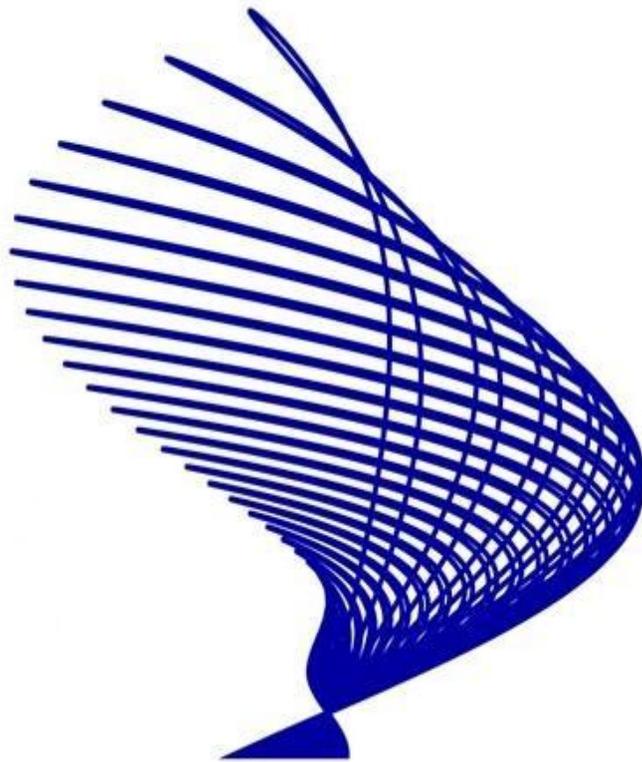


**NORFACE
Research Programme**

**Dynamics of Inequality Across the Life-
course: structures and processes**

Programme Text



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Introduction

The NORFACE (New Opportunities for Research Funding Agency Cooperation in Europe) network proposes a major research programme over the next four years on the topic of "Dynamics of Inequality Across the Life-course". This document describes the scope, objectives and content of the call. Rules for participation and procedures from proposal to implementation of the projects are described in the Call for Proposals and related call documents which can be found on the [NORFACE website](#).

Existing and rising inequalities pose fundamental challenges to European societies and economies. The increasing gulf between rich and poor, exacerbated by the recent financial and economic crises, is a key concern. The sources of inequalities in contemporary societies are complex and highly intertwined and they and their consequences can only be understood through comprehensive and innovative research activities. Given our relatively mature understanding of life course inequalities, it is time to focus on the dynamics of inequalities – across different life stages, across different dimensions of inequality, and across different dimensions of identity – and to identify opportunities to reduce them.

Consequently, this NORFACE programme is focused on understanding the dynamics of inequalities as they unfold over the life course, causal processes and drivers in relation to these inequalities, the impact of these inequalities on social cohesion, and the identification of opportunities for policy intervention to increase possibilities for social mobility and to reduce inequalities. The concern is to move beyond description and on to understanding underlying mechanisms and processes in order to identify these opportunities for intervention. This will be achieved through innovative, curiosity driven research that builds on extensive current knowledge on life course inequalities, is focused on gaps in our understanding of dynamics and underlying causal processes and drivers, with a view to working with users of the research in order to impact across Europe on policy development targeted at reducing inequalities.

The programme is structured around four themes that reflect transitions and trajectories at key stages of the life course:

- Early life influences and outcomes;
- Early adult transitions into tertiary education, vocational training and economic activity;
- Labour market and family trajectories and the growth of inequality; and
- Labour market participation in later life and retirement.

The novel contribution of this programme will come from the emphasis on: the interactions and interdependencies between these four key stages rather than treating them as independent; interdisciplinary approaches to understanding the relationships between different dimensions of inequality (education, employment, income, housing, living standards, health (including mental health) and wellbeing, etc.); the focus on different population groups (gender, social class, ethnicity, nationality and migration status, etc.) and the intersections between them; and the motivation to work in participation with research users in order to have a meaningful impact on policy development.

The description of the four themes gives a clear indication of areas that are considered to be priorities. However, it is expected that applicants will develop and add to these areas. In addition, applicants are encouraged to consider linkages across these four life stages, linkages across different dimensions of inequality, and the importance of subjective perceptions of inequalities, understandings of equality and justice, and how these are shaped by life stage and life course trajectories. So the programme encourages a focus on interdependencies between different life stages, between generations (and how this varies across life stages), between different areas of life and between subjective perceptions, decision making and objective outcomes.

The programme will advance globally excellent research which holds the promise of theoretical, methodological and empirical innovation. It also seeks to promote research based knowledge and insight which has societal, practical and policy relevance. This programme is open to social sciences (broadly defined to include economic, social and behavioural disciplines) and encourages inter-disciplinary and comparative analysis, with micro-macro-level analyses and interlinkages between thematic fields. While the focus is on the European experience, comparative research that looks outside of Europe to understand better European future developments is welcome. Applicants to the programme are encouraged to develop close relationships with research users, including those directly involved in regional, national and European policy development, in order to maximise opportunities to have meaningful impact on policy and practice targeted at minimising inequalities within the European context.

The programme hopes to engage but also to broaden, renew and rejuvenate the present academic community dedicated to life course inequalities research, and to motivate capacity building for research on relevant topics on a cross-national basis throughout the NORFACE countries. It is expected that applicants will make best use of existing data sources.

Conceptual framework

The life course framework

The NORFACE programme of work is focused on life course dynamics and how these influence and are influenced by inequalities throughout the life course. Within this focus on the life course is recognition of the importance of critical, or sensitive, periods that can have enduring effects (a focus which arises from much of the research on early life effects), and the role of trajectories with events at one point increasing the probability of particular events at other points. This requires an emphasis on how transitions are shaped by earlier circumstances, the connections between trajectories in different domains of the life course, and the accumulation of advantage and disadvantage across the life course.

Studies of life course effects point to the importance of dynamics within life courses, and the role of transitions, or turning points. These turning points, and especially the way that these turning points interact with personal, family and social resources, can be important in shifting individuals onto and off negative trajectories. Three principles of such dynamics are stressed. First is the influence of critical and sensitive periods. The proposition is that specific development periods are of particular importance for subsequent outcomes. The early childhood period is considered important in laying the foundations of several basic competencies that are crucial in shaping the life course. However, it is also important to recognise that similar and counteracting influences can occur later in life, for example in the transition from school to work, or the transition from work to retirement.

Second is the principle of cumulative contingency (or continuity) in the life course. An individual's life course should not be considered as an arbitrary chain of events. Rather, during development the life course becomes more and more predictable, and diversions from a particular life course trajectory (either in a positive or negative direction) become less and less natural, or easy to achieve. Cumulative continuity means that as experiences follow each other, people are increasingly directed into certain trajectories, and other options become less possible. Earlier school success, for example, opens the way to further career success, whereas earlier school dropout may lead to a fundamentally disadvantaged life course. Similar pathways into criminality have been studied. Some studies have also shown that with cumulative exposure to developmental risks or advantages, trajectories become more firmly established, increasingly diverge and inequalities widen.

Third is the identification of the importance of investment, the recognition that in part people are also the creators of their own life courses. People and families invest in human, social, and cultural capital, and as such attain resources that will be important in their later life course. However, such investment requires access to various pre-existing resources and supports. Lack of investment, either because of personal or societal factors, can therefore also lead to increases in social inequality.

The question of investment is also reflected in evidence that suggests that individuals differ in their susceptibility to environmental or societal influences. Some individuals are relatively stable and are less affected by such influences, whereas others seem to be more susceptible to them, both for better (affected by positive influences) or for worse (affected by negative influences). This is a form of person-environment interaction that can help us understand individual differences in the life course and can help identify points where we can influence the (inter)generational cycle that often lies behind the stability of a disadvantaged life course. Important here is to consider the individual and her/his social environment, and social and economic resources (including 'soft' dimensions such as social and cultural capital), which are all involved in the moderation of these effects and how access to such resources reflects life course inequalities and policy influences. The full range of policy arenas is relevant here (education, family (parental leave, family benefits, childcare services, etc.), employment, welfare, health, etc.).

In addition, there is also a need to consider connections across individuals, so called linked lives. So, for example, the direct effects on changes in inequalities among those of working age for their children, or the impacts of restructuring of labour markets and social care on the opportunities for those of working age to provide care for their older relatives, or the connections and transmission of resources both down and up generations. Such connections are relevant at both micro (for example, within a family) and a macro (within a population) levels.

The contemporary European context

In a consideration of life course dynamics it is important to account for contextual effects and how they relate to both time period and national/regional context and to use such an approach to consider how policy can shape social and economic institutions in order to reduce inequalities. This provides considerable scope for innovative and transformative social science research.

In relation to period, it is important to consider demographic, economic, political, social and cultural change. Of importance at the current time in Europe is the increasing destandardisation of the life course, strongly related to the current economic context, which has led to increasing risks of employment insecurity. This is reflected in delayed transitions into employment, increasing risk of job loss, prolonged unemployment, non-standard employment, earnings instability, more complex, varied and risky transitions into retirement, and pension reform. Alongside this are changes in the social, cultural and technological spheres of work, reflected in demands for workers to possess a broad set of skills, rather than a narrow trade, making them more productive and more easily adjustable to the changing conditions and demands of work. And coupled with this is an urgent need to understand how reforms to European welfare systems impact on the life course and the dynamics of inequalities across the life course.

Destandardisation is also reflected in greater heterogeneity in the formation and stability of partnerships, as well as the establishment and stability of independent households. More adverse, turbulent, prolonged and delayed partnership and household transitions seem to reflect social and economic inequalities. These changes have implications both for demands on time, with increasing proportions of the population becoming time poor, and the quality of leisure time, with the possibility that leisure time is enjoyed less by some segments of the population. In addition, Europe seems to be experiencing a growing number of young people without any attachment to the labour force, who are neither enrolled in education nor training, nor are in paid employment (so-called NEET). All of these changes may impact on the possibilities for active agency and full citizenship and lead to reductions of social cohesion, with economic consequences at individual and societal levels.

European societies are also facing unprecedented demographic changes, including rising life expectancy, high levels of migration and post-migration settlement, increased labour force participation of women, reduced family sizes and increased complexity of family forms. While some of these can also be captured under the concept of destandardisation, they raise particular challenges, most particularly in relation to the ageing of the population and implications for retirement, pensions and the provision of informal and formal health and social care. The rate of increase in the number of those post state pension age, that is those in retirement, will not be significantly reduced by the delays in retirement age that are occurring in most European countries. This means that the continuation and emergence of inequalities in later life is an increasing focus of attention. Related to this is the increasing diversity of family forms and the implications of this for both gender inequalities and connections across and within generations. And separately, the implications of the settlement of post-migration (ethnic and religious minority) populations and the social and economic inequalities faced by such groups, and how these develop over the life course and across generations.

In the context of these, and other, changes, this proposed NORFACE programme promotes an explicit cross-national comparative perspective. Different economic, demographic, cultural, welfare and institutional contexts, together with different policy responses, are likely to lead to different outcomes in relation to the dynamics of inequalities over the life course. The systematic investigation of country differences will enable a clearer understanding of the impact of institutional and policy solutions. Studies of policy interventions within countries will shed additional light on the potential of specific policies. Here it will also be important to pay attention to sub-national contexts. The ways in which place relates to variations in demography, labour markets, education and health care systems, and community and social cohesion, will have implications for regional differences in the dynamics of inequality within and between European countries. Throughout is the ambition for innovative approaches that will provide a sufficient understanding of policy impacts to allow for the translation of successful policies across national and regional boundaries.

Thematic focus of the programme

Theme 1: Early life influences and outcomes

There is a large body of evidence indicating that experiences during early life have an important influence on the development of inequalities throughout the life course. This research theme is concerned with developing our understanding of the relationship between social inequalities and biological, cognitive, psychological and social development in early life. The focus is on the social, economic and environmental influences on, and interactions with, these developmental processes, operating from the pre-natal period to school entry and throughout primary education. Within this the programme encourages a focus on both trajectories and the important transitions that occur during this period, such as into kindergarten and pre-school, school readiness, and into and out of primary education.

The existing focus on early life has included investigation of the prenatal period, which has been identified as important in shaping the intergenerational cycle of inequality. The proposed mechanisms include environmental exposures, nutrition and stress, resulting in those pregnant women who live in disadvantaged circumstances being less likely to provide an optimal intra-uterine environment for the development of their offspring. As well as focusing on the intra-uterine environment, research in this field has also examined perinatal risk factors (such as birth weight), birth complications and early markers of cognitive, physical and psychological development. These can be considered as intermediary outcomes reflecting the pathways of interest to outcomes later in childhood and adulthood.

Such pathways in early childhood are likely to involve interactions between individual, household and social factors. This is illustrated by Bronfenbrenner's biopsychosocial model, where it is proposed that the life course is influenced by many different levels, starting from the context immediately surrounding the individual (family, peer group, neighbourhood, local institutions (including education and care institutions)) and going up to nation-wide cultural, welfare and economic factors. In addition, these levels are considered to have complex, interacting, reciprocal effects, a process that acknowledges the agency of individuals, families, and peer and other social groups operating within cultural and structural constraints. In terms of personal characteristics, studies have identified the importance of the development of self-control, self-regulation, and resilience, examining how the development of such human capabilities influences positive and negative outcomes.

As indicated above, low birth weight is assumed to be one of the key indicators of an adverse prenatal environment. However, the processes by which low birth weight relates to consequent developmental disadvantages are not well understood. Low birth weight may indicate fundamental biological risks, or it may be a proxy for other, more relevant, risk factors operating throughout early childhood. Clear links seem to exist between low birth weight and various dimensions of inequality (such as socioeconomic position, parental educational levels, area deprivation). These dimensions relate to a range of possible biological, psychological and social pathways. Understanding these pathways and the interactions between them, rather than a sole focus on birthweight, may give clues to points of intervention in early life.

Crucial is to identify the upstream and downstream dimensions of inequality that lead to relevant effects. This means examining how inequalities shape parental health behaviours, nutritional deprivation, parental support, bonding and empathy, discipline strategies, and opportunities and support for cognitive development. And it also means examining the precise effects of these exposures on the infant or child, and the ways that these processes can be and are moderated. Identifying these factors, and developing interventions to address them, are important next steps to deal with the early roots of inequality.

In addition to pre- or peri-natal effects, early childhood has been identified as the phase where the foundations of later cognitive, personal, and social development are laid. The early years seem to be crucial for sensory-motor development, for the development of the basic functions of language and cognition, and for the emergence of cognitive and behavioural control systems. The developing brain seems to maximally responsive to positive stimuli during these early periods, but the downside is that less creative or deprived environments during this phase of the life course are thought to also have irreversible negative effects. More specifically, intelligence and character (temperament, personality) seem to be early precursors of inequality throughout the life course. Temperament and personality play an important role in the main areas of functioning, including academic achievement, relationship formation, occupational choice, career stability and success, and risk taking. They also seem to contribute to more evaluative experiences, such as wellbeing, which might also, of themselves, be an important pathway through which later life outcomes are generated.

Similar key indicators of adverse environments can also be found in the peer relations (both friendships and groups) later in childhood and adolescence. Links have been demonstrated between peer relations and later inequalities related to school career, health behaviour, and mental health. Reciprocal and interacting processes between all levels of Bronfenbrenner's model are assumed to be responsible for these links.

Identifying opportunities for intervention in early childhood will be crucial to reducing inequality and maximising social mobility. Relevant here are policies shaping the provision of childcare, early years education (including the development of language and social skills), developing parenting skills, maternal employment, and how the opportunities provided by such policies relate to family background. Early childhood education and care can play a role in laying a solid foundation for later years. This may operate through an influence on personal factors, such as physical and mental wellbeing, social and emotional competence, and literacy. All of these are important elements of school readiness and future success in school. Existing research has shown that children's preparation for school not only depends on home environment, but also (and perhaps more importantly) on broader environmental factors, such as those associated with the family's socioeconomic position and consequent access to necessary resources. There is also growing evidence that limitations in the home and broader context during early childhood can be countered by adequate early childhood education and care. Also important is that adequate early childhood education and care can play a role in supporting parents, especially women, to combine childcare and employment, so reducing inequalities for both parents and children. Identifying and developing the evidence base for such interventions would provide great potential for policy development.

Theme 2: Early adult transitions into tertiary education, vocational training and economic activity

There is an extensive body of research on youth transitions. Much of the focus has been on variations in the experience of labour market entry and of demographic transitions, such as setting up a home and establishing intimate relationships. Evidence shows that the success of such transitions relates to early life influences, but also has implications for future outcomes, including longer term employment, family formation, mental and physical health, social participation and involvement in civic activities.

So, existing research has given us a good understanding of the patterning of the labour market circumstances of young people and their school-to-work transitions, as well as the main factors influencing these phenomena both at individual and macro levels. The major focus of this work has been on the role of educational qualifications and education systems, including school effects, in shaping school-to-work transitions, with little attention paid to other determinants of job entry and early employment careers. These

include broader, transferable, skills, social contacts, cultural capital, personality traits and employers' (discriminatory) behaviour. Furthermore, a switch from a paradigm that views school-to-work transition as a straight-line unidirectional process towards one that incorporates analyses of intervening, parallel and recursive events, transitions and loops within education, training systems and labour markets is still to be achieved.

Education dropout has been a particular focus of research, which has explored predictors of dropout and what can be done to prevent dropout and to encourage young people to stay in, or return to, education. One group of young adults that has been identified as particularly vulnerable are those not in education, employment or training (NEET). Sharing a number of characteristics with young unemployed people, NEETs are more vulnerable, more persistently disengaged from the labour market, and much less responsive to policy interventions. Such young adults run the risk of long-term socioeconomic marginalisation, criminal behaviour, unwanted pregnancies, and mental and physical health problems. Their increased economic dependence on parents and lack of a long-term perspective can further trigger a cycle of intergenerational poverty and growing social inequalities. However, we have only limited evidence on the long and short term drivers into and consequences of NEET status and, consequently, possible strategies for intervention. This means that necessary policy and institutional responses have only a limited evidence basis from which to draw.

At the other end of the education distribution, the continuing expansion of education systems within and beyond Europe, and the harmonisation of this within Europe through the Bologna process, means that there is an increasing interest in analysing tertiary education pathways. The concern is to identify characteristics leading to successful graduation versus those that are related to study non-completion, and how the distribution of these characteristics reflects current inequalities and inequalities operating earlier in the life course. Important is that although tertiary education dropout is often perceived as a failure, reasons for dropping out are multifaceted, as are the subsequent educational and occupational trajectories. An important question here is whether and how the lack of formal qualifications can be compensated for by the acquisition of skills and resources in tertiary education, as well as through less conventional and non-standard employment pathways, and how the acquisition of these skills relates to dimensions of inequality.

Demographic research has also generated important evidence on the patterning of young adults' household, partnership and family formation and how this is changing in the context of destandardised lifestyles and diminishing economic resources for many. Current evidence indicates that youth unemployment and labour market precariousness also impact on young adults' ability and willingness to make stable commitments to adult family roles. A reason for the positive relation between secure employment and fertility can probably be seen in the increasing importance, particularly for women, of a stable tie with employment to guarantee economic stability, as well as social and psychological wellbeing.

Circumstances in early adulthood relating to these transitions impact beyond the individual concerned, because individuals are located within family and household contexts. This means that other members of the family and household are affected by outcomes for the individual concerned, with implications for the transmission of inequalities within and across generations. And there might be an accumulation of risk within the household, with more than one member facing such inequalities in the labour market. Alternatively, growth in individual risks related to unemployment, precarious and interrupted work careers and economic insecurity might be cushioned through the risk compensation capacity of families: for example, in a household with a stable income provider the precarious employment of the partner might not lead to major problems for the household. This emphasises the need to look beyond the individual and to examine family and social connections.

So, a number of outstanding questions remain. How well do the qualifications offered and skills instilled within education system respond to the changing demands of working life? Which factors at the individual level are protective against risk of precariousness in education and employment? How do these factors and their relationship with outcomes interact with country-specific institutional characteristics and changing labour market demands? How are these risks differentially distributed across population groups (gender, ethnicity, etc.)? What are the consequences of unemployment, NEET and atypical employment for key demographic transitions? And how do these inequalities reciprocally interact with other outcomes such as health (including mental health), wellbeing and social participation?

Theme 3: Labour market and family trajectories and the growth of inequality

A common feature of labour markets in many countries is that income inequality grows with time spent in the labour market, so cross-sectional inequalities are relatively low early on in employment, but are relative large when earnings are at their peak. This might be a consequence of the differential accumulation of skills (human capital, but including 'soft' skills) over the life cycle, where occupations that involve significant skills development are associated with substantial earnings growth over the career, whereas other occupations are associated with flatter earnings trajectories. However, this observed heterogeneity in earnings growth might also be explained by differences in the types of employment contract between different types of occupations and by differences in the types of social networks that are formed in the labour market.

Also, while earnings trajectories have an on average growth over time, it is important to also consider the processes that give rise to drops in earnings for some segments of the workforce, a factor that also generates income inequality. In some cases, such as layoffs from firms in contracting industries, they are a direct consequence of labour-market shocks. In these cases skills become less valued, or obsolete, and the acquisition of new skills is needed to get back onto a reasonable earnings trajectory. In other cases, such as parental leave, there is often a plan for an interruption in careers for child care. However, such interruptions can have both short and long-term consequences for subsequent earnings and may make an important contribution to the growth of gender inequalities in earnings over time. In addition to the impact of parental leave, and caring for children more generally, partnership dissolution (divorce and separation), new partnership formation and the increasing variety of family forms, have important implications for inequalities, and impact differentially across socioeconomic groups and men and women.

It is also important to consider the reciprocal relationship between work and physical and mental health. Existing evidence clearly demonstrates that socioeconomic inequalities and poorer work conditions lead to a greater risk of poor health. And also that poor health leads to an increased risk of labour market exit and increases vulnerability to downward social mobility. More recent research suggests that the relationship between poor health and labour market exit is moderated by socioeconomic position, with those in a higher position less likely to leave work, and that there is a strong relationship between socioeconomic position and labour market re-entry. The implications of this are that labour market inequalities will widen as a consequence of socioeconomic differences in health and that the reciprocal relationship between health and work requires greater investigation in order to identify strategies for reducing this relationship.

Within this it is important to consider the implications of an increasing destandardisation of employment relationships and the roles of employers and trades unions, operating within national policy contexts, in shaping this. In times of globalisation, employers transfer their market risks and uncertainties to employees by more often offering them temporary labour contracts or other forms of flexible employment. Flexibility in employment is especially concentrated among young people entering their very first labour market position at a time when they usually lack work experience, seniority and networks, which makes it hard for them to obtain secure and stable jobs. The growth of job insecurity as a product of a volatile economy has

traditionally concerned those in less skilled work, but with the growth of global volatility in financial and labour markets this insecurity seems to increasingly affect those in high-skill and high-paying jobs and occupations. There is relatively little research knowledge of the dependencies between atypical forms of employment and the capabilities, skills and qualifications obtained in education, and how this relates to ongoing learning, on the job training and continued education. Furthermore, research exploring career and life course consequences of accepting non-standard entry positions compared to a more favourable alternative of entering standard jobs, on the one hand, and to staying unemployed, on the other hand, is needed. Also relevant is research on family trajectories, fertility, partnership formation and dissolution, and the differential impact of these on economic position, employment, and mental and physical health across socioeconomic and gender groups. Finally, studies should address the question of whether these effects are contingent on economic and structural conditions, as well as countries' institutional settings, which calls for a comparative approach. With regard to the recent economic crisis, the impact of variations in policy responses across countries on labour market insecurities and their differential distribution in the population, is worth exploring.

Theme 4: Labour market participation in later life and retirement

Along with the ageing of European populations we are also seeing increasing complexities in labour market participation in later life and in the retirement process. The complexity of retirement transitions and later life labour market participation is reflected in great heterogeneity in age of retirement within particular cohorts in particular countries, as well as marked differences across cohorts and across countries. In part this relates to variations in pensions systems across periods and nations, and variations in levels of pension at an individual level, related to family, socioeconomic and life course factors. Also important to this increasing complexity are destandardisation of the life course and policies focused on extending working lives. However, while these processes are increasingly being studied, the relationship between retirement and inequality, how retirement experiences relate to life course inequalities and how retirement processes might amplify or mitigate inequalities, has not been the subject of significant levels of research.

In relation to this diversity, there are several core issues that need to be considered in relation to retirement and later life labour market participation. The current and forthcoming generations of retirees will be more numerous and a larger proportion of the population, and also likely to be different in many aspects to previous generations. Increasing life expectancies suggest improvements in health compared with previous generations, implying greater potential for continuing paid employment and engaging in other civic and community activities. However, other changes suggest that improvements in health might not be so straightforward, with factors such as increasing levels of obesity impacting negatively on the health of more recent cohorts. There is also evidence suggesting that socioeconomic inequalities in health might be worsening as a result of increasing levels of poor health among those in the poorer segments of the population. Different cohorts have also faced different levels of risk and security over their working lives, resulting in variations in inequality within and between cohorts. So periods of recession and growth, and experiences of job insecurity will have varied. The presence and position of women in the labour market has also varied greatly across cohorts. And there are marked variations in pension systems and pension rights across cohorts and across nations. In addition, there are also marked variations in family forms and marriage across cohorts and nations. For example, the prevalence of divorce increases in younger cohorts along with differences in the implications of divorce both for economic position, with increasing female labour market participation, and for social and family networks, as the negative meanings of divorce reduce and family structures become more complex.

Importantly, retirement and later life labour market transition are areas with very active policy development and implementation. This provides an opportunity for the development of policy options to reduce

inequalities at this life stage. However, current policy work, and the research that underpins it, largely neglects implications for inequalities. This might reflect recognition of the accumulation of inequalities from earlier stages of the life course, a consequent focus on addressing inequality at younger ages and the expectation that there are fewer opportunities to make a difference in later life. For individuals, this might then result in a restricted set of strategies to deal with difficult socioeconomic circumstances in later life, since options to return to work, to undertake skills development, or to increase or decrease working hours may be limited.

To redress this policy stasis, research focused on the impact of later life events related to work and retirement on inequalities, and how policy might be developed to optimise these transitions in order to minimise economic, health and wellbeing inequalities, would be valuable. In particular, it would be valuable to have a focus on later life employment (including conditions of employment), retirement processes (including voluntary and involuntary retirement, and the impact of health on retirement choices), and how these relate to dimensions of existing inequality and potentially amplify inequality. Within this there is a need to examine the extent to which life-course inequalities might actually have a diminished direct influence in later life, with effects mediated by later life transitions (retirement, widow(er)hood, serious illness) that are, or whose consequences are, amenable to policy interventions. The welfare, health and social care systems might mitigate some of the negative effects of widow(er)hood and health dependency on economic position and wellbeing, so an examination of these influences on different socioeconomic groups, men and women, and post-migration populations, across nations would be particularly valuable.

Research materials, methods and data sources

It is expected that research projects in this NORFACE DIAL programme will be ambitious and innovative and make novel contributions to conceptual, theoretical and empirical understanding. The ambition of this programme will require interdisciplinary and mixed method (quantitative and qualitative, cross-sectional and longitudinal) work, connecting different levels of influence (individual to social), different stages of the life course, different population groups, different dimensions of inequality (class, gender, ethnicity, etc.), and a range of outcomes. A particular strength of the programme will be the international comparative focus, with countries selected for inclusion in research projects because of the opportunity to exploit specified national variations in economic, demographic, cultural and policy context in order to achieve a more critical analysis of causal processes and drivers, and, consequently, opportunities for policy development. This will allow the research programme to address a broad European policy and science agenda in order to provide clear 'European added value'. Research projects that extend comparisons beyond NORFACE countries are welcome so long as they draw lessons for Europe.

The programme encourages innovative research which cuts across several of the four themes outlined in the programme, examining the dynamic relationships and interdependencies between: different stages of the life course, different drivers of inequality and different dimensions of inequality. The complexity of the research area calls for multiple theoretical perspectives, invites interdisciplinary approaches, and the use of different sources of evidence.

Applicants are encouraged to take full advantage of existing data sources, exploiting the strong data infrastructure for social, behavioural and economic research that exists across several European countries. Given the quality and depth of these data resources, a major aim of this programme is to ensure that they are fully exploited to address the programme themes and that capacity is built within the academic community to make best use of them. An aim of this programme is to deliver high quality research through the creative use of existing data resources.

There are a range of existing data sources that would be of value to the research. These include existing international comparative datasets, such as the European Social Survey (ESS), European Union Labour Force Survey (EULFS), European Value Survey (EVS), Luxembourg Income Study (LIS), the Programme for International Student Assessment (PISA), the International Adult Literacy Survey (IALS), the Adult Literacy and Lifeskills Survey (ALL), and the Programme for the International Assessment of Adult Competencies (PIAAC), as well as longitudinal studies, such as the Survey of Health, Ageing and Retirement in Europe (SHARE), the British Household Panel and Understanding Society Surveys, the German Socio-Economic Panel, the Gender and Generations Programme (GGP), EU Statistics on Income and Living Conditions (EU-SILC). Data sources provided by Eurostat, the UN, the OECD, the World Bank, the IMF etc, are also relevant for the programme. Harmonisation of these European data sources available to study inequalities, and linking survey data with administrative data could have important added value.

The programme may support the collection of new data, be that quantitative or qualitative, only where existing data does not exist to address key questions.

Integration and capacity building

This NORFACE programme has transnational and interdisciplinary collaboration at its core. It also has the ambition to build strong relationships with users of the research and to have a direct impact on policy development.

Capacity building within and across the NORFACE countries is central to this programme. The focus is on building research capacity and collaboration through:

1. Research training targeted at early and mid-career researchers, including doctoral students, taking full advantage of existing training opportunities;
2. Research training involving interdisciplinary, mixed methods and international working;
3. Research training involving working with research users in the design, implementation, dissemination and broader use of the research;
4. Building international networks and taking advantage of existing networks to increase the potential for effective international comparative research;
5. Developing networks with and between research users across the NORFACE countries.

Applicants should pay due regard to the focus of and research commissioned under the NORFACE programme *Welfare States Futures* and by the Joint Programming Initiative (JPI) "More Years, Better Lives – The Potential and Challenges of Demographic Change". Applicants are advised to explore the possibilities of synergies with these programmes and to ensure that this involves added value rather than duplication. Applications which display significant overlap with research commissioned in other international networks or previous NORFACE programmes risk not being included in the evaluation process.

Stakeholders

Key stakeholders for this NORFACE programme include: the academic research community; governmental agencies at local, regional, national and trans-national levels; parliamentary assemblies; public, private and voluntary organisations engaged with education, employment and other dimensions of inequality; advocacy organisations for marginalised groups; employers; and the media. Several stakeholder activities and case studies can be built into the projects funded within the programme. The incorporation of stakeholders into proposed research project teams, so that relevant users and policy experts are included, is encouraged.

Expected impact

The proposed transnational NORFACE programme will provide new and novel analyses on the dynamics of inequalities over the life course. The programme will contribute to understanding the dynamics of inequalities as they unfold over the life course, causal processes and drivers in relation to these inequalities, the impact of these inequalities on social cohesion, and the identification of opportunities for policy intervention to increase opportunities for social mobility and to reduce inequalities. The programme will examine how crucial points in the life course of individuals and crucial demographic events can precipitate or mitigate the risk of poverty and social exclusion. It will disentangle the impact of past events and current circumstances on outcomes. In these ways the NORFACE programme will offer more possibilities for alleviating inequalities and societal problems arising from inequalities, including their impact on social cohesion.

The NORFACE programme aims to advance internationally leading comparative research on inequalities that builds synergistically on a pan-European basis. The research will be theoretically and methodologically

excellent in disciplinary and inter-disciplinary terms. The programme will motivate and support excellence and capacity building for cross-national research on inequalities throughout the NORFACE countries. The programme will develop understanding and promote research-based knowledge and insight for issues of societal, practical and policy relevance, with strong theoretical foundations, developed jointly with relevant users and experts.