

Remembering Chris Whelan (1947-2022)

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Christopher T. Whelan, Chris to his colleagues and friends, made major contributions to the study of social stratification, the development of sociology in Ireland, and to building European social science research collaboration.

Raised on Pearse Street in Dublin's south inner city, Chris first studied psychology before completing a Masters in Sociology at the London School of Economics in 1974. Having joined the Economic and Social Research Institute in 1978 he obtained his doctorate from the University of London in 1984. After three productive decades in the ESRI, he moved to the School of Sociology in University College Dublin as Professor of Sociology in 2009, serving as head of that department for several years. From 2012 he was Professor of Sociology at Queen's University Belfast until retiring in 2015. He retained close links with UCD's Geary Institute as well as the ESRI and continued publishing up to his death in September 2022. He was elected to the Royal Irish Academy in 2006.

Chris's research covered a wide span of topics with a central focus on social stratification, social mobility, the causes and consequences of poverty and inequality, and societal change in Ireland and Europe. His early research reflected his grounding in social psychology and dealt with topics including the psychological impact of unemployment and other aspects of psychological distress, the relationship between employment conditions and worker satisfaction, and values

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and social change in Ireland. In the early 1980s, as Chris was starting his career in the ESRI, major new strands of American and European sociological research attracted his interest and set him on a course which was to define the bulk of his career and shape his contribution to the social sciences. The initial spark came from the sociology of education and related to the then hot topic of equality of educational opportunity. The rapid expansion of educational provision and take-up in Ireland from the mid-1960s had by the 1980s prompted a belief among some commentators that its meritocratic aims were a good way along the road to being fulfilled: student ability rather than family resources were emerging from research as the main driver of educational success and seemed to mark a step away from traditions of inherited privilege. In 1984, however, Chris and his ESRI colleague Brendan Whelan provided Ireland's first thoroughly sociological contribution to this subject (Whelan and Whelan, 1984a) and placed it in the context of a broader study of social mobility more generally (Whelan and Whelan, 1984b). These studies, as well as kick-starting Irish research on social mobility, threw cold water on meritocratic optimism, showing that what was measured as student ability was itself conditioned by the students' social class background and served to reproduce class differences in and through the education system.

This was Chris's first venture into the wider preoccupation with social stratification and social mobility which was then sweeping through sociology in the US and Europe and captured his attention for the following decade. Its core questions were how 'open' the class structures of modern industrial democracies had become and how that openness could be measured and explained. By 1985, in a paper published in the *British Journal of Sociology*, he and Richard Breen had presented the first comparative analysis on these questions involving Ireland, based on samples drawn from Dublin on the one side and England and Wales on the other. This study deployed the theoretical distinction between absolute and relative social mobility that was fundamental to the field, alongside the parallel distinction between the economic and the political as causal channels. It also sought to push out the methodological boundaries of the subject by building loglinear models that could accommodate late-industrialising Ireland and early-industrialising England and Wales within the same framework. Over the following decade, he and a small number of colleagues in the ESRI (consisting centrally, alongside Chris, of Richard Breen, Damian Hannan, Philip O'Connell and David Rottman) formed an informal but cohesive academic collective that had little parallel in Ireland or elsewhere. Working in varying combinations with each other and occasional outsiders, they produced a remarkable flow of output that was grounded in questions of social class and social mobility, particularly in regard to relative social mobility, and examined the role of the State as a potential engine of social equality. A book co-authored by four members of the group in 1990, *Understanding Contemporary Ireland*, brought the fruits of much of the work of these years together (its subtitle, 'State, Class and

Development in the Republic of Ireland' gives a good indication of its main topics – Breen, Hannan, Rottman and Whelan, 1990).

This work also projected the Irish case into European research on industrial societies and was enhanced in that regard by a link with sociology in Nuffield College in Oxford that had emerged and developed in the latter half of the 1980s. Chris was a key figure on the ESRI side in cultivating that link. Along with John Goldthorpe from Nuffield, he co-organised a conference on the experience of industrialisation in Ireland which took place under the auspices of the Royal Irish Academy and the British Academy in Oxford in December 1990. This multi-disciplinary event drew contributions from sociology, economics, political science and demography to provide a wide review of the Irish case in the light of international trends and of its significance for international theories of industrial societies (the proceedings are in Goldthorpe and Whelan, 1992).

The studies in that volume had focused entirely on the Republic of Ireland but, as the 1990s progressed and the peace process emerged in Northern Ireland, the paucity of social scientific contributions to cross-border understanding on the island of Ireland had become glaring. Here again the ESRI-Nuffield nexus stepped forward, once again with Chris as the key figure on the ESRI side. He worked with Anthony Heath in Nuffield College and with Richard Breen, who by then was in the European University Institute in Florence, to set up a re-run of the 1990 Oxford conference in 1996. This time the aim was to provide the first-ever systematic study of the social, economic and political development of the two Irelands since partition, drawing again on a wide range of disciplinary contributions (those proceedings are in Heath, Breen and Whelan, 1999).

In the meantime, Chris's work on social stratification had reached a certain culmination with a state-of-the-art study of social class and mobility in Ireland which he co-authored with Richard Breen (Breen and Whelan, 1996; for lead-in studies, see Breen and Whelan, 1994a; 1994b; 1995). By then, his interests had broadened to include questions of resource distribution defined in applied social policy terms, especially in regard to income distribution, poverty and economic equality. The foundations for this field of work were more normative and a-theoretical than many sociologists were prepared to accept. But Chris saw it as an extension of social stratification research and thus as capable of being tied in with the core sociological focus on social class. His insistence that those experiencing poverty be seen as the most disadvantaged stratum within a socially structured system of inequality, rather than some quite distinctive group cut off from the mainstream, came to be seen as the trademark idea in what Goldthorpe later approvingly referred to as the 'ESRI approach' to the study of poverty (Goldthorpe, 2010:735).

Chris had become centrally involved in cross-disciplinary research on poverty and economic inequality at the ESRI from the late 1980s, initially exploiting the large-scale household survey carried out by the Institute in 1987. As well as

illuminating the extent and nature of poverty and social exclusion in Ireland, this research developed an approach to capturing poverty empirically that would prove to be hugely influential in the design and monitoring of policy both in Ireland and the EU. It combined measures of household disposable income, on which poverty measurement in rich countries often relies, with direct non-monetary indicators of material deprivation of the sort developed by Peter Townsend in Great Britain (Callan, Nolan and Whelan, 1993; Nolan and Whelan, 1996). This approach was taken on board by the Irish government in the headline targets it set in the innovative national anti-poverty strategies adopted in the 1990s (Layte, Nolan and Whelan, 2000). It has continued to play a key role in official monitoring of national poverty and exclusion since.

This approach to conceptualising and measuring poverty in Ireland allowed the driving forces underlying it to be illuminated, bringing long-term structural factors and the role of dynamics to the fore (Nolan and Whelan, 2000; Whelan, Nolan and Maître, 2006; Whelan and Maître 2007; 2008a). A paper looking back on 30 years of ESRI poverty research which Chris co-authored in 2017 (Watson *et al.*, 2017) showed that to understand the complexities of social class influences on deprivation, a more complex set of indicators of that outcome was needed than was provided by a focus on current disposable income alone. Social class differentiation was seen to be significantly sharper when one focuses on joint exposure to income poverty and deprivation and when a longitudinal rather than cross-sectional perspective is employed.

The conceptual and empirical groundwork that Chris and his colleagues had laid in the ESRI in the early 1990s using Irish data put them in pole position in the analysis of poverty and inequality in Europe, as high-quality harmonised household survey data became available from Eurostat from the mid-1990s via the European Community Household Panel (ECHP), and then from 2005 via EU Statistics on Income and Living Conditions (EU-SILC). Their approach proved highly transferable to the EU level, and they produced a flood of papers showing how this was so. Examples include Whelan, Layte, Maître and Nolan (2000); Layte, Whelan and Maître (2001); Layte, Maître, Nolan and Whelan (2001); Whelan, Layte, Maître and Nolan (2001); and Whelan, Layte and Maître (2002; 2003; 2004). The distinctive focus in this European research was on the interplay between economic resources and outcomes in terms of both material deprivation and subjective economic and psychological stress, with a strong emphasis on both shorter-term dynamics and patterns over the life-cycle. The role of the State – distinguishing between various welfare regimes and incorporating other relevant aspects of the national institutional setting – was a key preoccupation, as were the implications of the identified drivers of country variation in outcomes for both national and EU-level policy. A defining feature of this work was its interdisciplinary nature, entailing the combination of sociological and economic concepts, insights and analytical techniques, an approach that Chris greatly valued and encouraged. This

research has had a lasting impact on how trends in poverty and exclusion and performance in addressing them are monitored at national and European level, and on how the underlying causal processes are investigated and understood.

Once again this comparative research saw poverty firmly in the broader context of stratification and inequality, as exemplified for example by the title of Chris's 2008 paper with Bertrand Maître in the *British Journal of Sociology*, 'Social Class Variation in Risk: A Comparative Analysis of the Dynamics of Economic Vulnerability' (Whelan and Maître, 2008b). This was again seen in analysis of the impact of the Great Recession from 2008, emphasising the way this was structured in social class terms, both comparatively and in the case of Ireland (Whelan, Nolan and Maître, 2017a; 2017b; 2018). Throughout his career Chris was also interested in the latest methodological innovations and applying them in his work (for example in Whelan and Maître, 2005; Whelan, Pisati *et al.*, 2010; Whelan, Nolan and Maître, 2014). His collaborative research continued past formal retirement, and continued to go well beyond poverty and disadvantage to encompass intergenerational transmission of advantage and disadvantage, well-being and its components, psychological stress, and life-cycle and family dynamics. Chris published about 200 journal articles, monographs, books and book chapters over the course of his career. A substantial proportion involved comparative analysis, not least to allow for a better understanding of Ireland's distinctive socio-economic structures and their implications for the lives and life-chances of ordinary people.

Alongside his large contribution to the understanding of social processes and to the development of sociology, Chris invested a great deal of time and energy into international research networks and building social science research collaboration in Europe. Early in his career it was not obvious how the informal highly productive research team in the ESRI of which he was a part, as referred to earlier, emerged or held together. In retrospect, though, it seems likely that his presence was a key influence for, throughout his career, everywhere he went collaboration went with him: again and again he was found at the centre of efforts to bring scholars together on shared endeavours. His international contributions in that arena included chairing the Governing Council of the EU Economic Change, Quality of Life and Social Cohesion Network of Excellence (co-ordinated by Robert Erikson) and as Coordinator of the EU-funded CHANGEQUAL Network 2003-2004. He was instrumental in the ESRI being among the founding members of the European Consortium for Sociological Research (ECSR) in 1991, was a member of the editorial board for its journal, the *European Sociological Review*, and served as Chair of the ECSR Board from 2009-2012. He also served as Chair of the Standing Committee for the Social Sciences of the European Science Foundation from 2002-2005. His effectiveness in these roles was widely acknowledged and did much to raise the profile of Irish sociology and build the infrastructure of sociological research across Europe.

The warmth of Chris's personality was reflected in the extent of these collaborations and contributed in no small measure to their success. He will be remembered in particular for his encouragement of younger scholars, offering invaluable guidance and support to those in the early stages of their academic careers, in Ireland and abroad, who found in Chris a mentor who was not only highly knowledgeable but also genuinely excited by their success. Alongside the lasting impact of his work, the memories of his colleagues, collaborators and friends, as well as the family that meant so much to him, are fitting testimony to a scholar who took his work seriously but himself much less so.

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