



Social mobility and family expansion in Poland and Russia during socialism and capitalism

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ARTICLE INFO

Keywords:

Fertility
Social mobility
Economic context
Russia
Poland
Post-socialist

ABSTRACT

We explore whether social mobility influences fertility behavior, using multiple comparative layers to better observe structural and individual-level mechanisms at work. We locate this study in Poland and Russia during periods of socialism and capitalism. Applying event-history analysis techniques to longitudinal micro-data, we find evidence of a relationship between mobility and second birth risks for women only. Status enhancement aims seem the most plausible link between mobility and childbearing. The relationship appears moderated by the economic context, which we interpret as being related to differential selection into upward and downward mobility based on labor market opportunities. In general, the suppressing effect of upward mobility on second birth risks was stronger in the poorer economic context of Russia, whereas the increased second birth risks related to downward mobility were heightened in Poland's more prosperous context.

1. Introduction

This study raises a classic question from post-WWII sociology: Does social mobility affect fertility? Coining the term “social capillarity” (Bejin, 1989), Arsene Dumont explained declining fertility in France by the increased desire for upward mobility that became possible through the development of capitalism and democracy. At the heart of the social capillarity hypothesis is the idea that individuals' resources are limited and preferences for family or work must therefore be prioritized. This idea provoked an international debate in the 1950s, but after approximately 30 years research yielded surprisingly few consistent results. The topic subsequently receded from social stratification and demographic research¹ and therefore did not benefit from the theoretical and methodological improvements of past decades. Most consequentially, the sequencing of mobility and fertility events was largely ignored in past research because status comparisons were restricted to time points that were available in cross-sectional data. Past research also focused on the occupational class of husbands and fathers because it preceded women's growing involvement in the labor market. We attempt to revive the debate over whether fertility behavior is related to social mobility by addressing these shortcomings. Specifically, we apply a longitudinal approach to studying both inter and intragenerational mobility and fertility as well as study both men and women to explore

gender-specific relationships.

A re-investigation of how social mobility and subsequent childbearing are related is timely given the growing interest in both how fertility behavior may be influenced by the difficulties individuals face reconciling the demands of work and family and how economic difficulties affect individuals' fertility behavior. Research on these two factors explicitly addresses the role of context: The extent of the conflict between work and family demands varies depending on social norms governing the distribution of care within a household and the degree to which states offer support to men and women in their roles as earners and carers (Billingsley & Ferrarini, 2014; Esping-Andersen, 2009). Similarly, economic expansion or recession influences mobility prospects through reductions in employment as well as how opportunities are distributed (Hachen, 1988; Rosenfeld, 1992; Sobotka, Skirbekk, & Philipov, 2011).

We compare the relationship between mobility and fertility across multiple contexts. Poland and Russia shared a similar context before the 1990s, when command economy practices provided relatively low incentives for upward mobility in regards to wages. In addition, state support lessened the conflict between work and childbearing, as women were expected to play the dual roles of “producer and reproducer” (Phizacklea, Pilkington, & Rai, 1992, p. 2), which may have lessened the difficulties mothers faced achieving upward mobility. Although

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¹ Studies on whether fertility influences the social mobility of one's children (Dalla Zuanna, 2007; Dribe, van Bavel, & Campbell, 2012; Johansson, 1987; Van Bavel, 2006) or whether fertility affects social mobility (e.g., Aisenbrey, Evertsson, & Grunow, 2009) remain current research interests.

both countries underwent a period of economic turmoil in the early 1990s, which was characterized by a rapid decline in GDP and the new phenomenon of unemployment (particularly in Poland) as well as a decrease in the value of wages (particularly in Russia), this period was much shorter in Poland, where reforms quickly led to economic stability and growth. Among former “Eastern Bloc” countries, Poland and Russia represent average good and poor performers, respectively, after beginning their transition from communism. Both countries also reduced institutional support for reconciling the conflict women face from the demands of work and childbearing. Alongside this dramatic structural change, fertility rates plummeted from the above replacement levels in the late 1980s to the lowest low fertility levels in the early 2000s.

In our study we focus on the transition to a second child; because parenthood is generally universal in the two countries, there is more heterogeneity in the choice to have a second child. In addition, declining second birth rates have been crucial for overall declining fertility rates in the two countries (Zeman, Beaujouan, Brzozowska, & Sobotka, 2017). We observe second births among men and women and in both socialist and post-socialist Poland and Russia. This study follows the convention of studying both intergenerational (between two generations) and intragenerational (career development) mobility measured with occupational class. Two questions primarily guide this analysis: Is there evidence that social mobility is related to childbearing? Does this influence appear to vary in different contexts? We use a “critical juncture” approach (Neyer & Andersson, 2008) to isolate the influence of structural differences over time within a country and focus on dissimilarities between the two countries to explore the role of structural factors during market reform.

2. Social status, mobility and fertility

Social origin has a well-established link to fertility behavior via inherited values and preferences toward family size (Preston, 1976) as well as the intergenerational transmission of social status (Duncan, Freedman, Coble, & Slesinger, 1965). Both past and current social class may contribute to fertility behavior if individuals inherit class habits but also acquire those of the new class (Berent, 1952), or both past and current levels of resources influence behavior. These arguments have been used to explain why we might see different behavior for mobile individuals than those with a constant status.

Beyond this additive effect of origin and destination status influences, social mobility has been argued to have an effect as a “process” (e.g., Duncan, 1966; Kasarda & Billy, 1985). The social capillarity – also called status enhancement – argument is based on the idea that status enhancement desires determine both mobility and childbearing; individuals who are strongly status-oriented focus their resources toward career development and individuals who are strongly family-oriented focus their resources toward childbearing (Kasarda & Billy, 1985). In this argument, social mobility is therefore not causally linked to fertility behavior, but negative effects of upward mobility and positive effects of downward mobility on fertility will be observed if they are driven by the process of achieving status or family aims. A later hypothesis proposed the exact opposite relationship: a downward turn in economic status induces fertility avoidance and vice versa. The “relative economic status” mechanism ties into the vast literature on the Easterlin’s (1976) theory that a decline in the socio-economic status of young workers in comparison to their parents’ (lower earnings, higher unemployment, and lower upward occupational mobility) suppresses childbearing, whereas upward mobility improves the conditions for family formation (Easterlin, 1987).

The relationship between social mobility and fertility and the proposed mechanisms were widely tested and discussed in the empirical research from the 1950s to 1980s (e.g., Bean & Swicegood, 1979; Berent, 1952; Blau & Duncan, 1967; Bresard, 1950; Hope, 1971; Kasarda & Billy, 1985; Sobel, 1985; Stevens 1981; Westoff et al., 1963;

Zimmer, 1981). Findings were inconsistent and of questionable reliability (for a review see Stevens, 1981). One serious shortcoming involved limitations of the data, which were mainly cross-sectional and did not allow investigating how pre-birth mobility relates to subsequent childbearing. But there were two other major drawbacks to past research.

First, this literature revolved mostly around how men’s mobility was associated with women’s fertility behavior, whereas current discussions related to social status and childbearing involve women’s social status as well. Labor force participation and earnings were for a long time argued to be positively linked to childbearing for men and negatively linked for women (Becker, 1981) because men were predominantly breadwinners who were responsible for maintaining the family and covering child-related expenses while women’s earnings created opportunity costs due to child-related work interruptions. Changes in the organisation of the household from the model of sex role specialisation to the pooling of resources (Oppenheimer, 1997), expansion of women’s education (Van Bavel, 2012), increase in economic insecurity (Macunovich, 1996) and the development of family policies aimed at reconciling paid work and family in many countries (Esping-Andersen, 2009, Matzke & Ostner, 2010) led to the situation in which the relationship between women’s socio-economic status and childbearing became more ambiguous. On the one hand, women still do most of the childcare and withdraw from economic activity for longer than men after childbirth (Dotti Sani, 2014). On the other hand, however, it has become common for women to return to employment sometime after birth and combine paid work with childrearing (Goldin, 2006; Matysiak, 2011). Moreover, women’s earnings have become more decisive for the economic well-being of households (Klesment & van Bavel, 2017). These developments took place particularly early in Eastern Europe where women were highly present in the labor force on a full-time basis already in the 1970s. Empirical research shows that the micro-level relationship between women’s labor market outcomes and fertility behavior is still negative in most of the developed countries (Matysiak & Vignoli, 2008) and unemployed women may be more likely to have a child than those in paid work (e.g. Inanc, 2015; Kohler & Kohler, 2002). But mothers’ labor market outcomes appear to vary across countries and are better in contexts with more generous public support for combining paid work with childrearing (Misra, Budig, & Boeckmann, 2011; Uunk, Kalmijn, & Muffels, 2005), stronger economic necessities (Matysiak & Vignoli, 2013; Uunk et al., 2005), and weaker labor market rigidities (Adserà, 2005; Ahn & Mira, 2002). Overall, understanding how women’s mobility influences childbearing will contribute to these debates, as will the analysis of how the relationship varies across contexts. The study also contributes to the discussion on men’s mobility and fertility, as women’s entry to the labour market and improvement in women’s earning potential might have weakened the importance of men’s careers for partners’ childbearing decisions.

The second shortcoming is that no distinction was made between how intergenerational and intragenerational mobility should operate. This is likely due to a mechanical property of mobility, by which experiences of intragenerational mobility in job histories often entail intergenerational mobility and vice versa. While measurement choices can influence how closely inter and intragenerational mobility are correlated, some substantive differences in the cases that are not mechanically related are worth considering. In particular, upward mobility that is intergenerational and not intragenerational may occur when individuals leave education to begin a career in a high occupational class. Early investment in education that is immediately followed by intergenerational mobility may indicate well-formed, persistent preferences for a specific career or status; alternatively, it may indicate mobility that is less self-motivated because mobility through education is more likely to be family or state sponsored than mobility occurring through job advancement (Turner, 1960). In another scenario, an individual may never be downwardly mobile intragenerationally but still experience intergenerational mobility if entering the labor market at a

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