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Inter-generational micro-class mobility during and after socialism: The power, education, autonomy, capital, and horizontal (PEACH) model in Hungary

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ABSTRACT

We propose a theoretical model of how occupational mobility operates differently under socialism than under market regimes. Our model specifies four vertical dimensions of occupational resources—power, education, autonomy, and capital—plus a horizontal dimension consisting of linkages among occupations in the same economic branch. Given the nature of state socialist political-economic institutions, we expect power to exhibit much stronger effects in the socialist mobility regime, while autonomy and capital should play greater stratifying roles after the market transition. Education should have stable effects, and horizontal linkages should diminish in strength with market reforms. We estimate our model's parameters using data from surveys conducted in Hungary during and after the socialist period. We adopt a micro-class approach, though we test it against approaches that use more aggregated class categories. Our model provides a superior fit to other mobility models, and our results confirm our hypotheses about the distinctive features of the state socialist mobility regime. Mobility researchers often look for common patterns characterizing mobility in all industrialized societies. Our findings suggest that national institutions can produce fundamentally distinct patterns of mobility.

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1. Introduction

The collapse of state socialist societies and their rapid movement toward market-based economic systems was the most dramatic example of macro-level institutional change in the second half of the 20th Century. Inspired by the possibility that market transition could reveal the processes through which economic and social institutions shape social inequality, sociologists have explored the impact of sweeping market reforms on different aspects of social stratification (see [Keister and Borelli, 2012](#) for a recent review). Many studies address intra-generational processes of inequality, such as the relative effects of political, human, and social capital, gender, and structural change on earnings, employment, and other labor market outcomes ([Bian and Logan, 1996](#); [Domański, 2005](#); [Gerber and Mayorova, 2010](#); [Gerber, 2012, 2006, 2002, 2000a](#); [Nee and Oppen, 2010](#); [Nee, 1996, 1991, 1989](#); [Róna-Tas, 1994](#); [Trapido, 2007](#); [Verhoeven et al., 2005](#); [Walder, 2003, 2002](#); [Wu and Xie, 2003](#); [Wu, 2006](#); [Xie and Hannum, 1996](#); [Zhao and Zhou, 2002](#); [Zhou et al., 1997](#)).

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Here we push the market transition literature in a relatively new direction by focusing on how the institutional retreat from state socialism re-shaped the mechanisms governing inter-generational occupational mobility. Although some work has examined post-socialist changes in inter-generational stratification processes such as the effects of social origins on education and status attainment (Bukodi and Goldthorpe, 2009; Gerber and Hout, 2004; Gerber, 2007; Luijkx et al., 2002; Saar, 2009; Simonova, 2003; Walder and Hu, 2009; Wu, 2010), this literature is less developed than analyses of intra-generational processes.

The potential effects of the institutional changes associated with market transition on inter-generational occupational stratification are less intuitively obvious than their effects on earnings and labor market outcomes. This is because it takes some time to observe changes in the origin-based patterns of investment in education that form the principle mechanisms of inter-generational inequalities in contemporary societies. Moreover, these studies generally share a limited theoretical agenda emphasizing whether and how market transition affects the magnitude of origin-based inequalities in educational and occupational attainments. For example, the rise of market institutions and retreat of state-based commitments to provide equal opportunity increased the strength of origin effects on educational and occupational destinations (Bukodi and Goldthorpe, 2009; Gerber and Hout, 2004). The present study breaks new ground by considering whether the collapse of state socialism leads to changes in the mechanisms shaping how parents' occupations influence those of their children.

This requires a theoretical model of how inter-generational occupational mobility operated differently under socialism than under market regimes. Here the existing literature offers little guidance. Numerous comparative mobility analyses have analyzed current and former state socialist countries (e.g., Breen, 2004; Erikson and Goldthorpe, 1992; Grusky and Hauser, 1984) and others have analyzed individual socialist countries (Bukodi and Goldthorpe, 2009; Ganzeboom et al., 1990; Gerber and Hout, 2004; Kolosi, 1988; Róbert and Bukodi, 2004a; Wong and Hauser, 1992). However, these studies examine whether state socialist societies depart from capitalist societies in their magnitude of occupational mobility rather than explicitly modeling one or more distinctive dimensions of mobility that directly reflect the unique institutional features of state socialist society. A more theoretically satisfying answer to the question of whether state socialist societies exhibited particular mobility patterns should propose at least one mechanism or dimension of mobility that is particular to state socialist institutions. Wu and Treiman (2007) stands out as an important attempt to conceptualize and measure a distinctive mobility regime in a state socialist society. However, their model of how China's hukou system created starkly different mobility patterns in urban and rural areas is not applicable to any other state socialist societies, because only China has had a hukou system.

We propose a model of occupational mobility based on four theoretically derived vertical dimensions of occupational resources—power, education, autonomy, and capital—plus a single horizontal dimension consisting of linkages among occupations in the same industry or branch of the economy. Our mobility model explicitly incorporates the political power associated with different occupations, an especially salient vertical dimension of inter-generational occupational linkages unique to state socialist societies due to the overwhelming political and economic control of their Communist Parties. We hypothesize that the power dimension is a signature feature of socialist-era mobility regimes that should, in principle, diminish or even disappear with the passing of state socialism and the consolidation of market institutions. We also expect the effects of education to remain roughly similar, the importance of autonomy and capital in inter-generational occupational inheritance to increase, and the role of horizontal linkages to decline as a result of market transition.

We estimate our model's parameters, which directly correspond to the five dimensions covered by our hypotheses regarding common and distinctive features of state socialist and market-based mobility regimes, using data from surveys conducted in Hungary during three periods: late state socialism (pre-transition), the era of transition to a market-based economy, and the post-transition period of 'market consolidation,' when market institutions had been clearly re-established. By analyzing a single country under state socialist and post-socialist conditions, we can explicitly test the effects of reigning political economic institutions (state socialism vs. markets), because potential confounding factors such as national culture or prior historical pathways are controlled by the focus on a single country.

To better capture independent variation among occupations along all five of our theoretically central dimensions, we analyze 'micro-class' mobility (Jonsson et al., 2009). Our model fits the data well and performs better than other conventional mobility models, including other theoretically-derived models and models that empirically scale occupations.

Comparisons of the magnitude and significance of specific parameters across the three periods covered by our data mainly support our hypotheses. State socialist mobility regimes exhibited distinctive characteristics from market-based mobility regimes that are inadequately characterized by statements regarding the overall level of mobility or the degree of divergence from the model of 'core social fluidity' (Erikson and Goldthorpe, 1992). Under socialism—but not during or after market transition—political power was a separate dimension of occupations that shaped how people's occupations depended on those of their parents. Education is an equally important component of occupational inheritance under both systems. The autonomy and capital associated with occupations play a greater stratifying role under market systems than under state socialism, while horizontal linkages among groups of occupations play a lesser, though still statistically significant role, in market systems than under state socialism. Additional analyses show only minimal variations in mobility parameters by gender and confirm that the changes in parameter values represent period effects rather than cohort replacement.

Our paper provides at least three important and new contributions to the literature. First, we shift the theoretical focus from the question of how changes in economic and political institutions influence the *strength* of inter-generational associations between occupational origins and destinations to the hitherto unexplored problem of how they influence the *mechanisms* that produce these associations. Second, we introduce a new inter-generational mobility model, the PEACH

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