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Education, Occupation and Social Origin

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Gian Luca Battilocchi*

[Review of the book: Education, occupation and social origin. A comparative analyses of the transmission of socio-economic inequalities, by F. Bernardi & G. Ballarino, Edward Elgar, Cheltenham, 2016. ISBN 978 78536044 2]

Is education “the great equalizer”? Are western developed democracies “education based meritocracies”? These relevant questions in both public debate and social research form the subject of this collective volume. Such issues are strictly intertwined, so that the idea that education makes people equal despite different characteristics such as gender, ethnicity and social origin, (the so called “Education as the great equalizer” (EGE) thesis) can be considered a weak variant of the “Education based meritocracy” (EBM) thesis, which consists of the three following propositions:

1. 1) there is no (or decreasing) association between social origin and educational attainment;
2. 2) the occupational outcomes of an individual depend (increasingly) on educational level;
3. 3) there is no (or decreasing) association between social origin and labour market position (in other words, no intergenerational transmission of advantage/disadvantage).

These claims delineate a specific view of the relationships among the vertices of the origin-education-destination triangle (OED), representing the main factors involved in the processes underlying the intergenerational reproduction of inequalities.

An EBM thesis is consistent with classical theories of industrialization and post-industrialism (Bell, 1976) and supported by a lot of socio-economic events. Recruitment processes in modern labour markets would be increasingly driven by educational qualifications as productivity signals. This trend

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in turn would be boosted by industrialization and by the growing firm size and bureaucratisation of personnel selection.

As is known, EBM thesis has been rejected vigorously by John Goldthorpe, who pointed out the persistence of a direct effect of social origin due to specific characteristics of modern societies and economies:

- the expansion of higher education and the consequent decrease of the signalling value of educational qualifications;
- the development of the service sector and the increasing importance of non-cognitive skills (typically “non meritocratic”) rather than formal educational qualifications.

Whilst literature has mainly addressed inequalities in educational opportunities and variations in educational returns (the Origin-Education and Education-Destination sides of the triangle), less concern has been devoted to the direct influence of social origin on occupational outcomes, over and above the achieved education. Therefore, the main purpose of the volume is to bridge this gap in the literature, and especially to “establish the phenomenon”, (Merton, 1987), namely showing the existence of a direct effect of social origin, rather than providing or discussing explanations of the family background influence.

This collective endeavour places itself in a tradition of comparative research upon the role of education in the production of social inequalities, starting from the classic work of Shavit and Blossfeld (1993). The book consists of 14 chapters devoted to as many developed countries (France, Germany, Hungary, Israel, Italy, Japan, Netherlands, Norway, Russia, Spain, Sweden, Switzerland, United Kingdom and United States). National case studies address the same four research questions, providing plenty of data and analyses. Research issues concern: 1) the existence of a direct effect of social origin on occupational outcomes, net of education, and 2) its variations over time and 3) by level of education; 4) changes in returns to education over time.

In order to compare country analyses, characteristics of the samples, modelling techniques and the selection of variables have been defined through common guidelines. National samples had to consist of people aged 28-65, excluding first generation immigrants. Data are drawn from different sources: national and international surveys (for example the European Social Survey and the International Social Survey Programme), panel studies (like the German Socio-economic Panel or the British Household Panel Survey) and in a few cases censuses or administrative registers. When a panel was not available, longitudinal data-set have been built using a number of survey cohorts.

If possible, first job and current job at the time of the survey are considered. Two measures of occupational attainment are primarily used: the

ISEI - International Socio-economic Status Index (Ganzeboom & Treiman, 1996) and current earnings. Some chapters consider also social class, using the Eriksson - Goldthorpe - Portocarero (EGP) class schema (Eriksson & Goldthorpe, 1992), however reaching conclusions similar to those obtained with the ISEI-based analyses.

The use of both sociological and economic indicators to measure stratification and mobility can be surely considered an original and unprecedented aspect of this work. According to the scholars, the combination of data relating to occupational status and income, and also the potential discrepancies of findings, consistently with a multidimensional approach, allows a more complete and nuanced picture of the phenomena.

The essential methodological option of the research project is the use of linear regression models instead of more widespread relative measures of inequality based on odds-ratios. At the basis of this choice there is a fundamental theoretical reason: the opportunity of taking into account the interplay between structural changes (occupational structure upgrading and educational expansion) and intergenerational association of status at the individual level. Furthermore, the resort to linear regression models is justified by the purpose of providing more intelligible measures of the intergenerational transmission of advantage, in terms of additional euros as well as of points on a scale of quality of the occupation, an individual can expect to obtain due to his/her socio-economic background and net of education achieved.

The main and clearest finding of the book is the *existence and stability over time of a direct effect of social origin in the fourteen countries examined*, and so a sizeable deviation from an exclusively education-based process of job allocation, documented by all national studies. Although the researchers notice that most of the intergenerational transmission passes through education, a substantial effect of social background is generally recorded.

The collected evidence allows to estimate a direct influence on occupational outcomes larger than what is expected by both the ethnic and the gender factors. Moreover, a direct effect on income was found, although greater differences across countries and difficulties in the comparison.

The authors also discuss (and substantially reject) the risk of overestimating the influence of social origin, due to a bad or incomplete measurement of education, not taking into account horizontal heterogeneity of educational qualifications (relating to fields of study and different prestige of academic institutions).

In contrast with the modernization argument, which assumes that ascription effect in social stratification will decrease over time (Blau & Duncan, 1966), data from country studies show an overall stability of the direct influence of social origin on occupational outcomes (measured with ISEI), with only few exceptions. Netherlands and Sweden present a U-shaped trend,

while in France and Israel a decrease is recorded. Less clear and consistent are the results of the analysis when income trends are considered.

Addressing this issue turns out to be especially interesting in the case of countries like Italy, where modernization process is relatively recent or seems incomplete. In this regard, Barone, Ballarino and Panichella, the authors of the Italian chapter showed the existence and stability over time of the intergenerational occupational association and put in evidence an overall decline of returns to education. Significant variations of the direct influence of social origins according to the education level suggest however that Italy can be considered a fully modern country, even if it shows specific features of the stratification model.

These two first findings clearly challenge the EGE thesis. However, it has been argued that tertiary education plays effectively the role of equalizer: in an influential study, Hout (1988) found that, for university graduates in USA, there was no association between social origin and occupational status. Explanations of these findings brought into play a supposedly more meritocratic character of the labour market for the highly educated but also a positive selection effect of skills and personality traits of tertiary graduates from disadvantaged backgrounds.

In respect of this issue, national data and analyses in the country chapters provide a less clear-cut pattern: a consistent effect of social origin was found for lower educated people, as regards occupational status or social class, whilst a substantial effect on income is recorded for better-off educated. The authors, however, adopt a different point of view, focusing on low achievers from advantaged families, which seem to display specific strategies to improve occupational outcomes of their offspring. In such case, the action of parents would produce two different consequences in favour of their children's occupational attainment: a compensatory effect and a boosting effect.

As a result of the *compensatory* effect, persons with a low level of education from the most advantaged families are likely to attain better occupational positions than those with a similar level of education but a disadvantaged background. Due to the *boosting* effect, among higher educated people, those coming from the upper classes should benefit from an earnings premium, compared to those with a more deprived background.

Evidence collected seems to be consistent with Hout's explanations and support both of the effects of social origins. On the basis of these findings the author suggest that Boudon's theory of social demotion avoidance (1974) could be complemented with a wider view of the forms of activation of the advantaged families to promote social mobility of their children.

Moreover, for all countries where the data are available, another important finding in support of the compensatory effect concerns the greater size of the direct effect of social origin on the current job rather than on the first

job. Socio-economically advantaged families would be able, over the course of the career, to contrast any downward intergenerational trajectories in the early-stage, which is nonetheless in line with the so-called counter-mobility argument.

Findings from country studies don't allow to outline a general pattern as regards the last research question, relating to the existence of a trend in educational returns over time. Results differ significantly when socio-economic status rather than earnings is considered; furthermore, as regards increasing or decreasing income trends, national country studies show a marked variability. This evidence doesn't provide support to neither of the main theories in this regard: the so called skill-biased technological change and the inflation of educational credentials hypothesis. The explanation of the high variance of patterns among countries is found in the extremely differentiated interplays between educational expansion and occupational upgrading in the fourteen countries examined.

As already mentioned, one of the basic options of this collective research has been the consideration of both occupation-based and income-based measures of status. The choice of a multidimensional measurement is suggested also as a guideline for future research, in order to overcome the typical limitations of a single measurement strategy and to pursue a more accurate and comprehensive picture of the forms of intergenerational socio-economic association.

As regards mechanisms of intergenerational transmission of inequalities, the authors put forward the interesting proposal to explore specific patterns for given occupations, identifying the professions for which the compensatory advantage rather than the boosting effect mainly occurred, in order to establish a more detailed map of the phenomenon. Then, in a qualitative perspective, ethnographic research on the recruitment processes for those occupations, as well as on family behaviour facing children's low educational achievement, is deemed very worthwhile.

The use of socio-psychological variables in addition to the socio-structural ones is also pointed out as a possible expansion of the analytical approach of the book (as it happens in the Swedish chapter, which considers personality traits such as non-cognitive skills or emotional dimensions).

Moreover, improvements in theory are recommended in the direction of a shift of emphasis from household's resources to family's agency (Alkire, 2008) primarily articulating purposive initiatives and unintentional effects, in the wake of Boudon's (1979) classic distinction between primary and secondary effects.

In conclusion, the authors point out that the finding that education is not the great equalizer absolutely doesn't provide reasons for reducing public investment in schools and universities. The results of the collective research

only demonstrate the insufficiency of education for policies aimed at reducing the intergenerational reproduction of inequality and suggest indeed the adoption of a package of heterogeneous measures (from household income support to quality childcare and extracurricular activities provision) in order to break effectively the cycle of disadvantage.

The book is undoubtedly of interest for social scientists and for social policy experts as well, primarily because of the relevance of issues and research questions, which permeate public debate and inform political views. What appears more valuable in the volume is the depth of knowledge provided by national case studies with rich background information and articulate analyses; heterogeneity of sources and data-sets doesn't however allow a strictly comparative effort, which is limited to the level of country chapter's findings and conclusions.

Although the option for a multidimensional measurement proves shareable in order to provide a more detailed knowledge of stratification and mobility processes, the discrepancy of answers to some of the main questions of the book, when using income-based rather than occupation-based measures, is a point that seems to require a supplement of investigation.

To conclude, I would suggest that, if formal education, according to the findings of the book, doesn't play the role of the great equalizer, it could also be fruitful for future research, focusing increasingly on non formal aspects of education, investigating their link with social stratification processes, and assessing an equalizing potential for individual life chances in modern societies.

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