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Review of the PhD thesis

„The Role of Fertility Changes in (Post)-Socialist Europe”

accomplished by

Zuzanna Brzozowska

under the supervision of

Professor Janina Józwiak and Dr. Krzysztof Tymicki (auxiliary supervisor)

and submitted to the

Collegium of Economic Analysis, Warsaw School of Economics, Poland

(Relevance of the research question)

Brzozowska selected a highly relevant research question; she aimed to document, to measure and to understand differential fertility in terms of educational achievement especially during the socialist reproductive regime. The research of educational differences in family formation, especially partnership dynamics and fertility behaviour is ample, since in modern and developed societies individual decision making shape more and more overall fertility, and therefore differentiation is more and more expectable. If differences are looked for in the society, than differences in terms of educational achievement is not only a plausible but a proper option, since both economic resources and cultural patterns are strongly related to it. The selection of education as differentiating factor is therefore is not new, but very relevant. What is new, that Brzozowska is measuring educational differences in fertility i) during the communist (state-socialist) time, ii) in a comparative setting, and iii) using a rarely used fertility measures, that of the completed fertility. Reading Brozozowka’s analysis, we can state, it was worth and fruitful to “go back” to the communist system, and have a closer look

on the communist reproductive system. She found, unexpectedly, that there were enormous variations in terms of completed fertility across the countries if educational attainment is taken into consideration. Of course, social scientists in the East were aware, that there are differences “behind the Iron Curtain”, but we were also aware, that the communist political and social system, the redistributive economic system are strongly standardizing and uniformizing the life, and that of the circumstances of people’ decision making. As a consequence, fertility behaviour seems to hardly differ across the communist (state-socialist) countries. From that point of view, and I will come back to this issue later, Brzozowska’s research results are really new and illuminating. Furthermore, the results are interesting not only for demography, but also for all social science disciplines (economy, sociology, and political science), since it gives us new insights on the functioning of the communist system in general.

(Structure of the thesis)

The PhD thesis consists of 6 chapters. The first introduces the topic, formulates the research questions, and gives us a theoretical outline. Here should be mentioned too, that also the analytic chapters include, although in various extent, theoretical considerations and discussions. The subsequent four chapters examine educational differences in focusing different aspects of fertility and different time periods. The first analytic chapter (Chapter 2) investigates the long term trends of cohort fertility by level of education in a comparison of seven communist (state-socialist) countries. Here we find an extensive and proper introduction into the employed decomposition technique. The next chapter (No. 3) looks for educational differences in childlessness in comparing western and eastern European countries and following the cohorts from 1915 to 1965. (Surprisingly, educational differences seem to diminish rather than remaining in this regard.) The next chapter (Chapter 4) supplements the first empirical analysis in chapter 2, since it evaluates the educational expansion by decomposing cohort fertility into compositional (changing the distribution according to education) and direct (changing fertility within the educational groups). The last analytic chapter (Chapter 5) focuses on a smaller segment of the society, and analyses age and educational specific changes in birth to single mothers in Poland. This section concentrates mainly on the development during the post-communist period. The closing chapter summarizes and confronts the results of the empirical analyses and the theoretical approaches, and draws into new theoretical perspectives when looking for understandings and explanations.

(Theory and literature)

It is notwithstanding from the thesis that Brzozowska not only knows the relevant literature, but also uses and refers it adequately. She is familiar with the theories of fertility, with the literature of West-East differences, with specificities of communist and post-communist societies. She knows the approaches used to explain differential (education-specific) fertility. This is true with the relevant analyses whatever it is a micro or a macro level analysis.

Accordingly to the structure of the thesis, the theoretical considerations are spread thought the chapters unevenly. The first and third chapter has the most extensive and strongest theoretical sections, the fifth the narrowest. The second and fourth devote more attention to the post-communist specificities. The last (6th), summarizing chapter bring once more the relevant theoretical approaches, but introduces some new approaches too.

We think that the third chapter is the most elaborative from the theoretical perspective; here we can see a really extensive, well organised discussion of the different theoretical approaches. We were slightly less satisfied with the theoretical section at the introduction (Chapter 1), and some points could be mentioned. Firstly, it is true that the literature regarding the educational gradient and completed fertility is not so abundant. However, that of the relation of educational achievement and fertility in general is very reach, and there are several papers, who state, that a) the strength of negative relation may change in time, and may be society specific, b) in some societies the relation is kind of U shaped (for a summary see Andoka 1978, Liefbroer and Corijn 1999). This could have been mentioned form the point of view of the key assumption (negative educational gradient). Secondly, we would have considered a slightly different structure and extent of the discussed theories. We find that the economic theory could have been elaborated more, and perhaps extended with the human capital approach (see Gustafsson 1991). The same is true with the institutional setting approach, since the communist system is an institutional setting *per se*. Next, it is worth to consider, that the normative approach is not only as a change “from the individualistic perspective” (p. 13.), but a theory on its own. Lastly, the second demographic transition approaches (I consciously do not mention it as a theory) have also many faces, and I owe to this approaches less relevance if considering the communist time.

Regarding the summarizing chapter, we were very happy, that Brzozowska was not only able to compare and to contrast the introduced theoretical approaches and results of the empirical analyse, but bring into new insights to understand the unexpected results. At the end it should be clear, that this remarks belongs to the scientific discussion, and not questioning

Borozowskas' ability that she is able to review and discuss the theories relevant to empirical analyse.

(Used methods and preparation of the data)

The selection of methods and techniques of the empirical analysis is adequate and well justified. Well known general fertility indices, such as completed total fertility rate, rate of childlessness and composition according birth parities show us the general and education specific trends. The used decomposition method, decomposing general development into compositional and direct effects, enables us to identify the effect of educational expansion and that of behavioural changes of educational categories. The selected decomposition-techniques is well known, and relevant, and unfortunately not so often used in the analyses of fertility development. I was very happy to see how effective and revealing this method is.

The used data is not only relevant, but new, and unique. Of course census data is an obvious source of analysing completed fertility, however is rarely used, especially rarely in a comparative setting. The creation of the database the Cohort Fertility and Educational Data Base, is especially important in fostering such kind of research. (As we understand the author is also contribution to creation and cleaning of this database, that is/will be available for general research purpose.)

(General results, interpretation)

We find the empirical results regarding the communist fertility patterns are extremely important from the point of view of demography in particular, and also from the point of view of social science in general. It is the fundamental statement of the thesis, that differences in childbearing behaviour existed both during the "high time" of state-socialism, and also around the end of the state-socialist period in terms of educational differences of ultimate number of children (CTFR). This is the crucial message of the chapter 2 and of the whole thesis for me. Why is this result so important?

If the demographic development of the European communist (state-socialist) countries is considered, their commonalities and their uniformity is usually stressed. This is well justified from several aspects, two is mentioned subsequently. On the one hand, general indicators of family formation and fertility pointed towards the universality of marriage, early childbearing and two child family pattern. This is also demonstrated during the thesis accordingly, when the general trends of completed fertility (chapter 2 and 4) and of childlessness (chapter 3) is considered. On the other hand, and there is no space to go into this

issue deeper here, the basic mechanisms of political, economic and social system were uniform. This, furthermore, generated very similar, if not the same circumstances for childbearing decision in all communist countries. Convergence from this point of view was obviously expectable. Brzozowska's thesis highlights several converging trends, adequately. Namely, she shows the decline of completed fertility, the decline of ultimate childlessness, the decline of the presence large families.

However Brzozowska is also able to show crucial differences across the countries during the communist time. As long in some countries (Croatia, Czech Republic, Hungary, Slovenia) educational differences in completed fertility are diminishing, in other countries (Poland, Romania, Slovakia) vast differences remained. (Especially surprising is the case of the two countries of Czechoslovakia. People lived among the same institutional circumstances for 70 years, however their pattern of completed fertility differ in terms of level of education of the mothers.) How can it happen, that in some countries the 40 years of communist system produced quite homogenous family patterns in terms of education, whereas in others profound educational differences the number of ultimate children decrease steeply with increasing education (negative educational gradient)?

Before answering this questions at the summarizing chapter, Borozowska devote her attention to childlessness and educational differences (Chapter 3), to the Polish case, where she took into consideration age specific changes, too (Chapter 4).

Lastly, in the chapter 6, where summarizing the research results, and interpreting, discussing of them, Brozowska come up with two ideas. Firstly, she states, that in those countries (PL, ROM, SL), where educational differences exist also at the end of the communist time, are latecomer in the so called "demographic transition" (page 120. ff.). These countries have had much higher fertility at the eve of the communist time. Secondly, she highlights, that the mentioned there countries had much more restricted contraceptives policies, abortion practice. In these countries modern contraceptive methods were not easily available (page 121, ff). Both supplied explanation are interesting, relevant and plausible. Concerning the first one, a more historical elaboration would be advantageous, but that would go beyond the scope of the thesis. Regarding the second one, Brzozowska should rely on country reports, since comparative studies do not exist. However it is tempting to test/contemplate if differences in circumstances of living conditions (eg. female employment, child related policies) and cultural specificities did not exert any effect. Szeleva and Polakowski 2008, for example, discussing changes in family polices of CEE countries, not only shows the different changes during the transition, but also, that there existed vast

differences in principles of social supports during the communist time. Perhaps these did not have any influence, but it is tempting not to deny their possible relevance. The raised questions here are rather questions for further research the request from the reviewed thesis.

As far as the comparison of the Western and CEE countries, I was very happy to read the comparison of childlessness (chapter 3), and find the similarities in childlessness as an important novelty. However I would be more reserved with the stressing the similarities in the summarizing chapter (p. 116). Not because it is not true, but because the comparison of CEE countries during the communist time was the main target of the research.

Lastly, I would like to stress once more, the basic findings are of general relevance, since on the one hand contribute to understand the communist system as such, and on the other hand supplement clearly the knowledge of the discipline of demography. Furthermore, the key results of the thesis clearly exemplify how important is the analysis of the past of the CEE countries, and attention should be devoted to them in the future, too.

(General recommendation)

I am sure, that the above state clearly, that Zuzanna Brzozowska's work, "*The Role of Education in Fertility Changes in (post-) Socialist Europe*" submitted to the Warsaw School of Economics, Poland, constituting the PhD thesis, clearly and unequivocally meets the formal and scientific requirements set for a thesis. It offers new and novel insights into the relation of educational differences, in them of level of education and of completed fertility in particular, and into the fertility development and of the nature of the communist system in general. Her work proves clearly Zuzanna Brzozowska's theoretical knowledge in demography and related sub-disciplines such as in sociology and economics, proves her ability to select and use adequate methods and techniques if looking at specific research questions, and confirms her abilities and skills as a researcher. Taking into consideration all the above mentioned, I evaluate her work as outstanding according to international standards. I conclude to proceed with the PhD procedure and to approve a public defence of the PhD thesis by Zuzanna Brzozowska.

Budapest, 30.06. 2016.



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