

Pathways of change in social mobility: Industrialization, education and growing fluidity in Brazil[☆]

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Abstract

This paper explores the change in intergenerational class mobility over the last quarter-century in Brazil. Using repeated cross-sectional surveys between the early 1970s and the late 1990s and a counterfactual approach, we disentangle cohort from period interpretations of change, and examine the mechanisms driving change in fluidity among Brazilian men. We detect a substantial increase in social fluidity over time, which emerges from period transformation, rather than cohort replacement. This trend departs from industrialized nations, where growing fluidity has been found to be entirely driven by the replacement of older, more rigid cohorts by younger, more fluid ones, and to emerge from educational equalization and a “compositional effect”—educational expansion combined with a weaker intergenerational association among those with higher education. In contrast, in a context of rapid late industrialization, two mechanisms account for growing fluidity in Brazil: the decline in the “economic returns to schooling”, and the weakening of the direct influence of class origins on class destination, net of education. We discuss the implications of these patterns for the understanding of mobility dynamics in different national contexts.

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1. Introduction

Intergenerational mobility, the association between parents and children in terms of class, income, or other measure of economic advantage, is an important measure of equality of opportunity. Recent findings indicate that intergenerational mobility has increased in most, but not all, industrialized countries (Erikson, 1987; Hout,

1984, 1988; Jonsson & Mills, 1993, national chapters in Breen & Jonsson, 2007; Breen & Luijkx, 2004, 2007; Breen, 2004). These findings raise two important questions. The first is about the *type* of mobility change: Is the change in intergenerational association a period phenomenon that affects the entire adult population, or does it occur via cohort replacement? The second is about its *mechanisms*: What is the role that education plays in mobility dynamics?

This article studies trends in intergenerational mobility, and address both questions for Brazilian society. While most mobility research examines advanced industrial nations, Brazil provides an interesting case study of vertiginous, late industrialization, contributing to an emerging literature on “late industrializers” (Ishida,

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2008). Among industrialized nations, Brazil can be compared with the Irish case (Hout, 1989; Whelan & Layte, 2002, 2006). As Ireland, Brazil recently transformed from a rural, agricultural society into an urban, industrial one. In contrast to Ireland and to other industrialized nations, however, the Brazilian economic expansion – which had been the fastest in the world during the 1960s and 1970s (Abreu & Verner, 1997) – came to an abrupt halt in 1980, and was followed by almost two decades of economic stagnation and volatility.

The Brazilian case offers therefore the opportunity of tracing the change in mobility through these two distinct economic periods. But it offers more than a description of trends. Using comparable cross-sectional surveys from the early 1970s to the late 1990s and a counterfactual approach devised by Breen (2008), we adjudicate between period and cohort interpretations of change, and evaluate the role of education in the fluidity process.

Period and cohort provide two alternative accounts of historical change. Period effects refer to economic, political or cultural events that affect the entire population. For example, if access to a new technology favors everyone living in a particular historical time, it will constitute a period effect. Cohort effects, in contrast, affect only some age groups – usually younger ones – altering their formative experiences with strong durable influences (Ryder, 1965). A new technology is likely to have a cohort effect insofar as younger, but not senior, cohorts adopt and benefit from it. From a cohort perspective, social change will occur through a slow demographic dynamic of replacement in which older cohorts exposed to specific socialization events are substituted by younger ones exposed to different formative experiences.

Distinguishing between period and cohort mobility dynamics is important to gauge the speed and extent of macro-change and to understand the individual or institutional mechanisms driving changes in mobility. So far, most studies of temporal change in mobility adopt a period perspective while a few focus on cohort change (Hout, 1988; Müller & Pollak, 2004; Vallet, 2004). Only recently have researchers started to adjudicate between cohort and period interpretations of change (Breen & Jonsson, 2007; Breen & Luijkx, 2007). Based on the analysis of European countries, these recent studies show that change in fluidity is largely a *cohort* phenomenon, driven by the replacement of more rigid older cohorts by more fluid younger ones. This finding has led researchers to hypothesize that “most changes in fluidity that we observe in stable democratic societies will arise from processes of cohort replacement” (Breen & Jonsson, 2007: 1782). From this perspective, period change in

mobility would emerge only under unusual circumstances, for example, the market revolution that followed the socialist regime in Eastern Europe in the early 1990s, which appears to have altered the returns to educational assets for the entire working population rather than specific cohorts (Gerber & Hout, 2004; Róbert & Bukodi, 2004).

But is period change a result of only unusual circumstances? Addressing this question requires examining diverse national experiences, and it requires exploring the varied mechanisms driving mobility over time. Given that education is the main channel through which both class mobility and class reproduction occur (Blau & Duncan, 1967; Hout & DiPrete, 2006; Ishida, Müller, & Ridge, 1995), this search naturally starts with the role of education in the fluidity process. Using the well-known “ODE triangle” formulation (e.g. Hout & DiPrete, 2006: 6), four components of the mediating role of education can be distinguished. They include the association between social origins and education (“inequality of educational opportunity”); the association between education and destination (“returns to education”); and the origin–destination association net of education, which involves class-based resources that contribute to the reproduction of advantage and that are uncorrelated with education, such as the “inheritance” of cultural capital, social networks, or non-cognitive skills. The fourth component of intergenerational association refers to a three-way interaction between ODE, called a “compositional effect” and first reported by Hout for the U.S. case (1984, 1988). A compositional effect emerges if the intergenerational association is weaker among those with higher education – resulting, for example, from the meritocratic character of the labor markets for highly skilled workers – and if educational expansion pushes growing numbers of successive cohorts into higher educational levels, inducing a decline in the gross origin–destination association.

Educational equalization has been documented for several European countries (Breen, Luijkx, Müller, & Pollak, 2005), promoted by the fall in the direct and indirect cost of schooling, and the postponement of the age at which crucial educational decisions are made (Breen & Jonsson, 2005). A compositional effect has also been found to be important. Besides the US, a weaker intergenerational association among those with higher education has been documented in France, Sweden, and Germany (Breen & Jonsson, 2007; Breen & Luijkx, 2007; Vallet, 2004).

Both mechanisms – educational equalization and a compositional effect – involve the attainment of education, which is completed by most individuals in their

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