Processes of cumulative (dis)advantage in the study of inequalities. Theories, conceptual models, and analytical methods.

Mannheim University
September 30 and October 1, 2025.

Program

Day 1 (September 30, 2025)

From 13:00	Registration
13:15	**Welcome** Malgorzata Mikucka, Mannheim University and Franziska Schaaf, Research Manager Early Career Researchers / ENGAGE.EU, Mannheim University
13.30	Introductions by participants
14:00	**Opening Lecture: Cumulative Inequality Theory: Developmental and Demographic Processes** Kenneth F. Ferraro, Purdue University
15:00	Group work
15:45	Coffee break
16:05	**Lecture: Compensation as a Mechanism to Counterbalance Cumulative Disadvantage** Elina Kilpi-Jakonen, Turku University
17:05	Group work
17:50	Sharing the results of groups work
18:30	Closing of day 1
19:30	Social dinner

Day 2 (October 1, 2025)

09:00	**Lecture: Endogenous Selection Bias in the Study of Cumulative (Dis)Advantage** Fabian Kratz, Ludwig-Maximilians-Universität München
10:00	Group work
10:45	Coffee break
11:05	**Lecture: Diffusion of Cumulative Advantage? How Health and Wealth Trajectories Co-Evolve across the Life Course** Philipp M. Lersch, DIW Berlin and Humboldt University of Berlin
12:05	Group work
12:50	Sharing the results of groups work
13:30	Lunch
14:20	**Closing Lecture: Institutions and Cumulative Disadvantage across the Life Course: A Comparative Perspective** Anette Eva Fasang, Humboldt University of Berlin (zoom lecture)
15:20	Closing discussion
16.00	End of the workshop

Short abstracts

Cumulative Inequality Theory: Developmental and Demographic Processes

Kenneth F. Ferraro, Purdue University

The ideas of cumulative advantage and disadvantage (CAD) are attractive for sociological studies of inequality over the life course. This presentation traces the axiomatic development of cumulative inequality theory (CIT), which integrates elements of CAD, stress process theory, and the life course perspective. CIT is a middle-range theory to study the developmental and demographic processes that influence life course stratification. Distinctions between CAD and CIT are identified, along with three vantage points for studying the life course and theorizing accumulation processes.

Compensation as a Mechanism to Counterbalance Cumulative Disadvantage

Elina Kilpi-Jakonen, Turku University

Different ways in which resources accumulate has been a topic of growing interest in the intergenerational inequality literature in the past decades. At the same time, more emphasis has also been placed on differential impacts of policies — or more generally institutional contexts and living environments — on individuals or families with different socio-economic profiles. This lecture builds on these two literatures and presents how these processes of resource accumulation and differential impacts have been conceptualized as well as the associated empirical evidence. Particular emphasis is placed on the role of compensation as a mechanism that can in some cases counterbalance cumulative disadvantage and reduce the persistence of intergenerational inequality. Intraindividual (or intra-familial), interpersonal and institutional compensation are discussed as well as the concept of compensatory advantage. A fast-growing body of literature related to intergenerational inequality is concerned with gene–environment interplay (GxE), which can also be conceptualized within this same framework of accumulation and compensation. Related to this, the lecture presents new results on how daycare may (or may not) compensate for genetic disadvantages and influence intergenerational educational inequalities. The lecture also discusses the different terminology used across different studies and how this can challenge the accumulation of knowledge in this area of research. Finally, some of the empirical challenges related to the measurement of compensation are discussed.

Endogenous selection bias in the study of cumulative (dis)advantage

Fabian Kratz, Ludwig-Maximilians-Universität München

The basic form of cumulative (dis-)advantage theory predicts that inequality in certain outcomes increases with age, and scholars often estimate how the gap between (advantaged vs. disadvantaged) groups develops with age. Endogenous selection bias, arising from selective mortality, selective attrition, or selective item non-response, can affect the validity of such conclusions about the gap development over time.

As an empirical illustration, the lecture focuses on educational differences in subjective well-being (measured by life satisfaction) and on selective mortality as one important dimension of endogenous selection. The repeated cross-sectional data from the European Social Survey (ESS) and multi-cohort panel data from the German Socio-Economic Panel (SOEP) are used to discuss methods that rely on the weakest assumptions when endogenous selection bias is present. The results of this illustrative example show that a pattern of decreasing inequality in mean subjective well-being is accompanied by increasing inequality in intra-individual changes in subjective well-being. This pattern arises because disadvantaged groups, such as the less educated and individuals with lower subjective well-being, have a lower chance of remaining in the survey. Consequently, endogenous selection drives education-specific differences in subjective well-being towards a pattern of convergence, which – if the bias was not properly accounted for – could lead to an incorrect conclusion that the data are inconsistent with the basic form of cumulative disadvantage.

Diffusion of Cumulative Advantage? How Health and Wealth Trajectories Co-Evolve across the Life Course

Professor Philipp M. Lersch, DIW Berlin and Humboldt University of Berlin (Co-authored by Dr Anastasia Lam, Humboldt University)

Does cumulative advantage diffuse across domains? In other words, does the advantage in one domain spur further advantage in this domain and translate into more advantage in another domain? For instance, do already wealthy individuals accumulate more wealth and experience more advantageous health changes over time? Theory strongly suggests that a diffusion of advantages is unfolding in life courses; however, existing work on cumulative advantage and inequality across the life course is mainly focused on one outcome domain. We build on and extend cumulative inequality theory, focusing on the diffusion of cumulative advantage. We apply the theory using wealth and health as examples of two domains which are often considered prime examples of cumulative advantage principles. To test our expectations, we draw on high-quality data from the SHARE and use multivariate growth curve models to examine how wealth and health might co-evolve over the life course.

Institutions and Cumulative Disadvantage across the Life Course: A Comparative Perspective

Professor Anette Eva Fasang, Humboldt University of Berlin

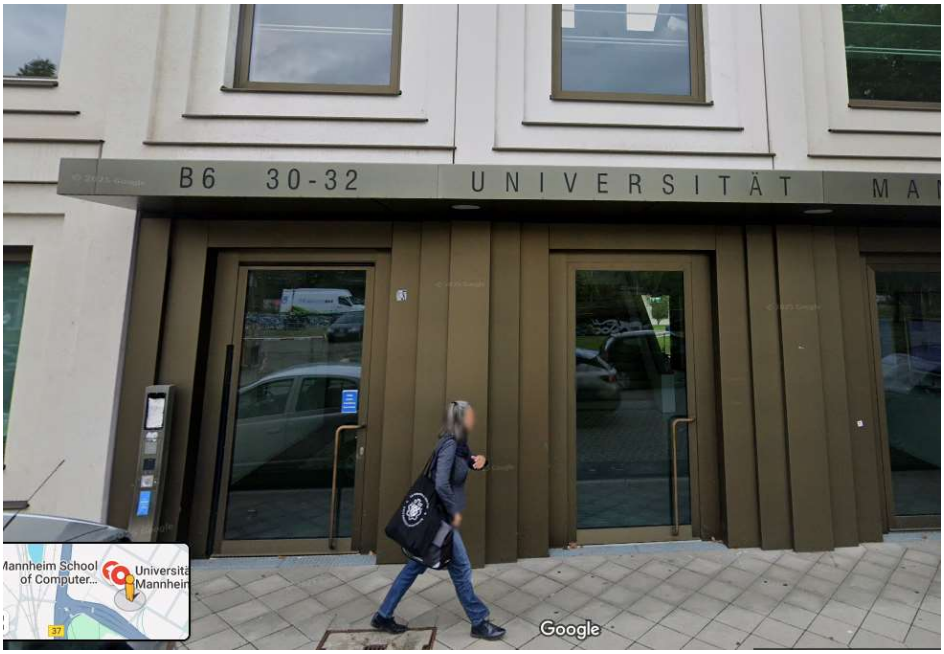
Cumulative Disadvantage (CAD) across the life course is immediately intuitive; however, CAD-type processes are often conceptually underspecified and empirically challenging to precisely identify in the stratification and life course literature. Common assumptions hold that specific macro-structural contexts, such as unregulated capitalist markets, exacerbate CAD. In contrast, specific social policies, including progressive taxation and public subsidies for education, are assumed to mitigate CAD across the life course and across generations. Systematic comparative research on CAD is challenging because multiple policies and macrostructural conditions at different points in the life course jointly impact CAD processes, which evolve over extended periods. This lecture discusses how macrostructural contexts and institutions can either reinforce or ameliorate cumulative disadvantage across the life course and across generations. First, different types of cumulative disadvantage and comparative strategies in the life course literature are reviewed. Second, theoretical propositions about which macro-structural contexts and institutions likely reinforce or ameliorate cumulative disadvantage at different time points in the life course are discussed. Special emphasis is placed on social policies and external shocks that could halt or reverse CAD-type processes. The arguments are illustrated with empirical examples focusing on young adulthood to mid-life in high and low-income countries.

Practical information:

Venue:

The workshop takes place in the premises of University of Mannheim.

Address: B6, 30-32 (E-F), room 008.1.



Accommodation

External participants stay at the InterCity Hotel Mannheim (Ecke L13, Schlossgartenstraße 1, 68161 Mannheim), conveniently located next to the train station. Single-occupancy rooms include breakfast. The venue is about a 20-minute walk from the hotel.

Social dinner on September 30, at 19.30

The social dinner takes place in Rheinterrassen am Fluss, (Rheinpromenade 15, 68163 Mannheim, about 10 minutes' walk from the hotel). The restaurant serves French and Palatinate cuisine prepared with regional ingredients, and includes vegetarian options.