

# Editorial on the Special Issue “Demographic Developments in Eastern and Western Europe Before and After the Transformation of Socialist Countries”

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## 1 Introduction

In 2019, the organising committee of the Annual Meeting of the German Society for Demography (DGD) proposed a joint conference with the Hungarian Demographic Research Institute, the Estonian Demographic Association, the Czech Society for Demography, and the Committee on Demographic Studies of the Polish Academy of Sciences. The conference was to be hosted in 2020 by the Center for Demography and Diversity at TU Dresden, with the theme of “Demography in Central and Eastern Europe – Demographic Behaviour since 1990.” The aim was to revisit demographic changes and developments thirty years after the beginning of the social and political transformation process in Central and Eastern Europe. A call for papers was issued, drawing many submissions from participating countries. The German Research Association (DFG) funded the conference with twelve sessions and additional keynote lectures. Unfortunately, the event had to be cancelled just two days before it was due to take place because of the spread of SARS-CoV2 and the first wave of COVID-19 infections in Germany. Our work appeared to have been in vain until Zsolt Spéder came up with the idea of proposing a special issue to *Comparative Population Studies* (CPoS) on the topic of demographic developments in Eastern and Western Europe after the transformation of socialist countries in 1989/90. The aim of this proposal was to (re-) evaluate the transformation from a theoretical and comparative perspective by providing a balanced view of the post-1989/90 transformation across all three demographic processes: family and fertility, mortality and health, and migration. This was achieved by incorporating the perspectives of Eastern, Central, and Western European researchers, including research articles from both young and established scholars. After three years of intensive work, the special issue now comprises ten articles (see Table 1) covering various topics in the research areas of family dynamics, life expectancy and health development, and international migration. It is a genuine testament to European cooperation and convergence in demographic research, even if convergence has not always occurred in the demographic processes we study.

## 2 Thirty years of transformation processes in Eastern and Western Europe

Three decades ago, Europe underwent a profound change: the former socialist countries bid farewell to totalitarian political systems and the redistributive economy based on state ownership and planning. Moving towards a Western European social model, most states established political systems based on competitiveness and democratic rules, reintroduced market economy based on private ownership open to the world market, and expressed a desire to belong to the European Union, followed by successful accession of several countries. Welfare state policies were also fundamentally reformed and labour markets deeply restructured, leading to rapidly growing economic opportunities but also uncertainties among the population. This “transition” affected all layers of society. However, not only Eastern but also Western Europe may have changed in this process – influenced by high female labour force participation present in Eastern countries, presence of a family formation pattern, and adopting values and norms regarding gender equality. Social and regional differences in (healthy) life expectancy have increased, and international immigration has reached new highs. To what extent did the profound changes that took place in the early and mid-1990s and the considerable adjustments that have taken place since, created new conditions that have encouraged changes in demographic behaviour, and what kind of behaviours were favoured?

Before describing and discussing the papers in this issue of CPOs, we will first outline the relevant processes of transition and ongoing change that provide the societal context for changing demographic behaviour. This provides context for interpreting the studies contained in the special issue.

Both the intense “revolutionary” period of transition and the slower but constantly reforming and transforming period that followed, and their aftermath, were characterised by *unity and diversity*. There was agreement both among political elites and the general population in post-communist countries on the main objectives of the transition. Both essentially wished to follow Western models (Zapf 1996), but with differences in implementation and consequently in outcomes (Stark 1991). Furthermore, the goal of now making the countries that had escaped Soviet domination full members of the European Union was soon formulated and pursued.

*Capitalism, but different:* The transition to capitalism required the implementation of essentially identical steps in all countries. The means and institutional solutions to create an economy integrated by a market based on private property are well-known: free trade, market institutions, privatisation of state property, creation of capital markets, allowing foreign capital inflows, restructuring labour market regulation, and so on. Consequently, the necessary steps resulted in integration into the world economy. The transition to capitalism is also a period of intensifying globalisation, and affected all post-socialist countries largely at the same ways. Globalisation was spectacular in these consumer markets, with global producers and products – detergents such as *Persil*, Swiss watches and chocolate such as *Lindt*, hamburgers and pizza, *Coca-Cola*, IT products, and auto brands. etc. – rapidly becoming dominant

in all countries. Accession to the European Union has also pushed these countries towards the harmonisation of the institutions. Integration meant introducing the same rules regarding capital and labour market apply across countries.

However, the response to market universalism and globalisation and the resulting challenges has not always been uniform. In designing new institutional solutions, countries have followed different models and solutions proposed by the World Bank and other expert groups, and have introduced them at different speeds. We know that there is no single Western model – just think of the “varieties of capitalism” (Hall/Soskice 2001), different types of welfare states (Esping-Andersen 1990), or the diversity of education systems in Europe (Allmendinger/Leibfried 2003). Nor should we overlook the fact that the economies of socialist countries differed considerably in the way they functioned, their political freedoms, and the way their social systems were set up, resulting in path dependencies many years down the road. Although all countries developed capitalist economies integrated into the world market, there were and are differences. *Bohle and Greskovits (2019)* distinguish four new types of capitalism considering six dimensions, including the degree of European institutional integration, the degree of market institutionalisation, the degree of foreign direct investment, the way in which social integration has taken place, and labour market regulation. These are “neoliberal capitalism” dominated by the unrestricted free market (the Baltic countries), a socially “cushioned” “embedded neoliberal capitalism” (Czech Republic, Hungary), “corporatism” with room for social negotiation (Slovenia), and a “residual” category, which includes all other Central Eastern European (CEE) countries. Their categorisation is in perspective consistent with the results of the “varieties of capitalism” research programme established by *Hall and Soskice (2001)*, which distinguished between “liberal market economies” and “coordinated market economies.”

*Fundamental differences in the social care system, institutional arrangements:* In transition, there were significant differences in the restructuring of the social care system from the outset. The engineers of the economic transformations largely agreed on the need to reduce social expenditures, since the decline in economic performance had led to a sharp decline in the income available for redistribution and became too great a burden on the economy (“premature welfare state”). At the outset, there was a significant difference, for instance, in the dominance of means-testing services in the Baltic countries and Bismarckian (employment-related) services in the Visegrád countries. For example, the measurements of pro-natalist or parental-leave policies were also not the same: during maternity leave in Hungary, mothers were paid an earnings-related allowance, while in Poland they received a flat support rate based on an income test (*Matysiak/Szalma 2014*). More recently, a high universal family allowance was introduced in Poland to address the problem of low fertility, while in Hungary, tax credits linked to earning capacity are expected to improve productivity.

*Performance of economies, living conditions:* As a result of the transformation, the economic performance (GDP) of the Central Eastern European countries has improved and converged related to the average performance of pre-accession countries of the EU (*Campos et al. 2019*). The degree of convergence has of course

depended on the starting point and the speed of the transformation, but there is also a view that there has been little substantial convergence. Ordinary citizens experienced the consequences of the transition to capitalism through their income positions, employment uncertainty, and through how they could make ends meet given needs and consumer supply.

*Increasing income inequalities:* Furthermore, income inequalities have increased and societies have become polarised as a consequence of the transformation (Tóth 2014). The increase in inequality was particularly striking in the early 1990s; the real incomes of the vast majority of populations declined during the period of “transformational recession,” living conditions deteriorated, and there were few winners and many losers of the transformation to market capitalism (Rychard 1996). However, with the subsequent sharp rise in economic performance since the turn of the millennium, many people have been able to achieve advantageous social positions and high incomes. The Gini coefficient measuring income inequality stood between 0.20 and 0.25 in the CEE countries at the time of the transition to democracy; two decades later, due to the notable increase in inequality, especially in the Baltic countries, we find values between 0.23 and 0.37 (Tóth 2014). Three mechanisms played a crucial role in this regard. First, the strong differentiation at the labour market, the differentiation of earnings alongside skills and abilities and human resources invested (Heyns 2005). Second, the emergence of and increase of capital income due to privatisation. Third, changes in the extent (decline) and modalities of taxation and social redistribution have played a crucial role in the growth of inequality. Meanwhile, income inequality in Western European countries also rose significantly between 1990 and 2010 according to OECD data (OECD 2011). Changing and segmented labour market conditions caused by globalisation, technological progress, and the rise in capital income have played a decisive role in this rising trend. At the same time, there is a tendency for inequality in CEE countries to be lower on average than in Western Europe. Nonetheless, the CEE countries diverge in the ranking of inequality in the EU; while the Czech Republic has very low income inequality, Poland and Bulgaria have very high income inequality (OECD 2011; Blanchet *et al.* 2019).

*Fierce competition in the labour market:* Above all, the financial situation of households depends on the labour market position of its members and on social programmes. The transition radically changed labour market conditions from a labour-scarce, “full employment” over-demand market to a supply market with significant unemployment (Kornai 1992). The opening of commodity markets and the operation of free trade devalued the performance of the centralised formerly socialist economies almost overnight. Goods became unsaleable, necessitating cutbacks in factory output, a fall in real wages, and lay-offs. In short order, millions of jobs were lost and fierce competition for the remaining jobs began, continuing to this day. As a result, employment rates fell by double digits. Although employment in the socialist countries before the transition, especially among women, was higher than in Western countries, the decline in the period immediately after political transformation was reattained several decades later.

*Accumulated unmet demand and shrinking household resources:* No less striking was the change in consumption. In a state-owned “shortage economy” (Kornai 1980 1992) the consumption market was characterised by a constant shortage of goods in both quantity and quality. Therefore, active informal trade was very common among the inhabitants of the former socialist countries (Sik/Wallace 1999). During the socialist period, household incomes – while low – could not be spent and had to be accumulated. The oversupply of Western goods immediately after the transition, resulting from trade liberalisation, was able to meet the accumulated unmet demand, but quickly eroded the accumulated income. As a result of the contraction of the labour market, incomes fell or became highly differentiated, and although the supply market was untapped, financially backed demand diminished. Most households had no disposable income, which likely was a disappointment for many (Kornai 2006). Róbert (1999) in his seminal paper “*Greeting the Teeth*” summarised the origin of the basic disappointment as ordinary people received freedom, but expected Western levels of living from the regime change. Accordingly, life satisfaction declined in parallel with the economic downturn for many years (Easterlin 2009), taking a long time to increase once again after 2010 (Vecerník/Mysíková 2015).

*The persistence of ideas, beliefs and attitudes:* The importance of dominant ideas, beliefs and attitudes cannot be neglected in the interpretation of demographic trends (van de Kaa 1987; Reher 1998; Lesthaeghe/Surkyn 1988). The profound changes of the 1990s, including the gains in political and personal freedom and the desire to follow the Western life-style and economic model, suggested that attitudinal shifts towards individualisation and self-realisation were taking place. Some early studies pointed in this direction (Thornton/Philipov 2009), while others pointed towards the stability of attitudes and the immutability of certain core values (Schwartz et al. 2000). Recent analyses show that Westernised (post-material) values have only started to spread strongly among the Eastern countries in the last decade (Manea/Rabušić 2020). Comparing countries, strong differences between the former socialist countries remain (Harrison/Fitzgerald 2010; Lück/Hofäcker 2003; Manea/Rabušić 2020). Analyses of the European Values Study show that at the turn of the millennium there was a deep divide between the populations of Western and Eastern European countries in terms of their values (Hagenaars et al. 2003), concepts of social justice (Arts et al. 2003), and attitudes towards gender roles (Lück/Hofäcker 2003). Specificities of Western countries are mainly related to welfare regimes (Arts et al. 2003).

We know that profound changes took place in all components of population dynamics following the 1989/90 political transitions (Sobotka/Fürnkranz-Prskawetz 2020). Life expectancy in Eastern European countries has improved overall, but, with the exception of Eastern Germany, the difference to Western countries has not narrowed. Women’s age at first birth increased, and period fertility dropped. Marriage, divorce, and non-marital childbearing behaviour also changed, albeit to varying degrees in the different countries. A pressing research question early on during the transition concerned the conditions under which family-related behaviour in the former socialist countries would start following “Western” patterns.

**Tab. 1:** Overview of the articles in this special issue

Authors	Research Question(s)	Source(s)	Country(ies)	Period(s)
<i>Fertility and Partnership</i> Billingsley et al.	Whether and to what extent did the political-economic transition of 1989-91 have an immediate impact on family dynamics?	Generation and Gender Survey, Harmonised Histories	Eleven post-socialist countries	1970-2010
Zakharov	Have fertility patterns changed, and if so, how?	Vital statistics	Russia (and further countries in the appendix)	1990-2020
Makay	Has the change in paid parental leave regulations (and the experience of transition in Hungary) affected labour market entry after the birth of a child?	Generation and Gender Survey, childbearing and labour market activities data	Austria, France, Hungary	1960-2012
Spéder	Does population turnover or period change dominate attitudinal change, and do these changes support the assumptions of the Second Demographic Transition theory?	International Social Survey Program, waves 1988, 1994, 2002, 2012	Hungary	1988-2013
Kleinschrot	Are there correspondences and/or conflicts between specific social policy norms and personal attitudes?	German General Social Survey, 1982 (Germany); Women's study, 1984 (East Germany)	Federal Republic of Germany (West Germany) and German Democratic Republic (East Germany)	1980s
<i>Mortality and Health</i> Jasilionis et al.	Has there been a convergence in life expectancy between the former socialist countries and the EU-15?	Human mortality database (2022)  The Human Cause of Death Database (2022)  WHO(2022) Eurostat (2022)	Three Baltic countries (Estonia, Latvia, Lithuania);  four Central European countries (Czech Republic, Slovakia, Poland, Hungary); EU-15 countries	1960-2022  1980-2022  1990, 2004, 2017

**Tab. 1:** Continuation

Authors	Research Question(s)	Source(s)	Country(ies)	Period(s)
Sakkeus et al.	Can life-course circumstances explain the persistent health disadvantage of the elderly Eastern European populations?	SHARE wave 7, supplemented with information from wave 5	26 countries divided into 13 Eastern and 13 Western European countries	2017/2018
<i>Migration</i>				
Fihel and Kaczmarczyk	Do existing theories help us understand East/West migration flows?		Central and Eastern European countries	
Göler and Krišjāne	How can aspirations, choices and movements, as fundamental elements of an individual's resilience strategy, help to cope with permanent existential risk, constant harassment, socio-psychological stress or other threats?	Albania: qualitative semi-structured interviews of 34 companies and entrepreneurs	Albania	2006
		Albania: 40 biographical interviews of private returnees		2012
		Albania: 20 qualitative interviews of asylum seekers in Bamberg (Germany)		2016
		Latvia: online survey	Latvia	2016
Ślusarczyk	What strategies for shaping family practices helped to maintain relationships in the everyday lives of transnational families before and during the Covid-19 pandemic?	31 in-depth face-to-face interviews from the Transfam project	Poland	2013-2016
		Ten remote interviews from the "Care strategies during and after the pandemic" project		2021



Postponement that started and intensified after the political transition strongly pushed fertility to low levels, subsequently rebounded in the first decades of the 21<sup>st</sup> century, and now Western and Eastern Europe can no longer be sharply divided. Moreover, migration patterns within the EU were deeply influenced by the end of the Cold War and even more so by EU accession. In how far can we accurately describe population developments in the former Eastern European socialist countries as converging or diverging? Are they adapting to the West, or are they rather path dependent on their previous histories? Have the former socialist countries followed the same path since the early 1990s? Did Western European states adopt new norms and values (once) common in the East, and if so, to what extent? Have the changes of the last 35 years given us new concepts resulting from the rapid changes in the Eastern European reality, or are we simply trying to impose existing theories? The contributions in this volume cannot, of course, answer all these questions. However, we hope that the studies in this special issue will not only expand our knowledge of European and Central Eastern European differences, but also provide answers to these questions that can spark further research.

#### **4 Short summaries**

In the following, we summarise each article. When we issued the call for papers, we aimed for one overview article for each of the three demographic processes: partnership and fertility, mortality and health, and migration. For partnership and fertility, we provide our own brief overview of trends and theories, followed by the summaries of the in-depth studies. For the other two areas, we first present the overview articles on trends and theory, followed by the in-depth studies.

#### **Fertility and partnership – European convergence and increased diversity**

*Trends:* General and profound forces drove fertility developments following the post-socialist political transitions (Frejka/Sobotka 2008). These include the plunge to a low after the end of state socialism, and the overcrowding and stagnation of the Total Fertility Rate (TFR) around 1.4 at the turn of the millennium and thereafter the rise in the 2000s, although the rate of increase varied. Of course, if we look more closely at fertility trends using specific indicators, we also find substantial differences between post-communist countries (Billingsley/Duntava 2015) – just as there are differences between German-speaking countries, the Netherlands, and France in Western Europe. Overall, however, fertility behaviour in the post-communist countries is well in line with European trends, as TFRs currently appear to be stabilising in the range of 1.5 to 1.8 (Sobotka/Fürnkranz-Prskawetz 2020). Heterogeneity in partnership behaviour, such as the prevalence of singleness, cohabitation, marriage among young people, or in divorce rates, was widespread in the countries of Central and Eastern Europe then and now. However, Western European countries are also diverse in this respect (Perelli-Harris/Lyons-Amos 2015; Härkönen et al. 2020). Overall, this



suggests that there are multiple drivers at work in couple relationships, that their intensity may vary across countries, and that further research is needed until we identify the sources of uniformity and heterogeneity.

*Theories:* There are a number of competing, though often complementary, explanations for the changes in fertility behaviour and couple relationships in post-communist countries, which *Sobotka* (2011) insightfully summarises. What we add here is to distinguish between the application of ready-made theories and those inspired by the post-communist situation. Among the most popular explanations of the post-communist transformation are the classical theories, such as the economic or structuralist conceptions of fertility, which attribute the decline in fertility to the collapse of the economy (economic downturn, inflation, unemployment). The second demographic transition theory (SDT) and the theory of "developmental idealism" claim global validity and explain the shifts towards Western values that have been set in motion by regime change and were sweeping through countries. The rapid emergence of contraceptives and their widespread availability is covered by the approach of the "contraceptive revolution". The political transformations of the early 1990s led to the emergence of two further theoretical approaches, though they focus on different factors. First, the lowest-low fertility levels in southern and central-eastern Europe motivated the theory of "postponement transition," which attributes the emergence of low fertility to a diffusion process. Postponement is understood as a response to socio-economic uncertainty that spreads through learning and social feedback mechanisms (*Kohler et al.* 2002). Second, the concept of "social anomie" adapts the sociological theory of Émile Durkheim and Robert Merton to understand demographic processes, emphasising the different paces of changing of ideas on the one hand (slow) and structural relations on the other (rapid), which postpones irreversible decisions (*Phillipov* 2003). While we cannot cover these theories in any greater depth here, we nonetheless affirm that they remain present in current interpretations. Lastly, it is also worth considering *Frejka's* 2008 conclusion that the cause of the fertility decline in Central and Eastern Europe is the transition from state socialism to market capitalism. In other words, he sees the socio-economic transformation as the "root cause" of the demographic transition (*Frejka* 2008: 160).

*Studies:* The studies in this section add to an already diverse picture. *Billingsley*, *Härkönen* and *Hornung* examine changes in the risk of four key markers of family dynamics relative to the transition-intensive years and find that the political transition had the strongest effect on the birth of a second child and the least on the propensity to divorce. Comparing three European countries, *Makay* shows that the reform of paid parental leave has had limited and differential effects on the transition to the labour market after childbearing and on the reconciliation of work and family life. Both studies suggest that taking into account additional social circumstances would be beneficial for our analyses. *Zaharov* concludes that the shift in fertility patterns in Russia, mainly reflected in an increasing dispersion of the ultimate number of children (family size) and a slight decline in fertility levels, has continued despite population policy interventions. Two further studies focus on the ideational context of family formation. Comparing East and West Germany in the 1980s, *Kleinschrot* draws attention to the fact that in East Germany, under conditions

of full employment, with widespread access to day care, and in a period of dominant ideology of female emancipation, a significant minority still believed that full-time maternal employment could harm child development. Finally, in tracing the evolution of gender role expectations and attitudes towards the family in Hungary, *Spéder* points out that although population turnover indicates a spread of liberal attitudes, the growing support for traditional attitudes associated with individual (period) change indicates a re-familialisation. This runs counter to expectations based on theories of value change which propose that Western values will gain ground.

### **The Sensitivity of Family-Related Behaviors to Economic and Social Turbulence in Post-Socialist Countries, 1970-2010**

**Sunnee Billingsley, Juho Härkönen, Maria Hornung**

This study's research question is whether and how the transitions from dictatorship to democracy and from planned to market economy affected four key events in family dynamics: marriage, the birth of first and second children, and divorce. The study draws upon parallel event history analyses of individual data from eleven post-socialist countries over a period of 40 years. The dependent variable is the risk of a key event occurring, and the main explanatory factor is the calendar year. The set of control variables is necessarily narrow: educational attainment and time-varying school and university enrolment. The authors expected a significant effect of the 1989/90 transitions on all key events. The results of the analyses are surprising; heterogeneous patterns emerge both regarding key events and countries, and on the existence and timing of the effects. The transition had the largest effect on the risk of having a second child, namely by reducing it. The risk of becoming a parent was stable in the 1990s and barely different from the reference value (1980), and then fell in several countries in the 2000s. However, it also increased in some countries. The effects are even more differentiated in the case of markers of partnership behaviour. Against this background – as the authors point out – it would be a mistake to conclude that the 1990s transitions were not a powerful “juncture” that directly and indirectly induced shocks in family dynamics events, since many country analyses that include macro- and micro-level control variables clearly show significant changes in risks

### **Three Decades on Russia's Path of the Second Demographic Transition: How Patterns of Fertility are Changing Under an Unstable Demographic Policy**

**Sergei V. Zakharov**

Drawing on the arsenal of canonical demographic indicators and exploiting their properties, this study provides a comprehensive picture of the trends in Russian

fertility over the last half century, focusing on the time since 1989-91 and, within it, the period of pronatalist policies starting at 2007. It is instructive to present and interpret the period indicators and the completed fertility indicators and their modelled estimates in parallel, as *Sergei V. Zakharov* does, in order to get a picture of short- and long-term fertility movements. He assigns the increase in the total fertility rate between 1990 and 2015 to timing rather than quantum, i.e., the increase in completed fertility is minimal. There are only slight fluctuations in completed fertility; the downward trend is interrupted by the cohorts born in the 1980s, as their CFR has increased. The CTFR is expected to stabilise around 1.6-1.7. According to the modelling presented in the study, there has been a significant change in the ultimate number of children of cohorts 1955 and 1995 (forecasted). It is forecasted that childlessness doubling to 20 percent and about 20 percent of people will have three or more children. The share of one- and two-child families is estimated to be around 30 percent each. The article concludes that Russian fertility patterns are developing towards Western European trends, despite constantly changing social circumstances and policy reversals. The article is complemented by an extensive appendix that compares some of Russia's indicators with those of Western and post-Soviet countries.

## **Paid Parental Leave Reforms and Mothers' Employment in Austria, France and Hungary**

**Zsuzsanna Makay**

This study examines the reconciliation of work and family life in France, Austria, and Hungary from a rarely studied perspective: entering the labour market after having had children. More broadly, the study analyses the consequences of policy interventions, since its basic question is to examine the effects of policy changes regarding the length and eligibility of paid parental leave. Zsuzsanna Makay provides a comprehensive and detailed picture of institutional changes for the three countries under examination. Event history analysis is used to examine the timing and intensity of the return to work after childbirth, using country-specific policy periods as explanatory variables. There are significant differences in the return to the labour market in the three countries, with a very rapid return in France and a more protracted return in Austria and Hungary. Institutional changes have only had an impact in specific circumstances. In Austria, flexibility has allowed for earlier re-entry, while in Hungary the post-1989 transition was the key event making labour market entry more difficult. Overall, women in all three countries have not adapted at the same manner to changes in parental leave policies. This is probably due to differences in access to childcare and different national perceptions and norms about the duration of parental involvement in their children's development.

## **Gender Norms under Socialism and Capitalism: A Historical Examination of Attitudes towards Maternal Employment in the German Democratic Republic and the Federal Republic of Germany**

**Leonie Kleinschrot**

Going back to the period before the fall of the Berlin Wall, this article dusts off and analyses a East German dataset from 1984, lying dormant in a warehouse, and compares it with a West German welfare survey from the same period (1982). Acknowledging the limitations of the East German survey (coverage of certain regions, biased sample by gender, mode of completion), the parallel analysis of the two datasets seeks to understand the extent to which attitudes towards women's full-time employment were in line with the respective socio-political and institutional conditions of the period. In the GDR, the majority of survey respondents supported full-time employment if the mother had a young child. Conversely, in the FRG, almost the entire population agreed that "the child would suffer if the mother worked full-time." Although the comparability of the results is limited, the study illustrates a phenomenon that social researchers have often observed in Eastern Europe, but rarely been able to demonstrate empirically: There were contradictions between ideology, existing institutions, and private opinions about them. Namely, in the GDR, one-third of respondents did not support full-time employment for women with young children. It is also clear that the reconciliation of family responsibilities and work was a challenge not only in the capitalist economy, but also under state socialism, despite the widespread availability of childcare facilities. Furthermore, the full employment of women (driven by expansive industrial development) was probably an economic necessity for a significant minority, without denying its overall emancipatory role for women. The analysis also shows that in East Germany, there was congruity between preferences for work and support for women's full-time employment, while in West Germany, preferences for children and support for female employment clashed.

## **A Quarter-Century of Change in Family and Gender-Role Attitudes in Hungary**

**Zsolt Spéder**

Using data from the International Social Survey Programme, this article examines a salient aspect of social change; the nature of ideational change from 1988 to 2013. Gender role expectations, attitudes towards women's employment and its family consequences, and support for marriage and family life with children are the immediate ideational context for the decision to family formation. The research question is whether and to what extent attitudes towards gender roles changed alongside the transition to democracy in Hungary. It was a reasonable assumption that the transition from a soft dictatorship based on a one-party system to a new

political order based on freedom and choice would be accompanied by an increase in freedom and tolerance in all areas of life. The analysis is limited to a single country because pre- and post-transition measures of attitudes were only available for Hungary. The analysis is based on an arithmetic decomposition of trends into population turnover and individual (period) change. While population turnover has trended towards liberalisation throughout the quarter century, the period effects associated with different periods have fluctuated. During periods of intense economic and political change, attitudes shifted towards traditional ideas, after which most attitudes returned to pre-transition levels and then shifted dominantly, but not exclusively, towards liberal attitudes. As the period effects were stronger than the population turnover effects throughout the period, the latter dominated the changes the article identifies. In the author's view, the results contradict conceptual ideas that see the spread of Western values as the driving force behind changes in demographic behaviour during and after the end of the Cold War and the subsequent political transformations.

## **Mortality and health**

The mortality and health section consists of two complementary articles, the first by *Jasilionis et al.* asking whether there has been a convergence in life expectancy between the former socialist countries and the EU-15 and, if so, when it occurred – was it before or after the fall of the Berlin Wall, and was it accelerated by EU accession? Since social and economic convergence has always been an important dimension of European integration and EU enlargement, EU policies should be designed to help prospective and new member states catch up with EU living standards. The so-called beta convergence model assumes faster growth of initially poorer countries and regions, which allows them to eventually catch up with the richer countries and regions (*Forgó/Jevcak* 2015). However, as *Jasilionis et al.* point out, previous attempts to identify the process of long-term convergence across member states and regions after the enlargements of the EU (*Mackenbach* 2013; *Maynou et al.* 2015; *Hzic et al.* 2020, 2021) did not find evidence of beta convergence. The second article, by *Sakkeus et al.*, takes a different look at a similar question, namely why there is a health stagnation among older Eastern Europeans, who at the age of 65 spend more than two-thirds of their remaining life expectancy with health limitations, compared to half of the years for Western Europeans. Based on theories of life course epidemiology (*Ben-Shlomo/Kuh* 2002; *Dannefer* 2003; *Graham* 2002; *Wang/Kang* 2019), they examine the difference in the cumulative effects of life course factors on the health of Eastern and Western Europeans in three domains: self-rated health, disability and cognitive functioning. Most importantly, they address the question of the timing of these life course factors. This may help us understand if and how current health policies aimed at promoting convergence may be able to compensate for differences in the life experiences of Eastern and Western Europeans.

## **Is East-West Life Expectancy Gap Narrowing in the Enlarged European Union?**

**Domantas Jasilionis, France Meslé, Jacques Vallin**

This study explores the impact of two significant historical events – the fall of the Berlin Wall in 1990 and European Union (EU) enlargement in 2004 – on the political, socioeconomic, and health trajectories of Estonia, Latvia, Lithuania, the Czech Republic, Slovakia, Poland, and Hungary in comparison to EU-15 countries. It explores whether beta convergence took place after EU enlargement in 2004 in terms of life expectancy at birth, cardiovascular disease, and external causes of death. The study finds that the fall of the Berlin Wall and subsequent political and societal transformations had positive effects on life expectancy in four Central European countries, narrowing the longevity gap with the EU-15. In contrast, the three Baltic countries experienced a socioeconomic crisis leading to a decline in life expectancy in the mid-1990s, with recovery occurring in the late 1990s. However, they maintained a significant life expectancy disadvantage compared to the EU-15 for another decade. The findings emphasise that health improvements in the new EU member states began before 2004 and were influenced by factors such as legal and administrative reforms. Economic assistance from EU structural funds and programs indirectly contributed to population health improvements, particularly in health care infrastructure and road safety. Despite economic convergence, the study raises concerns about social and health disparities among the seven countries. Lithuania and Latvia, while achieving rapid GDP progress, still face challenges in social indicators. The study concludes that ongoing efforts are required to address cardiovascular diseases and external causes of death, especially in lagging countries, to achieve substantial progress in life expectancy convergence with the EU-15. The impact of external factors such as the COVID-19 pandemic and geopolitical threats on future health conditions in the region adds uncertainties, showing the need for better monitoring and strengthening of health care and social systems.

## **Life-course Factors and Later Life Health in Eastern and Western Europe**

**Luule Sakkeus, Katrin Schwanitz, Liili Abuladze, Uku Rudissaar**

Using data from the 7th wave of SHARE, this study examines health outcomes in later life for Eastern and Western European respondents, focusing on self-rated health, disability and cognitive functioning. The authors examine several cumulative life course factors, emphasising the impact of disadvantaged socio-economic position on health outcomes. The findings suggest that Eastern Europeans experienced more negative life events than Western Europeans and that the persistence of disadvantage throughout life was associated with adverse health outcomes in later life. Disadvantaged socioeconomic positions, hunger and discrimination against parents were the key factors contributing to significantly worse health outcomes.

Most interestingly, however, a disadvantaged socioeconomic position in adulthood was more strongly associated with health outcomes than childhood position.

A novel aspect of the study is the observation of cognitive functioning across a large number of European countries, showing better performance in Eastern Europe, especially in delayed recall. At the same time, Eastern Europeans experienced worse health in terms of self-rated health and disability. *Sakkeus et al.* suggest that in Eastern Europe, due to past repression and conflict, mortality selection is still strong, so that fewer people with poor cognition survive to older ages than in Western Europe, where mortality is generally lower. Another important aspect to explain the cognition advantage may be the subjective nature of the measures of self-rated health and disability used in the study, as opposed to the more objective cognitive measure. Eastern Europeans may underestimate their physical health.

## Migration

The migration section consists of three articles. The first, by *Fihel* and *Kaczmarczyk*, provides a theoretical foundation for the following two in-depth studies on international solidarity in the context of migration in Poland (*Ślusarczyk*), and on migration as a tool of social resilience in the diverse contexts of Latvia and Albania (*Göler/Krišjāne*). *Fihel* and *Kaczmarczyk* suggest considering the aspirations/capabilities approach as an overarching conceptual framework for interpreting post-2004 migration (*Czaika/Vothknecht* 2014; *Haas* 2021). The two in-depth studies, relying heavily on qualitative research and mixed-methods approaches, reflect the diversity of migration strategies and tactics. In doing so, they support the conclusion by *Fihel* and *Kaczmarczyk* that migration processes cannot be easily explained and interpreted with reference to only one theoretical approach, such as the widely used neoclassical economic theory of income and living-standard disparities (*Smith* 1776, 2000; *Hicks* 1932; *van den Berg/Bodvarsson* 2009). Both the structural determinants of migration and individual decisions need to be taken into account when exploring the complexity of recent migration flows from Central and Eastern European countries.

## Emigration From Post-Communist Central Europe After 1989 Interpreted Within the Aspirations/Capabilities Framework

### Agnieszka Fihel, Paweł Kaczmarczyk

In this article, the authors explore the determinants of mobility and emigration from the EU-11 countries since 1989, i.e., the Eastern European enlargement countries. They pose eleven theory-driven questions and review answers in existing empirical studies. The research reveals that wage differentials remain a significant factor for intra-EU labour mobility, but their impact is influenced by labour market imbalances, occupational mismatches, and unemployment levels in sending countries. Additionally, traditions of labour mobility and the emerging migration



industry shape migration patterns. The study emphasises that while socio-economic disparities in countries of origin do not necessarily affect the willingness to migrate, the aspirations/capabilities approach, which considers structural determinants and individual decisions, provides a comprehensive framework for understanding migration complexity. The paper highlights the evolving nature of migration from Central and Eastern Europe, pointing out that the structure and patterns in the early 2020s differ significantly from those around the time of EU enlargement. The authors suggest that the aspirations/capabilities framework remains relevant, but that specific circumstances such as the post-communist transition and geopolitical changes play a crucial role in increasing the propensity to migrate. The study acknowledges the limitations of not conducting a dedicated empirical analysis and calls for further research to explore the evolving dynamics of migration, especially in the context of the shift from emigration to immigration in Central and Eastern European countries.

## **Intergenerational Solidarity Revisited: Migrant Families in the Dilemma of Providing Family or Elderly Care in the Context of the Covid-19 Pandemic and its Challenges**

**Magdalena Ślusarczyk**

This study employs qualitative and exploratory research methods to investigate the impact of the COVID-19 pandemic on the strategies of family and elderly care among Polish transnational migrants. The study finds that while migration is fundamentally accepted in Poland, there is a preference for family support through migrants and a strong tendency to avoid institutionalised elderly care. Based on interviews conducted both before and during the pandemic, the findings indicate that migrants' care intentions for their own elderly dependents have not fundamentally shifted, despite some temporary adjustments in strategies. The study identifies three key factors that influence the reluctance to redefine care strategies. First, the perception of time is crucial, as initial expectations of a short-term challenge evolved into an extended and uncertain period due to ongoing pandemic developments. Second, proximity to destination countries, lower migration costs, and living within the European Union or Schengen countries contributed to a sustained belief in maintaining current visiting patterns, even with additional testing or quarantine measures. Finally, the belief in the effectiveness of communication technologies, such as mobile phones and the Internet, in facilitating remote care strategies remains strong. This belief has been further reinforced during the pandemic. According to Ślusarczyk, "intentional unpredictability," i.e., not ruling out any mobility outcome (staying, returning, or migrating to another country), is a dominant strategy among Polish migrants. This strategy allows for flexibility in adapting to changing conditions without abandoning the migration project.

## Migration as a Tool for Social Resilience: Lessons From Two Case Studies

**Daniel Göler, Zaiga Krišjāne**

The study examines the dynamics of emigration from Latvia and Albania over the past three decades, focusing on the role of migration as a strategy for social resilience. Social resilience is defined by the authors as “a strategy for solving an individual or collective problem.” From this perspective, migration is the response of individuals to personal threats and/or socio-economic instability, the latter of which has been widespread in both countries in recent decades. Emigration has historically been a popular choice for Latvians, especially during economic crises, casting migration as an immediate solution and a tool for social resilience. Similarly, the Albanian experience reflects a revival of emigration as a means of social resilience during the post-communist transition crisis. The Albanian case is different because of historical factors – including isolation during socialism – which led to spontaneous and chaotic migratory movements in the 1990s. In addition, the unresolved question of EU accession has limited freedom of movement and access to labour markets, making Albanian migrants vulnerable. The article explores the concept of social resilience, viewing migrants as agents of social change who adopt social practices from different economic, social, and cultural contexts that then also become embedded in the societies of origin and destination. *Göler and Krišjāne’s* findings suggest that unidirectional or repeated migration with shorter episodes may be a tailor-made solution for social resilience in the short term.

### 5 Discussion and remaining questions

The articles in this special issue provide some answers to the four questions we posed at the beginning. We will start by covering the first two.

1. In how far can we accurately describe population developments in the former Eastern European socialist countries as converging or diverging? Are they adapting to the West, or are they rather path dependent on their previous histories?
2. Have the former socialist countries followed the same path since the early 1990s?

*On convergence and path dependencies:* The question of European convergence versus divergence, or perhaps the persistence of differences (i.e., path dependency), has been a constant focus of interest, and was of interest to the editors in formulating the call for a special issue as well. The articles published here shed some light on these questions, even though some may deal with very specific and focused topics. We also publish our assumptions and conclusions, synthesising the knowledge we have gained.

As far as fertility behaviour is concerned, we propose that countries have converged, but that differences in nuptiality are more likely to persist. Contrary to the fertility bifurcation thesis that emerged a decade ago, Western European countries are now closer to each other in terms of fertility levels than they were thirty years ago, and post-communist countries also seem to fall into the range between low and lowest-low fertility. We assume that the main drivers towards similarity are the increase in childlessness, the stagnation of fertility at parity three and above, and the increasing dominance of the two-earner family model. In this case, we should not speak of "catching up" with Western Europe, but of the emergence of a common European pattern. However, differences between the CEE countries remain, but from a distance they seem to have followed a very similar path. Nonetheless, the question remains whether very different welfare regimes and very different capitalisms really allow for the emergence of converging fertility behaviour.

At the same time, we should stress the fact that there are significant regional (territorial and urban-rural) and social status (educational attainment, migrants and ethnic minorities) differences within each country. Within Europe, differences in marital status (singlehood, cohabitation, marriage; separation and divorce) are more pronounced.

In terms of health and mortality, there seems to be a similar path for certain causes of death, such as external causes, and this path is converging towards the West. However, even more importantly, there seems to be a strong path dependency, especially for cardiovascular disease mortality, as well as for self-rated health, disability and cognitive function, which has led to very different health and mortality trends between the former socialist countries. A strong legacy of the past, with periods of crisis and stagnation, has led to very uneven starting conditions for the transformation process, and their repercussions for health and mortality continue to this day. This was exacerbated by country differences in the transition to capitalism, with intense competition in the labour market and shrinking household resources, differences in the health care system and differences in the adoption of healthy lifestyles. Overall, this seems to have prevented convergence towards Western levels of health and mortality and has also led to divergence within the former socialist countries, with clear leaders and laggards. This leads us to conclude that we need to abandon the idea that living together under a large political umbrella such as the European Union will automatically lead to faster growth in health and life expectancy in initially poorer countries and regions, allowing them to eventually catch up with the richer countries and regions. A more nuanced understanding of the complex interrelationship between life course factors influencing health and mortality is needed for both Eastern and Western European states.

In terms of migration, the political decision to open the borders in 1989/90 led to an immediate and steady increase in emigration from the former socialist countries. Accession to the European Union was another milestone; emigration to countries with a higher standard of living in the EU accelerated. The post-communist countries all became net emigration countries, but the degree of migration imbalances varied considerably between them. Although this requires further study, post-communist countries have recently started to become attractive destinations for non-European

migrants, mainly due to rising incomes and the loss of the labour force as a result of migration.

*Lessons learned:* The question of convergence versus divergence requires comparisons across many countries (*Billingsley et al., Jasolinie et al.*). However, we frequently find that such comparisons across Europe are necessarily limited in their use of indicators of exogenous factors (such as the economic, political, and social environment). Alternatively, some of the studies in this volume (*Göler and Krišjāne, Makay*) also shed light on the fact that a selection of a few societies and a closer examination of their specific circumstances can provide additional insights into the drivers of demographic behaviour. This also presupposes that country studies will continue to be essential for understanding family behaviour (*Kleinschrot, Sluzarczyk, Spéder*). In addition, we believe that qualitative and mixed methods studies (*Göler and Krišjāne, Sluzarczyk*) provide valuable insights, especially for less studied countries and topics. Finally, we believe it is of the utmost importance that the voices of researchers who have actually experienced all facets of the transformation processes are heard, not only in describing the phenomenon, but also in developing new theoretical concepts.

3. Did Western European states adopt new norms and values (once) common in the East, and if so, to what extent?

*An open question:* We also asked the rarely discussed, perhaps strange-sounding question above when we made the call. The reason, to put it very simply, was to bracket the idea of universal development, if only for a while. However, there was also a developmental fact rarely discussed explicitly: Female employment in the socialist countries had been higher for decades, and the corresponding two-earner family model more widespread, than in Western countries. It was assumed that at a time when female labour force participation and the two-earner family model were steadily increasing in Western Europe, the attitudes towards gender roles prevailing in the post-communist countries might be "attractive" to the Western population. There is evidence that generational change is leading to similar shifts in Western and Eastern European countries, but there is also evidence that differences remain. We would therefore like to rephrase the question slightly and ask whether new norms and values have emerged in both Western and Eastern Europe and whether both regions are converging towards them. The articles in this special issue do not provide an answer to this question, but it may be worthwhile to take it up in future research.

4. Have the changes of the last 35 years given us new concepts resulting from the rapid changes in the Eastern European reality, or are we simply trying to impose existing theories?

*On demographic concepts:* From the point of view of the progress of science, it is perhaps interesting to ask whether the thorough examination of a new social reality and profound economic and social transformation has made it possible to develop new approaches and concepts, or whether it has primarily meant testing

and adapting existing theoretical approaches. New interpretations have emerged (cf. the postponement transition, social anomie, neurodegeneration, and survival among the oldest-old), but we see that the prevailing approaches in demography, namely the economic view, the second demographic transition, beta convergence, mortality rectangularisation, compression versus expansion of morbidity, the dual labour market, etc. remain dominant. (An example of the extent to which existing theories can be applied to Eastern European processes is the *Fihel/Katzmrczyk* study in this volume). This is useful, because new concepts, if they are relevant, should be able to break through. Nevertheless, before abandoning them, it would have been worthwhile to examine these emerging concepts more closely, as they might have provided impulses for refining the dominant paradigms.

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Birgit Glorius (Chemnitz)  
Fanny Janssen (Groningen)  
Frank Kalter (Mannheim)  
Stefanie Kley (Hamburg)  
Bernhard Köppen (Koblenz)  
Anne-Kristin Kuhnt (Rostock)  
Hill Kulu (St Andrews)  
Nadja Milewski (Wiesbaden)  
Thorsten Schneider (Leipzig)  
Tomas Sobotka (Vienna)  
Jeroen J. A. Spijker (Barcelona)  
Helga de Valk (The Hague)  
Sergi Vidal (Barcelona)  
Michael Wagner (Cologne)