

## **THE ACTION OF THE ECONOMICAL AND FAMILIAL FACTORS OF SOCIAL DIFFERENTIATION. CONSEQUENCES FOR EDUCATIONAL POLICIES**

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***Abstract:** This article analyzes two of the mechanisms of social differentiation and the means in which they function in social practice: the distribution and redistribution of incomes, respectively the dynamics of family life. The references to the studies of Amartya Sen and Carolina Dewilde gave me the possibility to approach critically a series of aspects of the factors which contribute to social differentiation and to reveal the correlations and interdependences which intervene in this process. Based on this ground, I have formulated a few ideas regarding the controversial problem of the concept of cumulative advantage and disadvantage, as well as the possible consequences for the understanding of its means of manifestation in the practice of sociological research and in the social educational system in our country.*

**Key words:** *social differentiations, incomes, social chances, education, cumulative advantage.*

### **Introduction**

The differentiation of individuals and groups is a process which implies effects determined by natural factors, as well as by social factors. The basic idea is that every society is structured in an assembly of social positions which are associated with obligations and functions, with the obligations being fulfilled by the members of society (cf. Cherkaoui, 2006, p.113).

Such an approach highlights two fundamental aspects: on the one hand, the social positions don't have equal importance for society, a situation which justifies the application of certain differential rewards; on the other hand, we are talking about the distinctions which can be operated between differentiation, ranking, evaluation and gratification.

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As it was expected, the explanation of these processes was the object of different theories which brought under scrutiny the natural inequality of individuals, the property, the level of incomes, social ideologies and policies, the chances of education and social affirmation, the system of institutions, the dynamics of family life, the life style, ethnic or gender affiliation and the list can continue.

From this complexity of factors, this article will focus upon the influence of economical resources and the family in the process of social differentiation, as well as on the main consequences which take place for the action of the other factors which contribute to social stratification.

### **The distribution and redistribution of factors**

The theories of stratification especially focus upon the fact that the main factor of social differentiation consists in the unequal repartition of the .. of society, whether we refer to economical goods or services, or to the level of incomes obtained from different activities developed by the members of society.

Although the economists and sociologists noticed the tendency of certain significant increases of the real income of the majority of the population, their distribution remains unequal, affecting especially the social categories from the basic levels of society, where we actually meet the most serious phenomena of destitution.

Approaching these issues from a more general perspective, Amartya Sen (2000) thinks that the evaluation of the real income meets a series of difficulties due to the diversity of human needs and of the social surroundings which intervene in this process. Among the sources of variation between the real income and the well-being that can be obtained, the author identifies the following aspects:

- The heterogeneity of the physical characteristics of people connected to age, sex, risk factors, disease or certain disabilities which determine different individual needs. Even if thorough the different mechanisms of social redistribution one endures a certain compensation of these disadvantages, they can't be fully corrected by means of the redistribution or transfer of such incomes.

- The variety of the conditions of environment (from the climatic surroundings to the geographic position), directly influences what a person can obtain from a given level of income, just as pollution and the risk of diseases from certain areas clearly alter the quality of life that the inhabitants from these regions can enjoy.

- The great majority of social conditions are those which directly or indirectly intervene in the practice of conversing incomes and personal resources in constitutive elements of the quality of life. Thus, we can include

aspects regarding the educational system, medical assistance or pollution, as well as those referring to the nature of communitarian relationships or certain social facilities.

- The differences which are recorded in the system of interpersonal relationships and the models of social behavior determine a great variety of systems of values and of the evaluation standards of certain social conventions and practices. These can be found in the individual's possibilities of using his personal resources in order to obtain self-respect in front of the other members of society.

- The distribution within the family, namely the means in which the obtained income is split among those who earn it and those who don't is an important factor in the correlation of personal chances with the general level of the family's income. "The well-being or the liberty of individuals within a family, writes Sen, will depend upon the means in which the income of the family is used to promote the interests and objectives of different members of the family (...). The distribution rules followed within the family (for instance, the rules according to sex, age and perceived needs) can constitute a major difference in the accomplishments or fails of individual members" (2000, p.100).

A special place in Amartya Sen's analysis is occupied by the differences in the individual capacities as opposed to the level of incomes. Since these capacities are difficult to measure, in this field more approaches have been designed: some take the form of direct evaluation by comparing the vectors of functions or capacities, other regard the comparison of different capacities, some involve interpersonal comparisons of incomes, others focus upon the incomes earned within the family.

By examining the possibilities through which the incomes of the family can be used in determining human capacities, the author draws attention upon three major demands: in the evaluation of the level of the equivalent income we must take into account the means in which the income influences the relevant capacities, because the conversion rates must depend upon the basic motivation of the evaluation of the capacity; in the practice of research one must make the difference between the income as a unit that measures inequality and the income as a means of reducing the inequality at the level of capacities, because the transfer of incomes isn't always the best means of counteracting inequalities; although the income represents an important tool, it can't provide sufficient information upon the concepts of the "gaps" of income upon the social space involved.

Based on these aspects, A. Sen brings a series of arguments referring to social justice and the phenomenon of destitution, a phenomenon which can't be regarded solely as a simple insufficiency of income, but especially as a deprivation of the capacities that a person must possess. In her opinion, the

arguments in the favor of approaching destitution from the perspective of individual capacities are: as opposed to the low income which has an instrumental value, the concentration upon the deprivations generated by the lack of income has an intrinsic importance upon capacities; the income isn't the only instrument that generates capacities – in this field there is an array of factors and influences; the instrumental relationship between a low income and low capacities is different among individuals as well as among families and communities seen as a whole.

For our discussion the third aspect has a special importance for the evaluation of the political action focused upon the reduction of inequality and destitution, for at least the following reasons: the relationship between income and capacity will be seriously affected by the age and sex of the person, by the health state of one individual or the other, by geographical localization, by the health state and other variations that the person can not control; the disadvantages met in the conversion process of incomes into capacities can be more intense than what we see in the space of the income, especially when we talk about old or disabled people; in cases when the income of the family is used disproportionately for its members, it is possible that the size of the privation applied on the neglected members can't be properly reflected from the perspective of the family income; there are economical and social cases where the relative privation regarding the incomes can determine an absolute privation regarding the capacities and the participation to the life of the community, as in the case of countries where, in order to obtain the same social functions, an increased level of incomes is necessary.

The idea that the American economist and sociologist supports is, on the one hand, that of a distinction between the inequality of the income and economical inequality, the relationship between the inequality of the income and the inequality existent in other spaces being owed to different economical differences “other than the income which affects the inequalities from the level of the individuals' advantages and fundamental liberties” (2000, p.145).

On the other hand, it draws attention upon the fact that the retribution of the income or the supply of public services for people who are disadvantaged from the point of view of incomes can have negative effects for the functioning system of market economy. Even if in modern societies there are certain normative principles the services of medical and social assistance or of educational facilities, they can be supported through social policies only to a certain point, for the simple reason of limited economical resources.

Amartya Sen doesn't forget to discuss a series of deformations which appear in the supply of certain help and social facilities: due to the asymmetry of information, there is the possibility of including the really poor people among those considered poor; in order to stimulate the activity of individuals who are able to work, the level of social support must be adjusted so as to

determine an economic behavior in accordance with the principles widely accepted by society; the solicitation of a person to be identified as poor can have effects upon self-esteem or upon the respect shown by other people, as well as upon the emergence of certain phenomena of marginalization and social stigmatization; because the beneficiaries of social support aren't strong enough in their political support, they will lack the programs of social action or to maintain the quality of the services provided, thus encouraging corruption and state bureaucracy.

### **The effects of family dynamics**

As a social institution, the family is made up of a set of roles reciprocally dependent, while being an important factor in the differential spread of the sources of society which are transmitted to future generations. From this perspective, we can suppose that if somebody is a member of an elite family will inherit, next to a part of the economical resources, the social prestige connected to its name with the entire carousel of privileges which emerge from here.

Referring to these aspects, the social theories insist upon the differentiations instituted upon the position of the family in the stratification system, the individuals' characteristics who are to be socialized and the children's own socialization. The starting idea is that the parents' socio-economical status and their living conditions manifest themselves on the content of children's socialization. Thus, the use of symbols, responsibility, personal initiative and the complexity of work etc are aspects which are connected to the specific of high and middle classes, while the manipulation of physical objects, task standardization or subjection to authority are typical to low classes. Numerous studies have highlighted the idea that the familial environment significantly influences the educational and professional results of children and youths, as well as the modeling of their education competences. Moreover, these studies have shown that the aptitudes for learning have a strong effect upon educational success and upon professional accomplishment, independent of the social origins of the family. In other words, the educational system and the familial environment influences status accomplishment mainly thorough the effects transmitted by the psycho-social processes, without excluding the aspects referring to chance equalization and those of personal income.

Caroline Dewilde (2003) goes even further and suggests a re-conceptualization of the approaches regarding social exclusion and destitution, by considering the cycle of familial life or "the political economy of the course of life". In her description of family dynamics, the author uses terms such as: longitudinal information, balance of needs and resources, vertical redistribution, under-privileged groups, the size and structure of the family, the

inequality of the chances of services to education and health, the phases of family cycle, the relationships within the family and other institutional spheres, age stratification, familial transitions, social changes or strategies of familial action.

From this enumeration it is hard to understand the complexity of the analysis of the factors which influence the social and temporal trajectory of the family, and, at the same time, the construction of the course of family life as a social institution. Moreover, the introduction of the distinction between “the stratification of the course of life” (referring to the means through which social state, the economical situation and the family influence the differentiation and inequality between individuals and groups) and “stratification upon the course of life” (which bases itself upon the hypothesis of increasing the cumulative advantages and disadvantages which take place along the years in a family or a social group) can formulate a new background of analysis for the research of social exclusion and destitution, as well as for the identification of the effects of a possible interaction of the factors which define the process of social stratification.

For the present discussion it is also important to note a number of changes that took place in the contemporary family. Referring to these changes, Ulrich Beck and Christoph Lau (2005), Jean Francois Dotier (2006), Daniel Caro, James Ted Donald and Douglas Willms (2009) talk about the phenomenon of "deinstitutionalization" of the family in industrial and postindustrial societies, a phenomenon that is reflected, on the one hand, by the increasing number of divorces, separations and free union and by the increasing number of single parent families, restored families or children born outside the family. On the other hand, a number of important changes were recorded in the structure of power within the family, the patriarchal authoritarian model being gradually replaced with the democratic model. This model has led to changing democratic social roles within the family: the role of women is no longer limited to that of mother, and the children's role won autonomy especially in the plan of their own responsibility.

On the same line of transformations, we can talk about a new division of domestic activities, about the transactions that occur regarding certain decisions, about strategies related to the career or education of their own children. Such changes must be correlated with the effects of the development of consumer society, the expansion of mass education, the progressive entry of women into the labor market, as well as the affirmation of new relationships between parents and children through the action of so-called "greenhouse generation".

Reporting the matters mentioned in the process of stratification, we should also highlight the problems concerning family structure, namely the number of children, their birth order, the interval between the births, the level

of investment in education in this field and so on. The existing theories attempt to explain the decrease of birth rates in modern societies, starting from an individualist point of view – the options of the parents. In the work of Gary Becker (1998), for example, it is believed that parents act as rational actors that satisfy their preferences in terms of costs, benefits and risks of their behavior. *Mutatis-mutandis*, the increased maintenance costs of a child in our society, low mortality, the increasing independence of women, their desire to assert themselves professionally, as well as the parents' option for quality in education and the life chances of their children led to declining births.

It is interesting to note that although Becker presented his theory as an "extension" of Thomas Malthus's analysis, also regarding the consideration of the family as a decision-making unit without any division within it, he denied the conclusion of Malthus, according to which economic prosperity determines population increases. In Becker's analysis, the effects of economic development are reflected rather in reduced birth rates, the main argument being that of the parents' options for the quality of education of their children approaching, a thesis close to the approaches in social theory. The latter argue that the decline in birthrates is the result of social development aiming issues such as expanding education, empowerment of young women's access to birth control facilities, family planning and the increasing decision-making power of the women within the family.

From the point of view that interests us here, Marian Vasile (2008) highlights the importance of studies that explore the advantages and disadvantages of families in which both spouses have income, the way in which families influence the transition on the labor market, how families are affected by their jobs, the way in which the work-family commitments differ along the life cycle, the risks faced by single parents or by reconstructed families from the perspective of achieving social and professional opportunities for children.

Tightly connected to the issues mentioned above is the dynamics of social training for certain socio-professional categories. From this point of view, the level of education that an individual can access is determined, along with the related components of his personality, by a number of social conditioning, in which the economic inequalities of the families have a fundamental importance. Researches in this field have revealed two main ideas (cf. Hatos, 2007; 2010):

- the existence of a significant correlation between the level of education and the status held by the individual or family in the social hierarchy
- the development of school systems did not exclude differences between the chances of the individuals coming from different social groups regarding the access to high school levels.

Thus, the inequalities regarding education involve both a reference to the existence of a number of social groups among which the question of inequality is asked, and to the school system itself, differentiated into a number of hierarchical levels to which this problem arises.

In both cases variables such as the following occur: the tuition fees, the concentration of schools in big cities, prejudices about different ethnic groups, the cultural level of the family, the family's predisposition to invest in education, the performances obtained by the individual at previous levels of schooling and so on.

### **The controversial problem of cumulative advantage**

The careful study of social reality highlights the many factors related rather to the chance of a life: the family of origin and its size, the education level, the geographic location, the income level, the type of wealth, ethnicity, professional prestige, political power, state health, the behavior of saving or wasting, the area of residence etc., which together constitute cumulative advantages or disadvantages.

Analyzing such phenomena, Thomas DiPrete and Eirich Gregory (2006, p 280), for example, came to systematize some operating conditions of the cumulative advantage, whose importance in terms of social differentiation are well known:

- The growth rate in the variable of a result of comparative advantage is a function of the current values of that result.
- The small advantages or disadvantages at an initial state tend to grow along various stages of the individual life.
- When the growth rates of a variable correlate with elements of social status, status inequalities show a rising trend.
- As a result of the effect involved by the cumulative advantage, the inequalities will increase at both levels of the individuals and the social groups.

The underlying idea deriving from the statements above is that "the cumulative advantage becomes part of the explanation for the increase of the inequality in the situation where the present levels of accumulation have a direct effect on relationships from the future levels of accumulation" (2006, p.272). In order to support his ideas, the authors use the findings of research conducted in different socio-economic areas, as well as those regarding the effects of cumulative advantage over the life cycle of the individual.

As an example, I will mention a few important issues encountered in the literature studied, aspects that serve to formulate hypotheses and explanatory theories of stratification according to the dynamics of contemporary society, as follows:



- The people best placed in the stratification system not only obtain considerable material benefits but gain additional prestige through the position they hold. Quite often, these people fail to convey the advantages they enjoy to their children, relatives or friends, who in turn can use them to get even more benefits. In other words, the advantageous position occupied by a person in the stratification system contains *in itself* the possibility of cumulative advantage.

- The children of political figures, of famous artists and athletes, of successful people in business and so on, although they may claim to have reached the position of their career based on their own efforts, "there is no doubt that they leave with the advantage of having their name recognized and with the relationship that other children with ordinary parents lack"(Goodman, 1999, p 176). So it is that the cumulative advantage not only serves to maintain the stratification system, but also to strengthen the existing differences in the allocation of society resources.

- The small differences in talent in the world of artists, doctors and athletes can produce disproportionate rewards in the competition functioning on the labor market and that of the awareness provided by the mass media. The level of popularity which returns to these categories of stimulates them to produce large quantities of goods and services and this system of unequal stimulation tends to amplify the differences of rewards regarding the very close individuals in terms of skills and talent.

- The effects of cumulative advantage can be found in the results obtained by an individual or another in the school journey. Be it skills, intelligence level, quality of teachers, the existing infrastructure in the school or educational institution reputation, academic performance occurs as a result of cumulative advantages specific to certain categories of people.

- The early career promotion in the conditions of professional competition is a premise of cumulative advantage, compared with those individuals whose promotion is slower or spanning over longer time periods. An important role in this process is investment in education, the effects obtained by those who invest in early education is cumulative advantage compared to those who invest later or those who invest limited resources.

It is important to note that the cumulative advantage can be seen as a form of cumulative disadvantage. The differences of social class, ethnic group, family status, educational level, possibilities of guarding one's health, as well as discriminations in gender, age and proximity are so many circumstances that contribute to aggregation of disadvantages, according to the principle "the poor get poorer" or "bad luck gives birth to another misfortune".

The conclusion to be drawn from this analysis is that the social differentiation mechanism involves considering both the differences regarding economic status, professional prestige, economic resources, education, quality

of life or lifestyle, as well as issues such as: group ideology, personal influence, the social accessibility of the position, the attitudes and personal values system or health conditions. It remains to be seen to what extent will sociological research and social assistance capture significant developments in this regard and the direction of these developments to a better design and implementation of social policies.

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