises new questions upon sense of belonging, ethnic and national identity

Consequences relating to social cohesion are strong both with respect to objective and subjective dimensions. Some groups, especially the second generation, demonstrate high level of perceived discrimination. Silberman and Fournier (2004) show that in France about half of Maghrebian and Sub-Sahara African second generation of all educational levels entering the French labour market in 2001 did perceive discrimination and had pessimistic view about career prospects. In a global world where ethnic frontiers can rapidly become more rigid especially when socio-economic difficulties coincide with religious issues, perceived discrimination could lead to conflict situations and become one of the main issues for European societies. Anti-discrimination policies have been implemented at various and unequal degrees in the European countries, and the debate upon affirmative action is hot

The existing research literature suggests that ethnic disadvantages emerge at the point at which high cost decisions are to be made. Therefore, crucial transitions in the life course seem to be the most promising point for analysis in order to increase our understanding of the mechanisms fostering the persistence of ethnic inequality. Above all, transition to higher education, transition from education to first employment, and first marriage are such important life junctions, at which immigrants might fail in making decisions comparable to the mainstream population and hence get penalised in the longer run. Therefore future research should try to focus on these crucial transitions with adequate research designs (prospective longitudinal data) and with adequate research methods.

Understanding Mechanisms

Despite a large body of descriptive evidence on persisting ethnic disadvantages there has still been little empirical research in Europe trying to uncover the basic mechanisms through which ethnic inequalities seem to be reproduced. Theoretically, a resource-oriented perspective offers a fruitful framework, social resources being defined here as certain capital produced and used within specific social, institutional and cultural contexts. Following the classical distinction of Bourdieu it seems promising to differentiate between economic capital, human capital, cultural capital and social capital

thus emphasizing that a mere economic approach resting only on economic and human capital may be insufficient to understand many migration and integration phenomena. While these well-known concepts are relevant for research on social inequality in general, in migration and integration research the issues of the generalisability and transferability of capital, as well as interrelated issue of investment efficiency is of central importance. As many individual resources are largely country-specific, a mere act of migration might lead to immediate disadvantages for migrants, whose home-country specific capital (above all social and cultural) becomes practically irrelevant in the new setting. Moreover, under certain conditions (e.g. while expecting return migration) immigrants might be reluctant to invest in the country-specific capital. Evidently, these explanations only hold true for the first-generation migrants. In contrast, second-generation migrants have neither experienced migration, nor do they stick to ideas of temporary stay and future return migration. However, there are multiple ways in which disadvantages may be transmitted from generation to generation – and this is exactly where future research should concentrate.

In particular, parental resources, not mediated by children's human capital, might have a direct impact on children's success, as parents invest in their children's education and try to ensure the best possible labour market position for their offspring. The mere fact that 1st generation immigrants often occupy lower labour market positions, lack country specific cultural (e.g. host-country language competence) or social (e.g. ties to native-born population) capital might thus lead to ethnic penalties also for their children. Further, different types of capital are to some degree mutually transferable and capital tends to accumulate. Hence, disadvantages of ethnic or other minorities may build up because these groups under-invest in important generalisable resources (of the children) due to the lack of necessary specific resources (of the parents). Indeed, while investments promise benefits in the long run, immediately they are quite costly. For immigrants such costs will be particularly high, as they might not possess enough information to weight and reduce risks associated with them.

A second interesting perspective seeks to investigate the role of the perceptions and anticipations of the actors. Mechanisms of downward assimilation in the US context, which includes a history of racism and slavery, are partly grounded on Ogbu discussion about discrimination against African Americans. On downward assimilation, Ogbu

(1998) underscores the importance of actor perceptions and shows how youths in a state of hereditary domination develop behaviour patterns of rejection that reinforce low scholastic attainment and ultimate inferiorization on the job market. Originally using African-Americans as subjects, such analyses were then applied to groups of immigrant youth sucked into an identical process upon contact with urban African-Americans. Low-income urban African-Americans then supposedly acted as a magnet for successive generations of low-income immigrants. This approach stresses the role of actor subjectivity in the mechanisms of interaction at play in the genesis of conflict situations, which are an ingredient in the construction of low scholastic attainment (Rumbaut 1996).

American research has focused particularly on the role of the ghetto and ethnic segregation, the lack of opportunities in the ghetto, the absence of role models and of social disorganization. This line of theory suggests the importance of contextual effects and some research is now developing multi-level models to investigate individual and social influences on educational and labour market experiences of the second generation. Recent work of Kogan and Kalter (2004) compares same ethnic groups in different countries with different geographical concentrations. Methodological problems are numerous in dealing with geographical concentrations in the different countries, which define differently their administrative units, but we also need to qualify more the socio-economic characteristics of these concentrations, which offer different opportunities. Within the sociological tradition, there has been a major interest in the ethnic enclave. Links with co-ethnics that occur in the transnational community have been suggested as one reason for the economic success of, for example, Chinese trading groups. However, it is unclear whether the advantages also accrue to the subordinate members of the ethnic community or are restricted to the entrepreneur.

Spatial Segregation

Social policy at both the EU level and in many member states has shown a high level of interest and innovation in 'area-based' and neighbourhood responses to urban disadvantage (e.g. the 'neighbourhood renewal' programme in the UK, *Contrats de ville* and *Zones urbaines sensibles* in France – see OECD 1999). However, the research basis for these policy responses remains uncertain: only a minority of the poor live in poor neighbourhoods, and it is unclear to what extent the apparent disadvantages associated

with living among poor neighbours are due to selection effects and the remote effects of national or transnational structures rather than the real proximate effects of the local social ecology. In consequence, much academic work has argued that area-based responses to social exclusion are either misguided or overstate their potential benefits (see Townsend 1979 for a particularly strong version of this argument). The most that can be said with any confidence is that such interventions may bring some benefit to some of the poor in some deprived neighbourhoods but should not be expected to be anything more than of secondary, or even lesser, importance (for a balanced assessment, see Glennerster *et al.* 1999).

From a European perspective, an important aspect of the tradition of quantitative social research in this area is its American origins. Research on urban spatial segregation developed in the United States in response to the large-scale migration of American blacks from the rural south to the northern industrial cities from the 1930s onwards and the consequent emergence of the black ghetto as a major feature of American metropolitan life (Cutler *et al.* 1999). Black ghettoisation amounted to a more extreme form of segregation than that based on any other form of ethnic, social or economic differentiation in American cities (Massey and Denton 1993). As such, it became a major target of quantitative social scientific investigation from the 1950s onwards (Duncan and Duncan 1955 was a seminal study, followed by Duncan and Duncan 1957; from the very extensive recent literature see, e.g. White 1987, Massey and Denton 1993, Quillian 1999, Jargowsky 1996, Cutler *et al.* 1999).

European interest in urban spatial segregation and neighbourhood effects on poverty has been strongly influenced by this American background. The race riots in cities such as Los Angeles and Chicago in the late 1960s which spurred much of the political concern for urban ghettoisation in the US found echoes in a number of European cities – for example, in the Toxteth riots in Brixton and the disturbances in Les Minguettes in Lyon in the early 1970s. Wilson's influential study of poverty patterns in Chicago, *The Truly Disadvantaged*, attracted a great deal of attention in Europe and spurred considerable European research. Reference to ghettoisation began to crop up in debate about European cities, often with alarmist overtones (for critical comment on such debate, see Ostendorf *et al.* 2001). In contrast to the US, where problem neighbourhoods were most often found in declining inner city areas, the usual focus of concern in Europe was the

large peripheral social housing estate which had been built in the mass housing drive of the 1960s and had quickly entered an ‘accelerating spiral of social decline’ (Emms 1990: 6-7). By the 1980s, as Vestergaard (1998: 115) says of the situation in Denmark, these problem estates had entered a process of ‘slummification’ and became the symbol of a ‘stagnating, troubled, debt-ridden society’. In Anne Power’s influential comparative work, they were presented as ‘estates on the edge’, which represented the European equivalent of the American inner-city ghetto (Power 1997).

However, concern about urban spatial segregation and worries that severely disadvantaged neighbourhoods could be found in all European cities lacked the foundation in empirical research that had been built up over half a century in the United States. One reason was that Europe had no equivalent to the long history of black-white racial division found in US cities and so lacked a policy focus for such research. Waves of rural to urban migration had repeatedly created problematic ethnic enclaves in major European cities. But these divisions lacked the durability and ubiquity, which characterised the black-white divide in America. Ethnic minorities from outside the European core grew rapidly in many European urban areas from the 1950s onwards and quite often these were less successfully assimilated into the host society than the ethnic migrants, which entered the US over the same period. However, the failures of assimilation which occurred in Europe in this period, while often more severe than those arising from new ethnic migration in the US, were far less severe than those associated with the black-white divide in the US, which was a legacy of eighteenth and nineteenth century slavery rather than of twentieth century ethnic immigration (Peach 1996).

Given the weakness of the data basis, it is scarcely surprising that comparative European research on urban spatial segregation is underdeveloped. Nevertheless, some analysis has been carried out in some. The findings consistently suggest that European cities have nothing, which compares with the segregation of the black population in US cities – or to put it more simply, Europe has no ghettos (Musterd and Ostendorf 1998, Peach 1996). In the BETWIXT project, London emerged as one of the most segregated of the seven cities, and data were available on racial composition by city ward from the 1991 census. These data yielded an Index of Discrimination (IoD) score for ethnic minority status for London of 0.35, which compares with a mean IoD score of 0.69 for black segregation in the 60 US cities examined by Massey and Denton (1989) and scores above that for major

cities such as New York, Chicago, Miami and Los Angeles (thus, for example, the Chicago IoD score in Massey and Denton's data was 0.88).

Other studies corroborate these findings. Peach's (1996) study of 1991 census data on ethnic minority concentration in British cities found that intense ethnic minority concentration at ward level was rare. Only three wards in the country had an ethnic minority population, which exceeded 80 per cent of the total ward population. The Black Caribbean population showed segregation levels only half those experienced by blacks in US cities (Peach 1996: 232). Indians and Bangladeshis did show higher levels of concentration than other ethnic minorities in Britain but again, by American standards, their level of segregation was mild. For Bangladeshis, for example, only one-third were living in wards in which they formed over 30 per cent of the population, and in these wards they amounted on aggregate to just over half the population (Peach 1996: 221). Analysis of continental European cities similar to that carried out by Peach in Britain are hard to find, though Musterd and Ostendorf (1998) found relatively low levels of segregation in Amsterdam, while comparisons with four other European cities produced similar results (Musterd *et al.* 1997).

The evidence so far available thus strongly suggests that parallels between American and European cities as far as racial or ethnic segregation is concerned are few and slight (cf. Massey and Denton's suggestion that the more appropriate parallel in the case of US cities is with South Africa – Massey and Denton 1989, 1993). However, it is much less clear how levels of socio-economic segregation in European cities compare with those of the US. Research in the US indicates that concentration of poverty in US cities is much less extreme than concentration by race. Thus, for example, an 80 per cent threshold is commonly used to identify 'black' census tracts in the US (that is, where more than 80 per cent of the population in the census tract is black) but a 40 per cent threshold is used to identify 'poor' census tracts (that is, where more than 40 per cent of the population is poor). However, the question of race has loomed so large in research on urban spatial patterns in the US that other dimensions of segregation have tended to be regarded as secondary, or as somehow derivative from racial segregation. In consequence, analysis of poverty concentration treated as a primary concern, rather than as an adjunct to racial segregation, are rare in the US (for an important exception, see Jargowsky 1996).

In Europe, in those countries where spatial segregation has been researched to any degree, the reverse is likely to be true: the concentration of deprivation is likely to be the primary issue and racial or ethnic segregation enters in as a secondary concern. However, in these cases, the available data rarely allow for a close, precise and comparable quantification of small area levels of deprivation. In Britain, for example, where research on the spatial concentration of deprivation in urban areas has been extensive, key relevant variables (such as household income) are unavailable on a small area basis. The indicators used to measure neighbourhood deprivation have tended to consist of labour market and social service variables, and these are operationalised in such a way as to make them quite specific to the British context (e.g. the long-term unemployment claimant count, the percentage in receipt of income support, housing benefit claimants, etc.). In other countries, sample survey sources have been used to examine the spatial patterns of poverty (e.g. Nolan and Whelan 1998 for Ireland), but these produce more aggregated results, which can be informative but are difficult to use in comparative analysis.

In sum, European research is not yet in a position to produce comparable indices on the spatial concentration of deprivation or poverty in European cities. Given that this basic quantification is lacking, the foundation for causal analysis or for well-grounded policy prescription in this area is weak. Since the primary source of this weakness lies in the fragmented and diverse nature of national data sources on the relevant issues, it is hard to see how progress can be made on this front in the foreseeable future.

The second tradition of research on urban spatial segregation, which was referred to earlier, is grounded in the neighbourhood study. This tradition centres on what is essentially a case study approach, though sometimes the case being studied is a particular city, or a cluster of neighbourhoods within a city, rather than a single neighbourhood. It generally places a strong emphasis on qualitative methods, but also often includes some quantitative elements. At its best, this kind of work can attain high standards and exert a great deal of influence. As in all case study approaches, the principal difficulty with this approach lies in the generalisability of its findings, which in turn arises from the problem of drawing comparisons between particular studies. In instances where case studies have sufficiently similar designs to be open to comparison with each other, superficial similarities may turn out on close inspection not to be well

founded, and apparently well-grounded conclusions in a one case may turn out to have questionable validity in another. The more common situation, however, is that case studies are too idiosyncratic to be evaluated alongside each other. The more compelling the case study and the more powerful its impact on either the scholarly community or the public at large, the less valid it may be as a guide to general circumstances.

Wilson's *The Truly Disadvantaged* could be highlighted as a case in point. Chicago, the subject of this study, is an exceptionally segregated city even by American standards, and it is thereby likely to be particularly far removed from the conditions typically found in European cities. Yet, its main findings, especially in relation to the urban 'underclass' have tended to be readily accepted as a guide to universal patterns in western cities. In consequence, European researchers who have seriously addressed these findings have had to expend much energy pointing out how its conclusions do *not* seem to apply to Europe, even in those situations where they might seem likely on *a priori* grounds to have greatest validity (see, e.g. Nolan and Whelan 2000; see also Kleinman 1998).

Urban spatial segregation and its implications for social inequality and disadvantage are topical issues in European social research and social policy debate. Yet the foundations for work in this area are weak. The quantitative bases for measuring urban spatial segregation are more fragmented and diverse than in the United States, the home of this kind of research. In consequence, it is difficult to establish how much spatial segregation there is in European cities, much less examine what its causes or consequences might be

Social Capital

There has been an explosion of interest among policy makers and social scientists around the world in social capital in the last decade or so. Both the World Bank and the OECD have adopted programmes on social capital (Grootaert and van Bastelaer 2002a, OECD 2001), as have many national governments. The World Bank initiative in this area is particularly influential, both because of the breadth of the claims it makes on behalf of social capital (Grootaert and van Bastelaer 2002a) and because of its efforts to develop a methodology for social capital measurement, as represented by its Social Capital Assessment Tool (Grootaert et al. 2004; Grootaert and van Bastelaer 2002a). The World Bank programme in turn has been inspired in considerable measure by Robert Putnam, a

major populariser of the concept, who has claimed that ‘social capital can influence everything from infant mortality rates to solid waste management to communal violence’ (Putnam 2002: xxii).

Research on social capital in affluent societies has focused less on its general contribution to development than on a heterogeneous range of narrower issues. One major concern has been *to quantify levels and trends* in social capital over time and between countries, much of it inspired by Putnam’s seminal study on the decline of social capital in the US (Putnam 2000). Here the key questions are whether Putnam’s findings on the downward trend in social capital in America are factually valid (Costa and Kahn 2003) and whether they are generalisable to other developed countries (for a review of evidence on this question for the UK, Netherlands, Sweden, Australia, Japan, France and Germany, see OECD 2001: 99-103; see also Dekker and van den Broek 2004).

A second concern has been to examine the *effects* of social capital in various areas of daily life, such as the educational performance of children, mental and physical health, unemployment and job-search behaviour, and coping responses to poverty in deprived neighbourhoods (for reviews, see Portes 1998, OECD 2001, Durlauf and Fafchamps 2004). A third related concern has been to examine the *sources* of social capital and particularly to identify the causes of low social capital. Putnam’s original hypotheses on this issue were uncertain, and were more in the nature of speculations about the detrimental effects of television and the passing of the ‘civic generation’ (those who directly experienced the Depression and the Second World War) than firm propositions. Recent explanations have directed attention at poverty, inequality and community heterogeneity as causes of low social capital (e.g. Costa and Kahn 2003, Uslaner 2002, Alesina and La Ferrara 2000). The latter explanations are important both because of their apparent robustness and because they raise questions about the direction of causality, especially as they imply social capital might be as much a consequence as a cause of the social conditions it is often found to be associated with.

From the perspective of the research on social inequality and poverty, an area of research to note is the overlap that has occurred between social capital research and studies of disadvantaged neighbourhoods. The key recent influence in this context is William J Wilson’s book, *The Truly Disadvantaged* (1987), a study of the interaction between

neighbourhood, race and disadvantage in the city of Chicago (Wilson 1987). Wilson's work did not make use of the concept of social capital but his analysis of the combined effects of inner city cultural norms, neighbourhood social networks, family structure, joblessness and poverty in Chicago's black ghettos echoed many of the themes which were subsequently taken up by those researching urban poverty from a social capital perspective. His inspiration give rise to what Massey (1998) referred to as 'the mad search for neighbourhood effects' in studies of urban disadvantage. Some have argued that the effects of local communities on the circumstances of deprived households are easy to overstate and that research on this topic is still inconclusive (Small and Newman 2001, Whelan et al. 2002).

A final concern of existing research, which is relevant to the EU, is the interaction between social capital, civil society and development at the national level. The weakness of civil society – the 'third sector' non-governmental organisations is which occupy a space between state and market – is an important theme of social capital research in developing countries. A strong civil society is considered to be a spur to good government and a healthy relationship between the business sector and society. Much of the interest in social capital in this context is concerned with the linkages it can make between individuals or households on the one hand and civil society structures on the other. Similar concerns are also relevant in the EU, particularly following the recent eastern enlargement. Reflecting their communist heritage, many countries in central and Eastern Europe are thought to have weak civil society structures and so lack the institutional context in which social capital might flourish (Paldam and Svendsen 2001, Svendsen 2003). Civil society is also a concern in many of the older EU Member states. This is particularly so as social policy in many EU countries has also come to rely on civil society actors as partners in policy development or as vehicles for the delivery of services or implementation of initiatives (Kendall 2001). There is also the somewhat different concern that a strong welfare state might displace informal associational life and so 'crowd out' social capital (Oorschot and Luijkx, 2005).

While social capital research has been swept forward on a tide of popular and academic interest, it has also been subject to extensive criticism. Fine (2003), for example, sharply criticises many aspects of the World Bank's programme of research on social capital and argues that the concept of social capital has now become so debased by poor

application that it is beyond rescue. Durlauf (2002: 474) concludes that the empirical social capital literature is ‘particularly plagued by vague definition of concepts, poorly measured data, absence of appropriate exchangeability conditions, and lack of information necessary to make identification claims possible’. Durlauf and Fafchamps (2004: 62) contend that ‘the extravagant claims so often found in this literature ... have little prospect of having lasting social science value’, and include Putnam’s *Bowling Alone* in that negative judgement.

The most common theme in this body of criticism is that research on social capital, which is applied in a rigorous way, and with carefully delimited research objectives can have value, but that much of the work so far carried out in this field fails to meet these standards. A subsidiary theme is that many of the claims about the importance of social capital may be overstated and that careful testing would show its influence to be more modest and contingent than its proponents claim.

A severe problem is the unclear relationship between two of the main integral parts of social capital, voluntary associations and social trust. In a Tocqueville tradition, Putnam sees a causal link flowing from membership in associations to generalised trust: “People who join are people who trust” (Putnam 1995: 666). We learn to participate by participating, and by participating in regular and close contact with others on a voluntary basis we learn ‘the habits of the heart’ (Bellah et al. 1985) of trust, reciprocity, co-operation, empathy for others, and an understanding of the common interest and common good. This idea has been criticised on both theoretical (see, for example Newton 2001) and empirical grounds. Empirically there is a certain amount of evidence to support the theory (Brehm and Rahn 1997; Stolle and Rochon 2001; Paxton 2002) but often it is weak and patchy, and often it fails tests of statistical significance (van Deth 1996; Booth and Richard 2001: 50). Hooghe (2002: 5) is also clear on the point: ‘There is no indication whatsoever that interaction with other group members would automatically lead to the development of a more socially oriented value pattern, to a rise in trust levels, or to abandoning prejudices.’ Moreover, it is unclear to what extent emerging trust is restricted to the group-members only, or to people in general. This transfer effect seems very much to depend on the associations’ aims and the diversity of their members (Stolle/Rochon 2001). In spite of its long and distinguished intellectual

lineage, therefore, the theory that membership of voluntary associations generates social trust finds rather little supporting evidence in modern survey research

Further criticism points to the so-called *dark sides of social capital*, and its impact on democratic development. Levi (1996) points out that gangs and the Mafia accumulate social capital but that this is *unsocial* capital seen from perspective of society at large. A further example is Weimar-Germany, where an extremely dense network of voluntary associations had existed, which, however, to a large extent was mobilised *against* democracy. Hence, to conclude that the voluntary gathering of people in associations automatically stabilizes democratic order and improves the production of collective goods is to see things too simple. Sobel (2002: 146) states that the ability to use network relationships need not to be good for the society at large. In many circumstances, these benefits come at a cost to individuals or groups outside the network. To overcome this problem, the distinction between bridging (inclusive) and bonding (exclusive) associations has been introduced (Putnam 2000); while bridging associations bring together people from various backgrounds and are oriented towards the *Gemeinwohl*, bonding associations are less diverse in their membership and serves a particularistic aim only. However, in reality it is difficult to distinguish between bridging and bonding networks

Trust, Association and Legitimacy

Trust has been recognized as a very important element in a society a while before the concept of social capital emerged (Arrow, 1969). At the societal level, the extent to which trust has evolved within and between groups has implications for the ability of the political community to develop modes of coexistence and generally accepted rules of social, economic and political exchange.

The shift towards a knowledge economy, aging and changing labour market and family behaviour necessitate welfare state reform. The politics of such reform may rest on the capacity of governments to engage the support of trade unions and engage in social dialogue, and in the ability of governments to dissociate the self-serving protest of disadvantaged interest groups from the support of the moral majority (Schmidt, 2000: 231). Such a process of 'normative legitimization' may involve the appeal to the values

of solidarity on which the welfare state is supposed to be based on (in the case of pension reform, and in other to relief the burden of a smaller younger generation this means invoking the norm of intergenerational solidarity). It may also involve an appeal to competing values, for instance self-help instead of state provision where less generosity and a new distribution of risks is the objective. Or, in extreme situations, when sacrifices are asked to 'save the nation from disaster' there may be an appeal to the 'national identity'. Schmidt (2002) claims that no major and initially unpopular welfare-state reform could succeed in the medium term if it did not also succeed in changing the underlying definition of moral appropriateness. It would seem very important to explore this relationship between welfare reform and values on a comparative basis across Europe.

Trends in union density are diverging across Europe, with some countries experiencing substantial decline, while others experience stability or growth. Membership fell by 8% between 1985 and 1997 in the European Union and aggregate density by 20%. (Visser (2003)). Differences in levels of union density matter because unions affect wage levels (Blanchflower and Bryson, 2003), wage inequality (Card, Lemieux, and Riddell, 2003), labour productivity (Metcalf, 2003), firm performance (Hirsch, 2003), bargaining behaviour, coordination and social dialogue (Calmfors et al., 2001).

Although there is a substantial literature on factors associated with union membership status, most of it relates to Anglo-Saxon countries plus a few other countries (Riley, 1997). This is largely due to the absence of rich micro-data across countries. Current knowledge on union density across Europe relies on aggregate data mostly from administrative sources that are not comparable in terms of the sample populations they cover, data collection methods, and membership definitions (Ebbinghaus and Visser, 2000). The European Social Survey (ESS) permits accurate estimates for each country (and subgroups of industries or occupations), for the first time including all 25 members of the European Union. The survey also allows us to measure levels and forms of participation and militancy beyond formal membership in the union. Participation in unions as 'democratic organisations' is of interest in its own right and Comparison of participation levels across Europe may tell us something about support and legitimacy of unions, and their potential contribution to social cohesion.

Participation in voluntary organisations such as unions may engender trust, loyalty, altruism and cooperation, in part due to information flows reducing the ‘social distance’ between individuals (Glaeser *et al.*, 2002). Others maintain participation in such organisations is a function of norms of reciprocity and trustworthiness that facilitate co-operation, or that social trust and social participation are simultaneously determined (Putnam, 2000; Johnston and Jowell, 2001; Visser 2002). Unionisation matters also for legitimacy and cohesion, because many employees want union representation but are unable to get it, leading to a ‘representation gap’ (Bryson and Gomez, 2003a; Towers, 1997). This representation gap tends to be larger for those with low educational levels, unemployed, immigrants or ethnic workers, employees in small firms, those in unstable or flexible labour relations, etc. However, such representation gaps may be mitigated through coordinated bargaining and legal extension clauses.

Comparative research inspired by Robert Putnam’s *Bowling Alone* suggests that social class and educational attainment are strong predictors of associability. Blue-collar and low-educated workers participate in fewer and in a smaller range of associations and they are less active in them (Hall, 2002). Offe and Fuchs (2002) report a similar finding for Germany. They stress the paradox that the less educated depend more on the few associations they join and are hit hardest by the decline in traditional associations like trade unions. The local trade union or workingmen club was probably the association by which manual workers were most ‘captured’ and mobilized into voluntary activities and active citizenship (Flanders 1952). Offe and Fuchs (2002: 241) develop the hypothesis that for manual and low-skilled working people trade unions may have served as ‘functional equivalent’ for the verbal and cognitive skills which middle class people acquired through (formal) education. For lower-skilled workers, the ‘associational deprivation effect’ will therefore be smallest in associational activities that do not require verbal skills, such as striking, most physical sports, music, or religious worship. Another hypothesis is that not only formal membership in trade unions, but also informal sociability is more vulnerable to economic restructuring in the case of less educated workers. Patterns of informal sociability of these workers tend to revolve around close contacts with kin, neighbourhood friends and colleagues; consequently, the loss of work, neighbourhood change and economic restructuring tend to be far more disruptive.

Section 4: Conclusions and Policy Implications

Introduction

A fundamental objective of the CHANGEQUAL Network was to deliver an Agenda for Future Research. It was also intended that this Agenda would direct attention to areas of research where progress was a precondition of evidence-based policy. It is on these issues that we focus in this section.

Comparative Analysis of Intergenerational Inheritance

The Comparative Study of Social Mobility

Research on inequality of opportunity has been overwhelmingly oriented towards empirical description with the consequence that convincing explanations of, for example, cross-national variation in the origin-education or origin-destination associations are lacking. A first step towards explanation would be to use our existing knowledge to produce an exhaustive list of the set of family resources and institutional factors that impinge on the opportunities of children, and seek to measure their relative importance in particular societies. A further step would be to develop models of the mechanisms through which these associations are generated. Today, many would agree that any theory accounting for social fluidity patterns should be built up from a model of rational actors operating within an institutional framework. There are several theoretical papers that approximate this ideal, to a greater or lesser extent (Breen 1997; Goux and Maurin 1997; Pisati 1997; Goldthorpe 2000). Such models offer the possibility of deriving testable micro-models of individual behavior, whose parameters might differ according to institutional or other characteristics of different societies, characteristics that ideally also should include the hiring process, given the centrality of employers' actions to allocation decisions.

The development of explanations might be helped by better research design and analytical strategies. For example, few studies of social mobility compare the experiences of different birth cohorts; yet, there are grounds for supposing that, in the normal course of events, change in fluidity is driven less by period factors than by cohort

replacement (which is reflected in the importance of educational attainment in the social reproduction process): in other words, the successive replacement of older cohorts, who retire from the labour force (and who generally display less fluidity) and their replacement by younger, and often more fluid, cohorts who enter the labour market. If this is the case, the fluidity that we observe in period data will be a complex combination of historical processes and thus may prove resistant to explanation. A series of repeated cross-sectional data points will increase the opportunities for disentangling period and cohort effects.

International comparative projects in this area have, in recent years, been conducted as collaborations that have been based on increasingly comparable data, which has allowed them to move from visual examination of the results of similar analyses across countries (Shavit and Blossfeld 1993), to meta-analyses (Shavit and Müller 1998), and to direct modeling of individual-level data from different countries (Breen 2004). However, all these projects have used secondary data. The ideal and natural next step would be for a group of researchers from different countries to design a comparative project in which data collection and measurement were standardized across nations.

It is widely accepted that variations in observed mobility flows owe much more to differences (between countries or time points) in the marginal distributions of origins and destinations than to differences in social fluidity (Grusky and Hauser 1984: 29; Erikson and Goldthorpe 1992: 213-4; Breen and Luijkx 2004: 384). This might make the emphasis that has been placed on studying fluidity seem excessive, though if our interest is in inequality of opportunity, fluidity is, in fact, the proper thing to focus on. This is because fluidity is an inherently comparative measure, assessing the advantages of different groups relative to one another. Nevertheless, it would be useful if researchers, when discussing variations in fluidity, calibrated the impact of such variation on observed mobility flows, given particular origin and destination distributions. It would not be surprising to find that apparently large differences in fluidity entailed rather little difference in observed mobility. Furthermore, the use of log-linear models, under which patterns of association are unaffected by scalar transformations of the margins, may have led mobility researchers to underestimate the degree to which structural change can affect inequality of opportunity in the real world.

A further area of possible study is the residual link between origins and destinations once education is taken into account. The strength of this effect seems to differ between countries, but there have been relatively few attempts to specify it. In their discussion of intergenerational income mobility, Bowles and Gintis (2002:5) point to the plethora of possible factors that might cause an association between origins and destinations: ‘any individual trait that affects income and for which parent-offspring similarity is strong will contribute to the intergenerational transmission of economic success’. These traits include those things to which theories of social fluidity usually refer such as education, cognitive skills and personality characteristics which may be transmitted genetically or culturally and which are rewarded in the labour market, as well as other things which lie outside existing theoretical models, such as ‘race, geographical location, height, beauty, or other aspects of physical appearance, health status and personality’ (Bowles and Gintis 2002:5). One obvious way to explore such issues is to focus on the demand, rather than the supply-side:.

Finally, there should be scope to link the study of social mobility as pursued by sociologists, with the study of intergenerational income mobility, which is mainly carried out by economists. Class position and income are two determinants of life chances which are correlated but far from identical, and it would be of great interest to know whether the processes that help to shape the one also apply in the case of the other.

Meritocracy

Understanding the associations between class origins, educational attainment and class destination is central to the meritocracy theme. Bringing together the results of the empirical research, we can identify three main processes as being of interest: (i) persisting class differentials in the take-up of opportunities for higher education among children at the same level of demonstrated ability, (ii) the *weakening* association between educational attainment and class destination, and (iii) the capacity of children from more advantaged class backgrounds to maintain their class positions, even where their educational attainments are only modest. Instead, they exploit ‘ascribed’ attributes related to their family background (see Goldthorpe, 2004).

Transitions from Education to Work

Recent research has focused most comprehensively on differences in early labour market outcomes that are typically associated with different level and kinds of educational qualifications. Given this emphasis in recent research, the following can be singled out as promising areas for future research:

First: Coverage of institutional factors beyond educational systems: Only rather limited knowledge is available on the respective consequences that result from the various kinds of labour market regulation and forms of worker protection. Even less is known on how the recent measures of labour market deregulation affect or will affect young people's transition from education to work and their settlement in stable work positions (for recent work, however, see Mayer/Hillmert 2003; Hillmert 2004; McGinnity/Mertens 2004). What is the impact of lower standards of protection such as fixed term contracts or other non-standard employment contracts that are often especially implemented for new market entrants? To fully understand the large differences in labour market conditions and experiences that exist among European countries, in particular in the transition stage, more comprehensive analysis of the wide spectrum of institutional contexts is needed.

Second: field of study Insights into the role of education in processes of social stratification and mobility in general, and in the transition from school to work in particular, have considerably improved by moving beyond the study of vertical educational differentiation in higher versus lower levels of schooling and by emphasizing distinctions between vocational and general types of schooling within the same level (e.g. Brauns et al. 2003; Shavit & Müller 1998). A further extension of our insights in the importance of education for the stratification and mobility of modern post-industrial societies concerns the role of fields of study, or subject choice. Looking at fields of study can be seen as a further disaggregation of educational achievements, following up on the general-vocational distinction.

Third: The significance of labour market entry for career processes and intergenerational mobility: The transition from education to work covers a rather short slice in the life course of individuals. Yet, earlier work has shown, that these entry

positions are highly significant for the further course of work careers and they are strong predictors of the class position individuals can expect during much of their later working life, even though the strength of this association varies between countries (Blau/Duncan 1967; Blossfeld 1989; Erikson/Goldthorpe 1992, chapter 8). Much of existing research on this issue is based on rather dated data and not much is known on more recent developments. The transition from education to work has become more varied, less standardized, and more often involving (repeated) education work loops. What precisely then is the first significant job, that constitutes (in the perception of people) the real beginning of working life and locates individuals in a class position of their own and independent of their parents?

Fourth, study the employer side of personnel recruitment: Most research on school to work transitions relies heavily on data collected from individual workers who provide information e.g. on to their qualifications and other resources, on their labour market experiences, jobs histories, and other relevant issues seen in the perspective of the individual worker. Little is known about—and little attention is paid to—employer strategies on the labour market, particularly the way they evaluate qualifications of young people and their position in the competition with insiders

Fifth: Improve knowledge on Southern and Eastern European countries: Most research available in the area relates to countries in the North and West of Europe, much less exists for most countries in the South of Europe and only very few studies include the new member states in Eastern Europe. For reasons of both the different historical background of the latter societies and their rapid transformation in recent and in coming years research on the specific conditions in these countries is urgently needed (for recent studies e.g. see Kogan/Müller 2003, Kogan/Unt 2005).

Gender, Education and Labour Market Outcomes

Two main gaps have been identified in the analysis of gender, education and labour market processes. Firstly, field of study has generally been neglected in studies of intergenerational inheritance. This neglect appears, at least in part, to relate to the absence of large-scale datasets which include (comparable) measures of type of education. However, the analysis of the influence of field of study in shaping (gendered)

transitions from school to work would appear to be a potentially valuable topic for future research. Questions to be addressed include:

- How does social class background influence the type (field) of education received?
How do social class and gender interact in relation to field of study?
- How does the institutional context influence the level and nature of educational segregation by gender and class? Are such differences evident even within ‘general’ education systems, for example, in the type of academic subjects selected?
- What factors influence changes in the gendering of particular fields of study (e.g. medicine) over time?
- How does field of study influence early (and subsequent) labour market outcomes?
Does the relationship differ by gender and/or social class? Is the choice of ‘gender-atypical’ courses rewarded or penalised in labour market terms?

A second issue relates to the absence of information on employer strategy and the attributes sought by employers in recruitment (and promotion). At present, researchers tend to make inferences about employer preferences and practices on the basis of the actual pattern of employment and unemployment rather than from direct evidence. Questions to be addressed include:

- On what bases do employers select workers for particular occupations?
- Can jobs be regarded as ‘empty places’ or are assumptions about the kinds of workers that will occupy these jobs built into the way in which jobs are organised?
- Have there been changes over time in the types of signals used by employers in making recruitment (and promotion) decisions? Has there been an increased demand for ‘soft’ skills? What are the implications of any such changes for the gender composition of particular occupations?
- What factors influence changes in the gendering of particular occupations over time?

Income Inequality Poverty and Deprivation

Income Poverty and Low Pay Dynamics

A number of points relating to data and methods apply both to the study of low pay and poverty dynamics may be made. The first involves highlight various areas where data from the European Community Household Panel are enormously valuable in allowing dynamics to be investigated in a harmonised way across countries. The ECHP has of course now been discontinued, the last wave having been carried out in 2001, and is being replaced by a rather different approach to producing data across all the Member States, the *EU Statistics on Income and Living Conditions* (EU-SILC). This is to become the EU reference source for income and social exclusion statistics, and allows Member States to use both surveys and administrative registers provided that this data can be linked at the individual/ household level. Member States will also be allowed to separate the cross-sectional element from the longitudinal, panel element if they so wish, and the longitudinal “window” may be quite short – no more than four years. This highlights the importance of fully exploiting the panel data from the ECHP since it offers a substantially longer panel, though still of course well short of that available in the USA.

Much can be learned about dynamics from administrative data. While household income may not be captured by administrative data, earnings quite often are as social security contributions are collected, and social security receipt is also tracked administratively, so there is considerable potential for exploiting such data as a complement to survey-based research.

Finally, the measurement problems associated with longitudinal data need to be highlighted and researched. Issues relating to representativeness and coverage, attrition, non-response in surveys, incompleteness of records over time, sample size and length of panels, accuracy of information all loom large in researching low income dynamics. In the ECHP, for example, attrition appears to be related to income poverty status in some countries, and the scale of attrition has been particularly high in some. As well as improving data sources, methods of analysis need to be improved to take account of such problems with the basic data. Econometric techniques for correction for attrition bias and

measurement error have progressed substantially, but this is also clearly a key area for methodological development.

Multi-Dimensional Measures of Social Exclusion and Disadvantage

The Laeken common indicators of social inclusion, which now play a central role in monitoring the performance of EU member states in promoting social inclusion, relate not only to poverty and inequality measured in terms of income, but also to areas such as educational disadvantage, health inequalities, and unemployment. So a multi-dimensional approach to monitoring progress in relation to poverty and social exclusion has now been formally incorporated into EU processes, as it has been to a greater or lesser extent in many of the member states. Three topics suggest themselves as immediate research priorities in this context. The first is that there are areas not covered or inadequately captured by the current set of common indicators, such as housing and homelessness, where research can make a substantial contribution to the development of indicators that have sound conceptual underpinnings. A second issue which merits attention is how best to assess whether things are getting better or worse overall, since different indicators may well move in different directions and some may be considered more important than others. One could of course summarize across dimensions to produce a single summary index, but the approach adopted to date has been to eschew such an overall “score” – apart from anything else, because the whole thrust of the European social agenda is to emphasize the multidimensionality of social disadvantage. Such indices are in any case arbitrary in fundamental and unavoidable ways, but this means that some alternative mode of assessment needs to be developed, again within a conceptual framework rather than simply in an *ad hoc* fashion. A third issue relates to the relationship at individual or household levels between the different dimensions – we need to know much more empirically about whether those who are disadvantaged on one dimension are also disadvantaged on a range of other ones, or whether some indicators actually identify a group experiencing a very particular form of disadvantage or exclusion but not generalised deprivation. As Moiso (forthcoming) notes, implicit in the notion of multi-dimensional measurement of social exclusion is the assumption that there is no one ‘true’ indicator of the underlying concept. Instead we have a sample of indicators that tap different aspects of a complex phenomenon. If we are to move beyond the accumulation of a mass of descriptive detail we need to develop a measurement

model that enables us to understand the manner in which our indicators are related to the latent concept.

Framing Targets for Social Inclusion Indicators

It has now been recognized that the objective of greater social cohesion can only be made concrete at EU level by setting targets for the reduction of poverty and social exclusion, similar to those that have evolved in the macro-economic and employment fields as part of the Maastricht process and the Employment Strategy. Social inclusion will only be given the same weight as employment and the macro economy in EU and national decision-making processes when such targets are in place. The Barcelona European Council in 2002 invited Member States to set targets, in their National Action Plans, for significantly reducing the number of people at risk of poverty and social exclusion by 2010. The next stage of the process could well be the setting of EU-wide targets.

A priority for research is thus to address the issues which have to be faced in framing such targets. For example, would it be better to have:

- A common target for all Member States (e.g. poverty risk down to x per cent in all countries?)
- An overall target for the European Union, set in terms of the poverty rate for the EU as a whole (the proportion of the total EU population at risk of poverty?)
- Different targets for each Member State, but aimed at reducing poverty to zero?
- Member States asked to emulate the best performing Member States?

Seeking to set ambitious but achievable and appropriate targets also represents a research (as well as political) challenge because it may often be difficult, in the current state of knowledge, to decide what is realistic. Comparative research has a key role to play here, with the best-performing countries in particular domains serving to demonstrate what can be achieved. Initial conditions in each Member State and national institutional

structures are extremely important, of course, but once again analytic methods such as tax-benefit simulation can help in projecting forward benchmark scenarios against which the level of ambition of targets can be assessed. Research clearly has a major contribution to make in deepening the information base for decision-makers as they grapple with target setting in the social inclusion area.

Work and Employment

Skill Change

Both skill demand and skill supply have grown substantially in recent decades in economically advanced countries. While data on trends in skill matching between individual workers and jobs are scarce, we have tried to establish the cross-national variation in the balance between these trends at the macro level. With some important exceptions discussed above, the macro pattern that emerges is roughly consistent with expectations based on a standard market model. This general picture, however, is much too coarse to allow strong conclusions. In a number of respects, much more research is needed before a fine-grained account of major developments can be achieved. The existing state of knowledge is particularly weak in two areas: assessments of (a) trends in skill demand and (b) of trends, causes and consequences of job-worker matches at the micro level. There is a strong need to establish nationally specific estimates of trends in skill requirements at the level of individual jobs, and to examine how well one can account for such trends by taking structural change into account. In this task, a variety of skill requirement measures should be used in addition to the major indicator considered above, i.e., educational requirements. This indicator has several advantages, but also significant drawbacks. For instance, it is probably tied to changes in national education systems that are partly unrelated to actual shifts in skill demand. It is also important to assess the *distribution* of changes in skill demand.. To significantly expand international comparisons in this area is a central topic for future research.

With regard to job-worker skill matches, cross-nationally comparable information on trends is quite scarce. Before such information is assembled, it is essential to carefully consider conceptual and logical issues in the classification of employees into the categories of overeducated, undereducated and matched. These wide categories are

highly heterogeneous in a number of ways, including experience, on-the-job training, and field of education. This heterogeneity needs to be taken into account before it is possible to arrive at meaningful estimates of matching trends. Further, a central issue is the individual-level dynamics of skill mismatch. To what extent is overeducation, which predominantly occurs among young workers, a temporary state in a career process? How much of the rate of overeducation can be explained by compensatory features such that the excess amount of schooling makes up for a lack of other kinds of human capital? Several data sets now exist that should be very useful in assessing cross-national variations in the answers to these questions.

Finally, a crucial topic to consider is the relation between markets and institutions. A pure market model in which skill supply and demand determine wage inequality is useful as a starting point but is obviously an over-simplification. There are several potentially productive extensions. First, supply and demand do not only influence prices (wages) but also quantities (employment). So unemployment must be part of the picture, as well as employment security. Variations in price-quantity trade-offs are probably to a large extent institutionally determined in ways that are still far from conclusively assessed. For instance, the degree of employment protection and overeducation rates might be positively correlated if employers raise their hiring requirements in the face of increasing lay-off restrictions. Second, the extent of the market may be expected to vary across countries. The well-known sociological distinction between open and closed employment positions, parallel to the economic distinction between markets and hierarchies, should be applied to the analysis of skill evolution. How much of the change in skill supply and demand will influence rates of wage inequality, unemployment and employment security? How much of the mismatch in skills at the individual level can be attributed to career processes and human capital compensation in distinction to more genuine and structural assignment problems?

The Quality of Work

The state-of-the art report showed that simpler deterministic theories of developments in task discretion had been largely disconfirmed by empirical research. Rather there are

significant differences both in levels and trends by country. However, we currently understand very little about the determinants of such variations and this should be a central part of the future research agenda. How far can they be explained by differences in trade union strength, the salience of national policies for improvements in the quality of working life, differences in national training policies, the commitment of employers to human resource management philosophies, the type of management systems implemented in the public sector, industry composition, the rapidity of technological and organisational change or changes in the level of work intensity?

How far do different forms of participation in work form a package so that employees tend to benefit in a fairly generalised way from relatively high or low levels of participation. Or do different types of participation offset each other, perhaps because employers seek to use specific types of wider organisational involvement to reduce individual employee initiative or collective control through trade unions? We need a much better assessment of trends with respect to different forms of job control. And we need to explore whether the determinants of different forms of job control are similar or are specific to each type.

The need to consider different forms of job control is also important with respect to theories of the social and psychological consequences of work conditions. Is it specific types of job control that mediate between work pressure on the one hand and psychological and physical health on the other? Or are different forms of job control broadly similar in their effects and therefore relatively interchangeable? Some earlier research in the United States pointed strongly to an impact of 'occupational self-directiveness' on people's self-confidence, initiative and satisfaction in the non-work spheres of their lives. It would be valuable to explore whether such findings are more widely generalizable and, if so, whether they depend on specific forms of decision-making power

A remarkably consistent finding from national research in a range of countries over the last decade has been that there was an absence of any improvement in job interest in the 1990s. The reasons for the failure of this main expectation in the theoretical literature remain mysterious and clearly raise an important issue for future research. One possible avenue that would be worth following, and that currently has been addressed by none of

the major research programmes on this question, is the relationship between trends in job interest and changes in work preferences. There are at least two possibilities here. The ability to make use of and develop skills may have remained as important as ever for job interest, but there may have been a sharp rise in aspirations, such that even an improvement in skill fails to lead to increased interest. Alternatively, there may have been a shift in work preferences so that different types of factors may now have become central to job interest and these may not necessarily have improved. In that case, an increase in skill levels per se would not guarantee rising job interest. To the extent that changes in work preferences are important in accounting for these patterns, then there is a clear need for much more research into the determinants of work preferences, since they are currently taken as little more than ‘givens’ in the literature.

Comparative research into the implications of different types of control regime for health risks is virtually non-existent. Broad regulative measures such as the European Health and Safety Directive have been implemented in very different ways in the various member states. For instance, Denmark and the Netherlands used it to develop a system of external health and safety audits that explicitly included issues of psychological stress and that gave a central role to the participation of Works Councils in the development and monitoring of health risks. Other countries have continued to rely much more heavily on traditional managerial prerogative over issues of work organisation. Do such institutional differences lead to significant differences in health and safety practices within work organisations? And if so do these have measurable consequences for employee health and the quality of working life?

Training and Career Development

Two principal questions dominate research in the field of continuing vocational education and training (CVET): (1) Who participates in CVET? and (2) What are the effects of CVET? With regard to (1), the participation issue, it is well established that participation in job-related training is highly stratified: those with lower skills or educational attainment are much less likely to participate in job-related training than those with higher skills or education. This “training gap” is found in all advanced industrial societies. However, there is substantial inter-country variation in overall training participation and the size of the training gap between high and low skilled.

There are also important differences in the incidence of training in workplaces in different economic sectors and by size of establishment. It would therefore be useful to examine the extent to which characteristics of countries economic sectors, and workplaces influence the incidence of training: how do these contextual factors mediate the effects of individual characteristics on participation in job related training? A related set of questions concerns the extent to which such contextual factors represent barriers to participation by those with low educational attainment low skilled in job-related training, as well as the identification of workplace, sectoral and institutional factors that could stimulate job-related training among the low skilled.

Research on the impact of job-related CVET, is still developing. Most work today has focused on wage effects of training, reflecting the expectation that training may lead to enhanced productivity and, therefore, increased wages. Key additional effects of job-related training that have received less attention may include employment prospects or security and career mobility or progression.

The lack of development of research on training at the level of the enterprise is understandable, given data constraints, but unfortunate. The workplace is an important site of human capital formation and workplace characteristics are important in influencing both access to and impact of CVET. There is a growing interest in the impact of workplace change on performance of organisations and enterprises (including flexibility, new technology, new working arrangements etc.). A focus on the workplace, and in particular on aspects of social relations and human resource practices in the workplace, is a useful area for further sociological work on training

Job Security and Precarity

In an earlier state-of-art review on research on job insecurity, we have distinguished four key thematic areas which are current issues on comparative and national studies and which could be interesting research topics for our network. First, measuring the growth of job insecurity in Europe through various indicators and various data sets, in order to combine objective and more subjective approaches of precarity. Secondly, it seems relevant to analyse the national regulatory regimes of job flexibility to understand the differences of job precarity between countries. We will thus present the main theoretical

or empirical findings of surveys on the impact of temporary employment on working conditions. And at last, we will show how longitudinal studies can be interesting to study the impact of flexibility on individual labour market transitions.

To evaluate the growth of job insecurity in the different European countries, we can use different indicators and different datasets. We can measure the growth of job precarity through the growth of temporary employment, using as it is commonly done the harmonised European indicator, more or less based on labour contracts, with the Labour Force Surveys. But the growth of job insecurity can also be measured with the risk of unemployment, to evaluate the spread of instability into permanent employment. The Eurobarometers made in 1996 and 2001 with a more subjective approach of job precarity can be useful to compare the differences of feeling of insecurity and precarity across different European countries.

International statistical comparisons on temporary employment are difficult, for both economic and statistical reasons. “The categories of temporary jobs differ significantly across OECD countries, both in terms of their numerical importance and the legal and customary rules surrounding their use. The adequacy of national datasets for differentiating temporary from permanent workers also varies”.

The growth of job insecurity can also be measured with the risk of unemployment, to test the spread of instability into permanent employment. Since 1970, the probability for employees to lose their jobs and to experience unemployment has increased, and is linked to the sectorial changes of the economy. If we only study the evolution of industry, job loss has been stronger in countries, which were strongly industrialised. The long-term trend of shifts out of manufacturing is typical of several European countries, as Belgium, the United-Kingdom, Sweden, France and the Netherlands, which have lost 10% of their employment during the 1980s or in the 1990s. Job loss in this sector has been weaker in Southern countries: Portugal, Spain, Greece and Italy.

The risk of unemployment can be analysed retrospectively on the experience of having suffered from unemployment in the previous five years. The risk of unemployment can also be measured with a more subjective indicator. These surveys asked: “How likely or unlikely is it that you will lose your job or decide to leave your employer for some

reason over the next 12 months?” Answers “very likely” and “quite likely” have been gathered in the same category. But there are many reasons to lose one’s job or to leave one’s employer, and some are not linked with business cycle. People can choose to create a firm, to take care of their family, or can retire. In these surveys, people had to explain the reasons for this feeling, and two reasons are connected to layoffs.

To test the influence of the economic cycle on vulnerability, this study should be completed by a study on objective risks of job loss and on transitions between employment and unemployment, through national (or European) Labour Force Surveys or through ECHP (European Community Household Panel).

To understand the differences between countries and the trends, revealed by harmonised indicators and datasets, it seems necessary to develop a societal analysis of job security and precarity, in order to distinguish different national regulatory regimes of job flexibility. This study can thus use national statistical indicators and datasets, which reflect this societal coherence. Job “precarity” is not a universal category, although it has become widely used in the French vocabulary or in some European community surveys. It is a social construction, and even more a ‘societal construction’ because its meaning depends mainly on the welfare regimes and the regulation of labour markets. Cross-national comparisons can reveal that the different levels of temporary work, and the degree of job precarity associated with temporary employment depend on two main institutional dimensions: “unemployment welfare regimes” and industrial relations, because the actions of trade unions can reinforce or reduce the insiders / outsiders effects of the deregulation of labour market.

Is job precarity accompanied by bad working conditions and, more generally speaking, by dissatisfaction at work? There is no automatic answer to this question. There are people who, although they have an unstable job, genuinely enjoy their work and are pleased to put a lot of effort into it. Having defined *secure integration* as the combination of job stability and the quality of work measured objectively and subjectively, We can distinguish three types of deviation from this model: *insecure integration* (‘intégration incertaine’) concerns employees who have an unstable job, but working conditions that make them feel a certain level of satisfaction at work; *constrained integration* (‘intégration laborieuse’) concerns employees with a stable job,

but who suffer the weight of heavy constraints in their work, leading to great dissatisfaction; finally, *disqualifying integration* ('intégration disqualifiante') corresponds to the combination of job instability and hard working conditions resulting in a pronounced dislike for their work.

Temporary Jobs: "Springboards" or "Precarity Traps"?

Longitudinal methods seem to be the only way of assessing occupational transitions, to see whether temporary jobs are "springboards" out of unemployment, corresponding to longer trial periods, or whether they are "precarity traps", corresponding to new forms of employment, involving a real increase in the flexibility and precarity of occupational paths.

Quantitative studies should be combined with qualitative studies of individual subjective experience of temporary contracts, because segmentation theories are focused on employers' strategies and not on the experience of employees. Jobs that appear precarious to the external observer may not be experienced as such by the jobholder.

Finally, we can encourage the development of qualitative studies on employees concerned by flexible contracts, in order to understand how they feel about them and manage to fit them into their occupational paths, and to relativise the sometimes improper assimilation of "atypical job" and "precariousness". It would no doubt be interesting to link objective and subjective indicators of precarity, which make the analytical framework more complex. "There is a key question which remains very difficult to answer and is linked to the question of subjective as against objective potential definitions of employment precariousness. Obviously not all job holders of atypical – or even of precarious – job positions feel in a precarious position. On the other hand, stable job holders may feel precarious in their positions".

It therefore appears to be particularly appropriate to develop longitudinal studies, combining qualitative and quantitative factors, in order to understand individual transitions in different countries. As these recent studies of the case of France have shown, different discriminatory variables - age and qualifications, but also gender, class and ethnicity - seem to have a key role in explaining the trajectories and understanding

individuals' experiences. The type of occupation can also be an important factor in analysing the increasing flexibility of the labour market, as the controlled flexibility of qualified professionals with transferable competencies carrying out missions in "occupational markets" (communication-advertising, expertise, finance, information technology, artistic activities) has little in common with the flexibility found in the market for unskilled workers. Finally, a point that is obvious to economists but sometimes underestimated by sociologists, we must integrate economic cycles into our analytical frameworks for job precarity, as shown by the research into the transitions from school to work of young people.

Work and Family

A recent "demand-side" explanation for the possible increase in women's market participation is seen in *labour market flexibilization*. 'Flexible' or 'atypical' employment is said to facilitate the reconciliation of paid work and family life as these forms of employment may provide greater opportunities to devote time to the family when domestic pressures are greatest, but it remains unclear whether this is achieved at a high long-term cost in terms of people's careers. Little is known for the moment about the role of non-standard employment for the current and future employment chances of men and women and the importance of existing national structures.

Furthermore, given that families have a certain capacity to manage social risks and to cope with market insecurities, consideration must be made of the household level not just to understand the generation of specific employment patterns but also their potential consequences of the families. For the moment it remains unclear to what extent the "new" forms of employment contribute to a further polarisation of work-poor and work-rich or precarious and stable households. How far does the capacity of a couple to compensate for employment/income loss of one partner go and what are the structural determinants for this? Do couples tend to become more equal also in terms of employment positions or do they differentiate "employment-roles", though no longer in terms of paid work - unpaid family work?

A further key issue is the costs and benefits in terms of *family welfare* of different family employment patterns. From an individual point of view a continuous work career might

be evaluated very positively, however, it may have harmful repercussions for family welfare. Some evidence for instance points to a negative effect of women's full-time employment during the early child-rearing years on children's attainment, other research emphasises the positive aspects of increased and stable household income on children's development. But we understand very little about the *mechanisms* that underlie this and the factors that determine different forms of family adjustment to the pressures of dual labour market participation.

Family

The importance of studying children in family research

In family research, studies of the lives and conditions of children and adolescents are important. This is because they are most dependent on the family and because they also influence the wellbeing and scope of action of other family members. There are several studies that summarize the available evidence and indicators used to study young people's lives, both in the U.S. (Hauser et al 1997) and for Europe (Micklewright and Stewart 2000). From these comprehensive reviews one can draw a number of theoretical and methodological conclusions. One is that the literature on children's welfare and wellbeing are overwhelmingly relying on indirect and aggregate measures. Children's mortality, household poverty rates, percentage of GNP spent on education, enrolment in day-care, coverage of children by health insurance, teenage birth rates, and so on, are the most prevalent measures of children's welfare. It is only rarely that researchers pay interest in (or have access to) children's own reports about their lives.

A third point, related to the first two, is that children are rarely seen as actors that would benefit from resources. Instead, they are most often analysed as passive objects that either react to external stimuli or could be more or less successfully socialized or adjusted. In fact, much previous research has treated children mainly as a problem: focus has been on deviant behaviour or "maladjustment". These studies have a long tradition within psychology, sociology and criminology, for example.

A final point is that children's lives, like adults, must be studied using a number of indicators, as is regularly done within the resource-oriented tradition of welfare research.

The importance of studying children's well-being multidimensionally has recently been stressed by Thornton et al (2001, pp. 437-438), as the first out of 18 recommendations for research on children by the "Family and Child Well-Being Research Network" in the U.S. This is the view also taken by the large international research group on children's well being who lists five domains of children's well-being and 49 indicators of particular relevance (Ben-Arieh et al 2001).

State policies to support work-life balance

There is a strong need for ongoing research on the role of social policies in redefining the work-family system and the balance between income and care needs. European countries have quite different institutional and cultural patterns with regard to the respective responsibility of family, state and community in the provision of care for dependent persons, and there is a strong tradition of research into these arrangements using both conventional and feminist approaches. It is important to track how these different institutional and material frameworks cope with challenges to existing provision caused by increases in women's labour market participation (which reduces the amount of available unpaid caring work) and the increasing quota of frail elderly in the population (which increases the demand of intensive care). Existing knowledge on welfare state configurations should be supplemented in the light of the rapid developments these two phenomena. Research at this broad level also needs to consider the effects of welfare state restructuring on the balance between family, market and state. The impact of this should be assessed comparatively, but also with regard to different social classes.

At a more specific level there is need for research on how state policies facilitate or hinder different family-work arrangements. While there is abundant cross-sectional macro level evidence on the link between policy provision and labour market behaviour of men and women, there is a need for further longitudinal analyses of these processes and the longer term outcomes within a comparative framework. For example there is a significant literature on the pay penalties experienced by women who take time out of the labour market within individual countries. However comparative work can highlight which institutional settings reduce this penalty and can also provide new insights into the medium and longer-term effects on factors other than pay alone such as career mobility.

Further analysis is also needed on the policies that facilitate men's involvement in their families and contribute to a less gendered division of labour in the household. Existing paternity and parental leave is highly varied across countries and but some of the factors which encourage the uptake of leave schemes by fathers have been identified in national level research (see Russell 2003, Deven et al 1998 for reviews; O'Brien & Shemilt, 2003).

The level of public provision and/or subsidy of childcare are highly variable. However data on childcare is usually collected in national surveys and is generally not harmonised. There is little if any cross-national research or comparative data on the use of informal sources of childcare yet national level studies show that this is an extremely important element of the story (e.g. see Deven et al 1998). A further issue of crucial concern and for which there is little evidence to date is the quality of childcare in both the formal, regulated childcare sector and the informal, unregulated sector. This is a key issue for child wellbeing and links into the wider concern in family research about including children as stakeholders.

Social Cohesion

Immigration

There are multiple signs that immigration will continue and might even grow in the European Union. Demographical perspectives lead to pessimistic scenario on the middle term. Shortages in certain sectors of the labour market for both qualified and non-qualified workers are possible in spite of the generally quite high level of unemployment. On the other hand, the push factors will continue to be important: poverty, wars, instable political conditions in numerous countries which were among the driving factors for migration in the last twenty years, will still be the case.

So there is a need for a European policy that will better fit the challenge of immigration flows and their consequences. In spite of continuing illegal migration, the main feature of the European policy has been closure and much more attention has been paid to

controlling the European frontiers (Schengen) than to integration of immigrants in Europe. As a matter of fact, managing immigrant integration has remained until very recently in the hands of the Member states, so that immigration as well as integration policies differ widely in Europe. Citizenship policies, which are important for integration, considerably differ in the different member states, so do social, economic and political rights accorded to the immigrant population. The European construction has led to a clear differentiation between immigrants who belong to a Member state and immigrants who do not. These conditions hardly make Europe a favoured competitor to the US, which manages to attract the best and the brightest from all over the world.

Future Agenda

The existing research literature suggests that ethnic disadvantages emerge at the point at which high cost decisions are to be made. Therefore, crucial transitions in the life course seem to be the most promising point for analysis in order to increase our understanding of the mechanisms fostering the persistence of ethnic inequality. Above all, transition to higher education, transition from education to first employment, and first marriage are such important life junctions, at which immigrants might fail in making decisions comparable to the mainstream population and hence get penalised in the longer run. Therefore future research should try to focus on these crucial transitions with adequate research designs (prospective longitudinal data) and with adequate research methods.

Transition to Higher Education

A resource-oriented approach offers a good starting point for shedding light on causes of differences in the educational decision-making of immigrants and the native-born. Multiple explanations can be offered on why some migrant groups fail to make necessary investments in the children's education. First of all, they themselves may lack educational experiences, which are necessary for assisting their children, for granting them direct support and help, or for providing useful information about the functioning of the educational system in general. Comparing parental educational expectations, educational strategies and concrete investments to help their children is fruitful (Brinbaum 2003). Second, occupational positions of parents might be relevant for their investment decisions. Parents' occupational status directly influences family financial

resources, determining the significance of the burden of costs connected to educational attainment. Parental occupational experience may also bring significant information benefits and serve as an important success model for their offspring (Erikson and Jonsson 1996). Third, not only parents but also immediate networks might play a role in educational decision-making. In recent research the role of ethnic segregation for magnifying ethnic inequalities has been largely emphasized (Borjas 1992; Loury 1977; Lundberg and Starz 1998; Massey and Denton 1993).

Another important set of ideas is that associated with Ogbu (1978, 1996) who has focussed particularly on the educational fortunes of blacks in America. American blacks, with their history of slavery, have the character of an involuntary minority and this experience, and their caste-like situation in the American system of stratification, is argued to lead to cultural inversion, with a rejection of the educational ethos of the dominant groups in society. (For an excellent review see Rothon 2004). While most groups of immigrant origin in Europe can be regarded as voluntary. Ogbu suggests that widespread experience of discrimination may lead some immigrant groups such as Black Caribbeans in Britain (and by inference Turks in Germany or North Africans in France) to exhibit some of the same features as African Americans (see Van Zanten for similar discussion of the situations of Maghrebians in France). But rejection of the school is not the only issue. Other form of conflict situation may arise. For instance in France, Maghrebian youth, following their parents ambitions, show more disappointment than other groups when they are not successful at school, thinking they were underestimated (Silberman and Fournier 1999).

Transition from Education to Working Life

Results of field experiments in Britain, France and the US show that overt discrimination, statistical discrimination or indirect discrimination are likely to be important ingredients in the overall ethnic penalties experienced by some groups. The economic theory of discrimination introduces the notion of an employer preference for discrimination that puts limits on the principle of maximized utility (Becker 1957). Concerning ethnic origin, it suggests that employers have a “taste” for discrimination driven by certain preferences to conform to public opinion that tend to reject foreigners. An alternate line of theory holds that employers behave in a discriminatory fashion in a

context of imperfect information with the consequence that they anticipate the performance of an individual from the attributes ascribed to the average population member (e.g. education) and from previous personal experience.

An alternative line of investigation focuses on actors' perceptions. Some variants in the lineage of "statistical discrimination" models allow individuals to anticipate discrimination, e.g. Barron et al (1993). In a way, they look like Ogbu's analyses to sociological issues. Frustrating ambitions at school, feelings of discrimination, pessimistic view about future, proved to higher the probability of being unemployed some years later (Silberman and Fournier 1999 and 2004).

Discrimination is arguably not the single reason behind ethnic penalties. It might well be that immigrants lack host-country specific resources necessary to succeed in the labour market and above all, cultural and social capital. First of all, since certain culture-specific abilities, including eloquence or habitus, are necessary for attaining higher occupational positions, immigrants might be automatically disadvantaged (Granato and Kalter 2001). Second, immigrants might lack specific knowledge about the functioning of the labour market, the knowledge necessary to succeed in its higher echelons.

It is well known in the economic literature that social networks play an important role in the labour market, as many jobs are found with the help of friends and relatives. The reason for this can be seen in the fact that, on the one hand, network information on job offers is inexpensive for the job seeker promising a comparatively high probability of success. On the other hand, referrals might be important for the firms as a comparatively valid and likewise inexpensive screening device (Granovetter 1973; Montgomery 1991; Wilson 1987). Ethnically homogenous ties give access only to the information and resources available in the ethnic community and, given the existence of ethnic stratification, may not be as helpful as ties to the indigenous population (Portes and Rumbaut 2001)

Spatial Segregation

Urban spatial segregation and its implications for social inequality and disadvantage are topical issues in European social research and social policy debate. The limited work so

far carried out points to the conclusion that European cities do not have racial ghettos of a type similar to the black ghettos found in the US. This finding should caution us against extrapolating from American research in order to make statements about the spatial aspects of disadvantage in European cities. It is also possible from existing European work to frame interesting hypotheses about mechanisms, which might connect urban spatial segregation with other aspects of urban disadvantage. These hypotheses suggest that efforts to strengthen the data and research base in this area could be worthwhile, even if it is difficult at present to see how progress might be made in that direction.

Economic Exclusion and Social Cohesion

Even prior to EU enlargement, a large body of literature has argued for a need to move from a focus on income poverty to a concern with social exclusion and from a unidimensional to a multidimensional perspective. Such a perspective questions whether a focus on income is sufficient and argues for a consideration of a wider range of indicators of economic and social circumstances ranging from current living standards to housing health and quality of environment. With enlargement the case for such a broader perspective has become more compelling. The relative income poverty perspective suggests very little change in the pattern of differentiation with enlargement. Eurostat estimates that the at-risk-of-poverty rate in 2001 (measured at 60 per cent of national median household income) was 13 per cent overall in the ten new member states compared to 15 per cent in the EU 15. In national relative terms, therefore, the new states have no more poverty than the existing member states, and their entry brings about no addition to the average level of poverty in the Union. However, any approach that focuses on actual levels of living standards is certain to demonstrate greater degrees of inequality than heretofore

While such inequality may appear to be outside the EU social policy remit, there is another perspective on socio-economic disadvantage in the EU – regional policy – where the divergence in living standards between member states and regions is the main focus of interest. In EU law, regional policy is defined as an EU competence, as laid down in Title XVII, ‘Economic and Social Cohesion’, Articles 158–162, of the EC Treaty. This competence confers on the EU the power to distribute funds between the EU regions for

the purpose of promoting the development of the disadvantaged regions. The regional perspective defines the majority of the ten new member states as disadvantaged – all but Slovenia and Cyprus have a GDP per capita below 75 per cent of the EU25 mean GDP per capita. Greece and Portugal are also disadvantaged in these terms, as are a number of individual regions within the other member states, though not to the degree found in the new member states. The accession of the new states, therefore, according to this perspective, sharply increases the overall level of socio-economic disadvantage and inequality within the Union (European Commission 2004). The policy goal in this context is to promote economic and social cohesion by bringing about convergence in economic development and living standards between the rich and poor member states and regions of the EU (European Commission 2004).

In seeking a basis on which these two EU perspectives might be integrated, it is useful to focus on the concern with social cohesion. We have defined social cohesion in terms of relational connectedness and a sense of a common membership of a given community. This allows one to maintain the conceptual distinction between objective and subjective dimensions. This has benefits in terms of conceptual clarity and highlights the need to explore the relationship between individual life-chances and the inter-personal processes of social cohesion on the other.

A recent paper by Whelan, Fahey and Maître (2004) provides an illustration of how these issues can be empirically addressed by using latent class methods to develop a measure of vulnerability to economic exclusion that takes into account not only relatively low income but also current life-style deprivation and experience of economic strain. Having done so, and established regional variations in the risk and patterning of vulnerability, they proceed to consider how economic exclusion defined in this relatively restricted sense is associated with wider patterns of social exclusion incorporating factors such as health, housing and environment and the extent to which this varies by region. Finally, they address the issue of the impact of economic exclusion on social cohesion and the extent to which regional variations in such cohesion can be accounted for by corresponding variations in levels of economic exclusion and in the consequences of such exclusion

Social Capital

Many of the criticisms of the concept of social capital are telling and justify a cautious approach to the field. However, research on social capital is potentially rich both as a way of countering what is arguably an overemphasis on individuals in much economic literature, and as a means of capturing some of the complexities and interrelatedness of the modern world. In addition, there is a growing body of European data, which could be bought under a social capital heading. Possible directions of future research could include:

(1) How should we measure social capital? How can we better assess the impact of social capital on economic performance and other measures, for instance, crime, health and happiness? These are fundamental questions if we are to determine what role, if any, the state might play in promoting social capital. The standard measures for social capital — membership or participation in formal or informal networks, levels of charitable giving, or levels of trust — hardly seem up to the job. Not surprisingly, therefore, much of the discussion is about definition and measurement issues. The measurement question also includes the need to distinguish more carefully between different levels at which social capital might work – the individual level, the group level, the community level and the society at large – and to specify appropriate measures at each of these levels. A specific problem, however, is that social capital depends heavily on the context. Hence one should not assume that indicators of social capital from more homogenous societies would work just as well in ethnically plural societies (Dowley and Silver 2002)

(2) From the perspective of research on social inequality, one of the most interesting questions is the distribution of social capital across advantaged and disadvantaged social groups. Do disadvantaged individuals or groups command enough social capital to compensate their lack of material resources? Or is social capital more widespread in the economically well-off social strata? If the latter were the case, social capital, particularly the availability of support networks, would deepen existing inequalities. Moreover, research should examine the differential impact social capital might have in different strata of society.

(3) *We clearly need to know more about the determinants of social capital at the individual, community and societal level.* A crucial policy question is to what extent social capital can be created or destroyed by good or bad government practices. Empirical findings from cross-national research that generalised social trust is related to democracy, good government and absence of corruption (Paxton 2002, Delhey/Newton 2004) indicates that it is likely to be influenced by the social institutions and structures, particularly those of government and the public sector. Future research should concentrate on the channels through which political structures and practices influence social capital in communities and the wider society.

(4) *The problem of bridging and bonding associations deserves further investigation.* This question requires information about what kind of associations create in-group trust only, and what kinds of associations are able to create both in-group and out-group trust. If the aim of policy-makers is to strengthen social capital not of specific groups, but of communities or even the society at large – truly generalised social capital – to identify bridging associations is crucial. As highlighted by the recent disturbances in the Netherlands, this question is especially relevant for bridging social distances between ethnic groups. Since European societies have become immigration countries and their populations becoming more and more fractionalised along ethnic lines, the need for trust that includes other ethnic groups is particularly important, but the ways how this form of universalistic generalised social trust is created are currently not well understood. For the European Union at large, the virulent problem of ethnic relations within societies is mirrored at the supra-national level (Delhey 2004a, 2004b)

(5) *We also need to know more about trends in social capital through generational replacement.* Putnam's fear of the passing of the 'civic generation' might apply only to America, but currently we know little about age-specific and cohort-specific civic engagement and trusting attitudes in Europe. Particularly missing are cohort analyses that distinguish between socialisation, life-cycle effects and period effects.

(6) *A more specific issue is connected to the rise of the internet and the movement towards an e-society.* Increasingly, as people become members of virtual communities; face-to-face contacts with close people are supplemented or substituted by indirect and often very distant contacts via email and internet. Crucial issues are, first, the extent to

which virtual networks supplement or substitute for face-to-face networks; and second the question of functional equivalence: do virtual networks deliver social support and create sense of community among its members in the same way as face-to-face networks? If they are not functionally equivalent, what are the impacts on aggregate social capital?

Section 5: Dissemination and Exploitation of Results

Seminars and Workshops

Full details of the following workshops and seminars have been provided in period reports.

Workshop 1: A Review of the State of the Art, Mannheim April 9-12 2003

Seminar 1: Methodological Issues in Comparative Analysis, Nuffield College 25-26, September 2003.

Workshop 2: Comparative research on Inequality and Quality of Life: Integrated or Diverse Measures for East and West, University of Tartu, 4-6 December 2004.

Seminar 2: Using Comparative Data to Develop European Social Indicators. Paris, 17-18 May 2004.

Workshop 3: An Agenda for Future Research, Swedish Institute for social research, University of Stockholm, 24-25 November 2004

CHANGEQUAL Website

<http://www.nuff.ox.ac.uk/projects/changequal/>

Development

Over the period of the Network the Website was established and continuously developed. These developments in the CHANGEQUAL website have allowed it to play a more vital part in the Network's co-ordination and activity. These developments can be split into four parts.

1. Look and Feel

The visual appeal of the site has been greatly improved. The very textual front page has been replaced with a graphical portal. This makes it easier for both regular and new visitors to the site to find information on the site quickly. As you browse the site the navigation has been improved so the user can jump to different parts of the site easily. Where possible the pages have been split into blocks (components) so that common display elements, such as paper lists can be re-used on many pages, thereby eliminating the need to rewrite the HTML for each new use. This ensures that the look and feel remain consistent across the site and as importantly allows pages that interact with the database to be very quickly created.

2. Functionality and Interaction

The original web site was built around the idea that members of the Network would login and work within their own space. From here they would be able to manage their uploaded papers and work with an events calendar. The original database has been extended so that more functionality has been added. Each member of the network has a database driven home page, that they can easily maintain themselves. The paper database has been extended to support conference as well as working papers and provides a high degree of flexibility in how and where a paper is listed. The paper database is also fully integrated with the personal home pages, theme pages, institutional and conference pages. This allows relevant paper listings to be displayed on each page that requires them.

A section for conferences has been added which allows information about past, present and future conferences to be easily found. These are linked into the paper database that allows participants to upload and download papers prior to the conference.

Each theme page now includes a discussion board.

3. Wider User Base

The user base of the site has been extended to include students who are based at the member institutions.

4. Most Recent Development

Over the final months of the CHANGEQUAL project, we have been working on re-writing the core code that has been running the site. This has allowed us to port the majority of the site to .asp .Net. This has made the task of maintaining the site easier. The site will now be incorporated as sub-portal within the new EQUALSOC site.

The last year of the project has seen the use of the site grow. There are currently over 140 active users of the site, with over 130 papers now accessible via the site. The site has been used both as an internal mechanism for communication within the network as well as for the dissemination of research work.

As well as re-writing the underlying code that runs the site, several improvements to the design have also been made. These have centred on the use of more Cascading Style Sheets to control the lay out of the site. This has allowed us to generate print versions of most key pages on the web site without the need for special print only versions. Improvements have also been made to the working paper listings, to make them easier to navigate.

A key reason for the increase in use of the site over the last 12 months has been a proactive approach to encouraging members of the network to use the site. This, we feel, is vital to the success of any similar web site. Much effort has been put in to helping members to upload papers and keep their information up to date.

The final efforts of this project have been to prepare the CHANGEQUAL site to become a sub-portal of the new EQUALSOC site. This will allow the purpose and dissemination of information from CHANGEQUAL not to be lost and still keep a high degree of relevance. Importantly the work that has been carried out in developing the

CHANGEQUAL site can be taken forward to develop a much larger and more complex research network site.

BOOK PROPOSAL

Employment Systems and the Quality of Working Life

It is planned that that the material relating to work and employment generated in the network be published in book form. Details of the proposal are as follows.

The quality of working life has been central to the sociological agenda for several decades. In part as a result of the initiatives from the European Union it has more recently become an issue of growing political salience. However, research to date has in the main focused on individual countries and this has made it difficult to address the question of whether the trends and determinants of the quality of work might be affected by institutional structures, cultural values and policies that are distinctive to particular societies. Recent theory has suggested that there are important national variations in institutional systems of skill formation and, given the general assumption that there is a close link between skills and other employment conditions, this should imply major societal variations in work quality.

This book draws upon comparative survey evidence from European Union countries to assess whether inter-country institutional differences do lead to divergent trends in the quality of working life.

OTHER PUBLICATIONS

The remaining output of the project will be published as journal articles and book chapters. A list of journal articles, book chapters and working papers relating to the CHANGEQUAL theme published by network members or associates during the lifetime of the network is provided in an Annex in Section 7.

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Section 6: ANNEXES

CHANGEQUAL AGREED DEIVERABLES		
Work Package 1	Input to Workshop 1	Delivered
Work Package 2	Workshop 1 on State of the Art	Delivered: Mannheim April 2003
Work Package 3	State of the Art Document	Delivered
Work Package 4	Inputs to Seminar 1	Delivered
Work Package 5	Seminar 1: Methodological Issues in Comparative Research	Delivered Oxford, September 2003
Work Package 6	Inputs to Seminar 2	Delivered
Work Package 7	Seminar 2: Utilising Comparative Data to Develop European Social Indictors	Delivered: Paris, May 2004
Work Package 8	Input to Workshop 2	Delivered
Work Package 9	Workshop 2: An Agenda for Future Research	Delivered: Stockholm. November, 2004
Work Package 10	A Programme for Future Research	Delivered
Work Package 11	An Agenda for the Development of aNetwork Excellence	Delivered

List of Publications:

Articles in Books

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12. Luijkx, Ruud, Walter Müller, and Reinhard Pollak "Persistent Inequality? A Descriptive Reassessment of the Evidence for European Countries." European Societies or European Society? EuroConference on Causes and Consequences of Low Education in Contemporary Europe Granada, Spain, 18 - 23 September 2004
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