Issue No. 25 (March 2023)

Inequality Matters

Quarterly updates on inequality research, LIS micro data releases, and other developments at LIS

MESSAGE FROM THE EDITOR

Dear readers,

Exciting news about Luxembourg! Our data team completed the work on annualising the Luxembourgish data. LIS Database users can now analyse a data series of 35 consecutive years from 1985 to 2019. We also extended the availability of additional annual/biennial datapoints for Canada (1971 to 1995) and annualised the Spanish ECHP and SILC series for the LIS Database (time periods 1993 to 2000 and 2004 to 2019).

We are looking forward to further applications to our annual LIS Summer Workshop, this year coinciding with a short conference devoted to the 40th anniversary of LIS. Also, we are inviting you to submit full papers / extended abstracts to our upcoming, together with the Gdansk University of Technology, jointly organised conference in late September. Please find more information about the upcoming LIS events in the 'News, Events and Updates' section.

Inequality matters! Our research articles look at inequality dimensions from various angles. The first article in this issue by Juan Cruz Ferre (The Graduate Center, CUNY) sheds light on the varying welfare policy approaches in Latin America in the first two decades of the 21st century. The work shows that it is essential to understand the history of social security in Latin America to analyse the success in inequality reduction, as well as the persistence of inequality in this region.

A new book by Rosa Mulè and Roberto Rizza seeks to offer re-interpretation of labour market policy regimes from a gender perspective. Drawing on the Luxembourg Income Study (LIS) datasets, the book studies gender inequality trends before and after the global financial crisis across eight high-income countries. Rosa Mulè (University of Bologna) provides an overview about the main findings of the book.

The third article by Petra Sauer (LISER / LIS / INEQ) and Ulrike Schwabe (DZHW, Hanover) argues that heterogeneity within the tertiary level became increasingly relevant to explain societal outcomes such as employment opportunities, income inequality and social mobility. Exemplified with the case of Germany, this article gives some hints how in the LIS databases international and national classifications can be used for cross-national research with respect to coping with the diversity of tertiary degrees.

Enjoy reading! Jörg Neugschwender

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Persistent segmentation in social policy in 21st century Latin America

Juan Cruz Ferre ✉, (The Graduate Center, City University of New York (CUNY))

(based on Ferre, J. C. (2022). Social policy expansion and segmentation in the first two decades of the 21st century in Latin America. *International Journal of Social Welfare*, 1– 20. https://doi.org/10.1111/ijsw.12579 .)

The expansion of social policy to outsiders in Latin American countries since the turn of the century has received a lot of attention from scholars and commentators. In this article, I highlight an equally important trend: the persistence or even increase in segmentation.

Introduction

The initial development of welfare policies in Latin America took place in the mid-twentieth century for a handful of "pioneer" countries following a conservative/corporatist model that linked benefits to employment. These Bismarckian foundations remain in place today, despite liberalization and privatization policies implemented during the 1980s and 1990s.

In the late 1990s and early 2000s, a wave of mass protests severely questioned the legitimacy of political regimes across South America and paved the way for a round of left or center-left governments–the so-called *Pink Tide*. Mass protests toppled governments in Argentina, Bolivia and Ecuador, and the widespread discontent with pro-market policies was felt across the region. Following this *crisis of legitimacy*, under strong popular pressure and benefiting from an extraordinary economic growth, pink tide governments implemented policies to address some of the most urgent social needs.

The expansion, however, was not exclusive of left-leaning governments. Most countries in Latin America improved their social protection systems, increasing coverage in different areas, such as transfers and healthcare. Conditional cash transfers (CCTs) were one of the principal policy tools governments used to provide economic relief to poor families. So-called non-contributory old-age pensions (NCPs) also expanded in many countries, substantially increasing the rate of people over retirement age receiving a modest, yet steady income.

The inclusion of previously excluded populations by new social policies implemented in the region has been widely documented. However, despite an emerging literature on the segmentation that these policies have also produced, this aspect has been much less studied.

Following Martinez Franzoni and Sánchez-Ancochea (2018), I use *segmentation* to describe the situation where "a significant amount of people are not sufficiently protected from market forces in a particular social policy realm … or when this protection is uneven among different groups". Segmentation can be the result of a dual social policy regime, as in the *liberal* welfare regimes, where there is a private, high-quality service for those who can afford it, and a public, low-quality one for those who cannot. Segmentation can also be a consequence of stratification in many layers, as is common in *corporatist-conservative* (or Bismarckian, Christian-democratic) welfare regimes. We find both of these mechanisms (from the liberal and the corporatist policy designs) in Latin American countries, but I will focus here on the segmentation caused by the growth of the private provision in the past two decades.

The growth of the private sector, whether in healthcare or education, undermines any progress toward universalism. When higher- and middle-income people seek health or education in the private sector, it means public services are not good enough for them, whether it is because there are long waitlists or because it is of low quality. When higher- and middle-income people seek health or education in the private sector, the support for funding the public sector: these families no longer have a stake in improving it (Huber & Stephens, 2012, p. 43). Conversely, when access to healthcare is limited, or when quality depends on formal employment or the ability to pay, the quality of someone's job, or their income, segmentation across different groups increases.

For this study, I collected data for the period 2000-2020 for 17 Latin American countries from a variety of sources[1] to assess the evolution of social policy in four policy areas.

Results

Transfers

Conditional cash transfers (CCTs) have been one of Latin American governments' favorite tools to provide relief to families in poverty and partially address income inequalities. CCTs are cash transfers to households living in poverty that meet certain criteria (usually, individuals must have children and be unemployed). Non-contributory old-age pensions have also spread significantly in the region, allowing millions of people in retirement age to have an income.

However, this expansion of coverage did not necessarily bring in the new beneficiaries to the already existing social policy schemes. Instead, the informal working class and the poor rural sectors were largely placed into a separate social protection network. In terms used by Armando Barrientos, in most cases they were not incorporated "horizontally," into the already existing *social insurance* plans covering formal workers, but instead, "vertically", into a separate layer of *social assistance* programs for the poor (Barrientos, 2019).

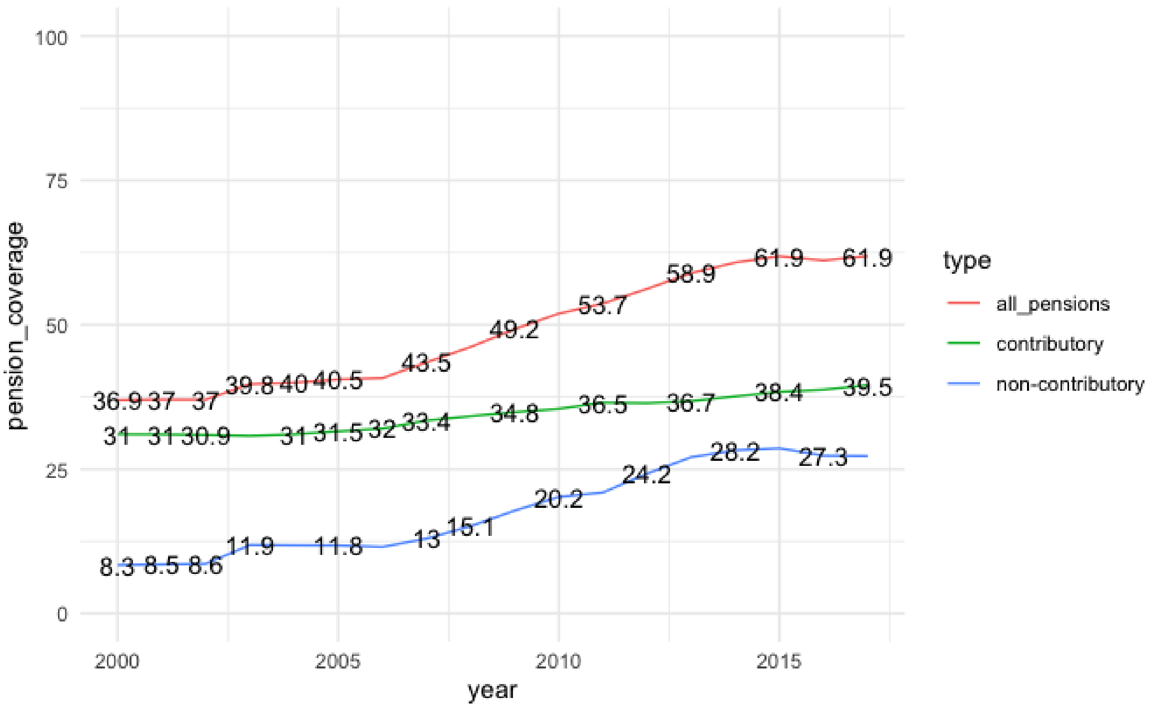
The number of CCT beneficiaries for the 17 countries analyzed in this study peaked at 160 million in 2014 and declined drastically after 2017. Similarly, by the mid-2010s close to 30 percent of the elderly were covered by non-contributory pensions (NCPs) (Arenas de Mesa, 2019). Non-contributory pensions are pensions for people above retirement age who are living in poverty and/or do not qualify for a contributory pension benefit.

As seen in Figure 1, inclusion rate among people above retirement age increased on average 25 percentage points between 2000 and 2019. While NCPs increased 19 percentage points in this period, the increase in beneficiaries of contributory pensions is much less pronounced, augmenting 8.5 points. This increase is less surprising if we consider that a growth of contributory pension beneficiaries is an expected trend accompanying the strong economic growth that started in 2002-2003.

In any case, the increase in the proportion of retired population receiving a pension is impressive. In contrast, the coverage rate for contributory pensions among working people has seen a significant but more modest, and uneven, increase. Argentina, Bolivia, Brazil, Colombia, Ecuador and Uruguay achieved important gains between

Figure 1. Percentage of the population over retirement age receiving a pension

Unweighted average for 17 selected countries. 2000-2017



Source: data from Arenas de Mesa (2019).

2002 and 2017, but other countries made modest progress or virtually none (such the cases of Guatemala and Honduras).

The divergence between the rapid increase in the–for the most part newly created–non-contributory pensions and the relatively more modest and uneven increase in the contributory pensions' schemes points to the emergence of two distinct retirement pension systems. Because NCPs provide a lower benefit amount than contributory pensions (see Table 1), the result is an increase in segmentation.

The number of people contributing to private pension funds (as percentage of the economically active population, EAP) continued to grow in most countries since 2000. All private pension schemes in Latin America are fully funded, defined-contribution, individual-capitalization systems. An increased weight of private pensions thus means greater segmentation, since individual capitalization accounts exacerbate the inequalities generated by the labor market. Argentina and Bolivia are two exceptions to this trend: both countries nationalized private pensions in 2008.

The expansion has come hand in hand with an increase in fragmentation. Across the board, a two-tier (or even a three-tier) pension system emerges, where social-assistance type, non-contributory pension programs are *added* to the already existing

Table 1. NCP benefit as percentage of average contributory pension benefit

Country	*NCP benefit as % of cont. pension benefit*
Argentina	77
Bolivia	8
Brazil	34
Chile	40
Colombia	4
Costa Rica	67
Ecuador	6
El Salvador	15
Mexico	16
Panama	25
Paraguay	27
Peru	14
Uruguay	57
Guatemala	58

Source: data from (Rofman et al., 2015)

pension schemes based on social-insurance schemes, mandatory private pensions, or both. Kathleen Thelen has described coined the term “layering” to describe this policy strategy (Thelen, 2009). At the same time, the creation and expansion of two important means-tested transfer programs (NCP and CCT) implies an increase in social spending in the form of targeted social assistance, a feature that has been described as typical of liberal welfare regimes (Esping-Andersen, 1990).

Eduardo Gudynas has theorized the expansion in social assistance in this period as “compensatory” policies to buffer the negative consequences of capitalism and enhanced extractivism in the region. Taking as a point of departure the increased reliance on extractivism common to most countries in South America at the turn of the century, he proposes that “progressive governments” have protected and supported the dynamics of capitalism, promoted accumulation, and accepted the global governance of international trade. What made them different from the pro-market governments of the previous decades is that they enabled the state to capture some of the surplus and use it to “reduce some negative effects through the use of social assistance programs.” For this reason, he gives them the name of “compensatory state” (Gudynas, 2016).

Health and education

The trends in healthcare and education have been, on a superficial level, positive for the region. The number of school-aged-children enrolled in primary school remains close to 100 percent in most countries and drop-out rates fell across the board. Enrollment in secondary school increased.

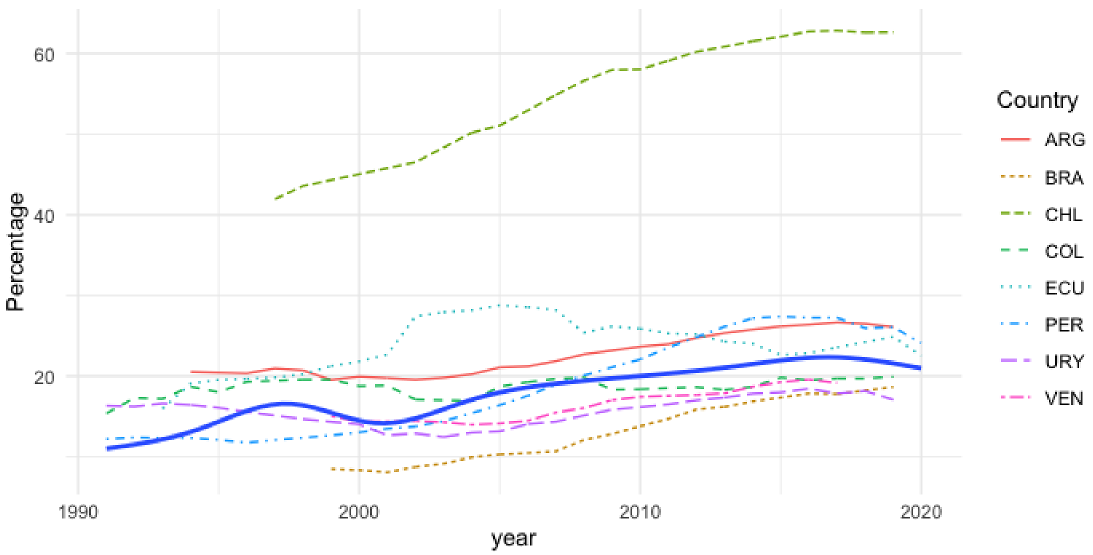
However, when we take a closer look, a more sober picture appears. In many cases, there are signs of “policy drift” affecting these areas—i.e., increased demand is not met with the corresponding increment in government funding and resources, leading to deficits or low quality of services. As Figure 2 shows for primary school alone, the overall trend in the region has been that of a growing weight of the private sector. Chile stands out as a complete outlier, with levels of privatization roughly twice as high as the second highest. And even though the percentage of primary-school-aged children enrolled in private school is already above 40 percent in the year 2000, the figure increases steadily to reach above 60 percent in 2019. Argentina, Peru and Ecuador also show levels of primary school privatization above the average.

The healthcare sector in Latin America has been historically fragmented in three subsectors: a tax-financed public subsystem, a social insurance sector financed through payroll contributions (linked to formal employment), and individually-acquired private health insurance (Cotlear et al., 2015), and there has been little to no change to these fragmented structures since the turn of the century. WHO’s Universal Health Coverage indicator shows a sustained increase for all countries in this studied period. Similarly, public health spending has increased steadily in USD (a sign of both the economic growth in the region and the secular trend toward higher costs particular to the health sector) across the board, but there is wide variability among countries. Venezuela is the only exception, with declining spending when measured in USD in 2012 and 2017, probably as a consequence of the deep economic crisis in this country.

Public health spending as percentage of GDP increased in most countries, but there are some exceptions (Guatemala, Honduras, Panama and Venezuela) where the figure remained constant or decreased, and some countries where the increase has been relatively small (Peru, El Salvador and Costa Rica).[2] (see Figure 3).

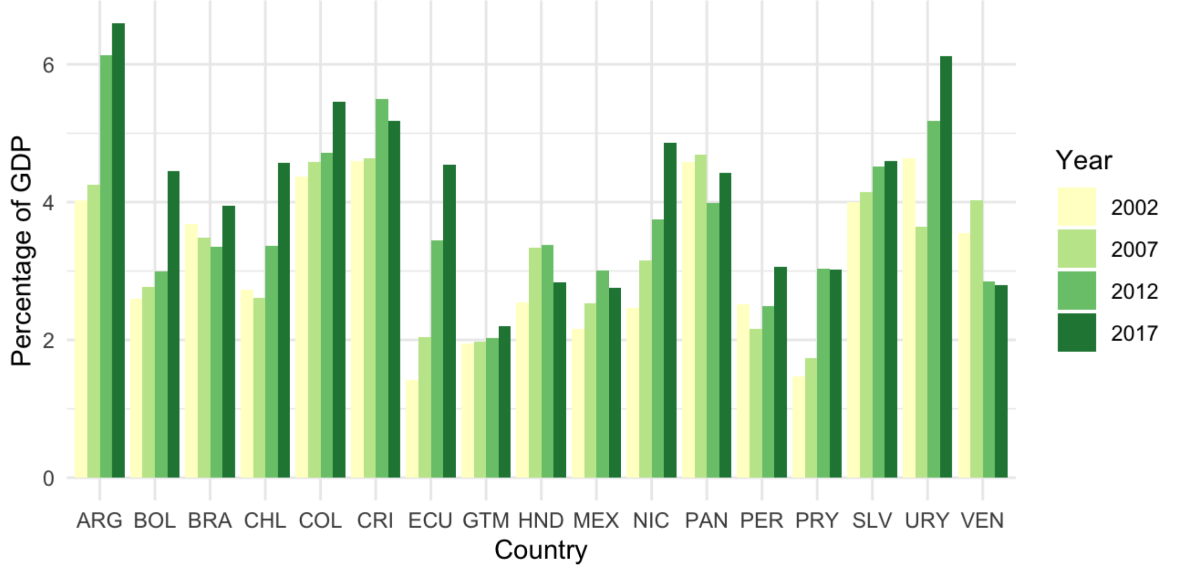
For an accurate analysis of the level of segmentation in healthcare, we would need a reliable indicator of healthcare quality across different sectors of the population. But there is no such data available for most countries in the region. Indirect measures of commodification in healthcare can shed some light on this contested terrain. In almost all countries in the region for which data are available, out-of-pocket spending as a percentage of total health expenditure *decreased*. The same is true for private spending as percentage of current health spending. On the other hand, absolute levels of private spending and out-of-pocket spending *increased* (Figure 4).

Figure 2. Enrollment in private education for primary school, Latin America 1990-2020, selected countries



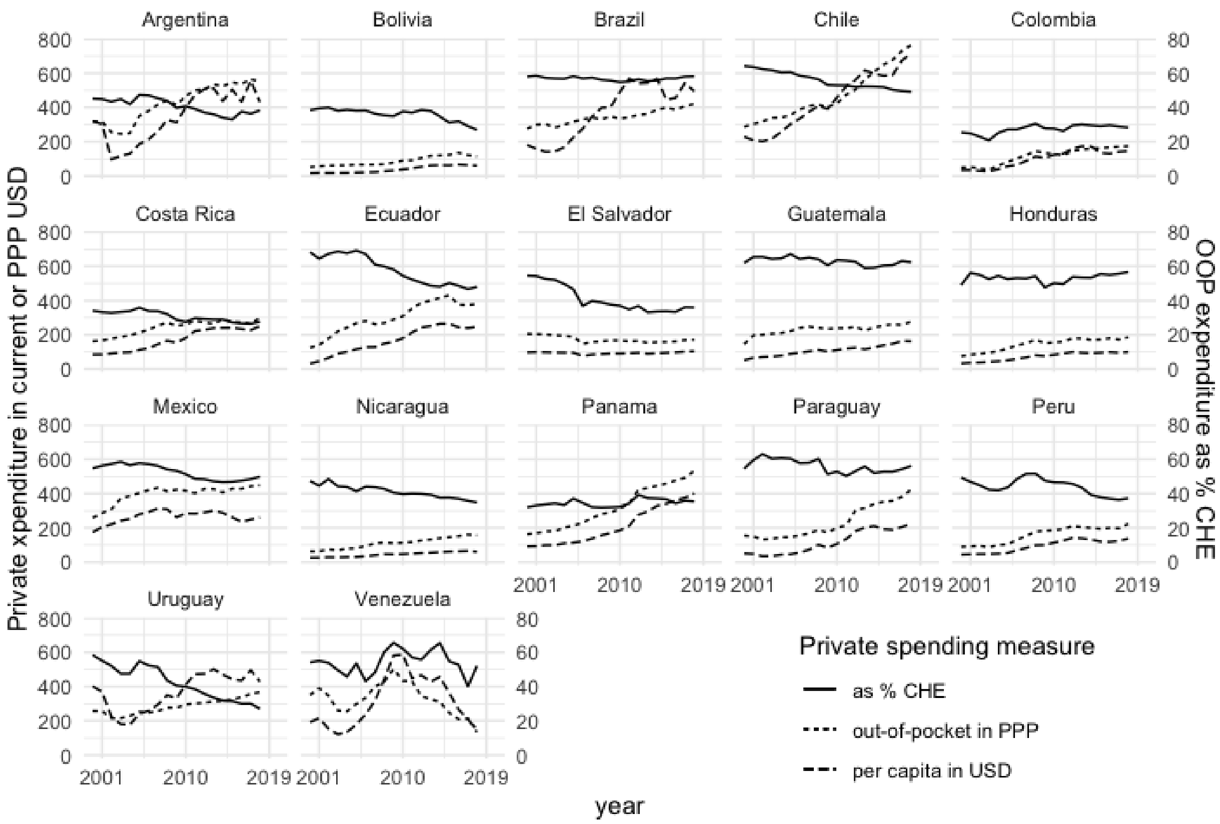
Source: World Bank. Thick blue line represents the unweighted average.

Figure 3. Public health spending as percentage of the GDP



Source: World Bank.

Figure 4. Three indicators of private health spending for 17 countries, 2000-2019



Source: World Bank. CHE: Current Health Expenditure

This combination of a declining private spending as percentage of current spending, and an upward trend of indicators measuring roughly the amount of money spent in private health per capita reflects that: (1) there is an overall increase in public spending in health, which is, in proportion, larger than the increase in total health spending; and (2) the increase in public spending on health is not large enough to offset the absolute increase in private health spending–put differently, the additional public spending is smaller, in absolute terms, than the increase in total spending.

Conclusions

There has been an important expansion in social policy to cover previously excluded sectors of the population. Although an increase in contributory and publicly-provided policies is observed, the predominant development is the rollout of new social assistance, targeted monetary programs (CCTs and NCPs).

Along with this, we observe an increased reliance on the market for the allocation and delivery of social services. The findings in this study show growing privatization of health and education, a tendency that nonetheless coexists with an increase in public health expenditure and an improvement in overall indicators for both health and education. Private pension funds increased in all countries except for the notable cases of Argentina and Bolivia, where mandatory private pension funds were nationalized. These trends reflect an increase in segmentation due to a higher dominance of market mechanisms for the distribution of social benefits.

Importantly, the fragmentation of social policy in areas like healthcare and pensions remains untouched. This fragmentation not only undermines the possibility of delivering equitable social services and benefits in the present moment, but it also precludes progress toward universalism in the long run. The addition of separate welfare schemes directed to specific groups of the population represents an obstacle in the path toward unification and equalization of benefits in the future.

The findings in this paper give support to Gudynas's proposal of a compensatory state. This framework implies that the government did not obstruct the expansion of the market, and even encouraged capital investment, but only appropriated part of the surplus to fund social assistance programs to compensate for the unwanted effects of market penetration and increase extractivism. If the region has a chance at breaking the dependency on the sale of natural resources, the dual nature of welfare, and the high rates of exclusion, it will be through universalist policies, which will not only address many of these problems, but also strengthen working-class constituencies to defend their social rights and fight for more.

1 The Economic Commission for Latin America and the Caribbean (ECLAC, 2021), World Development Indicators (World Bank, 2021), Arenas de Mesa (2019), Rofman et al. (2015), Boletín AIOS Estadístico AIOS (AIOSFP, 2021), and UNESCO (UIS, 2020).

2 I use the World Bank indicator "Domestic general government health expenditure (% of GDP)"

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Varieties of gendered inequality outcomes

Rosa Mulè, (University of Bologna)

Introduction

Historically labour policy trends and comparative data have revealed significant cross-country differences in gendered political economies in industrialised countries. Nevertheless, the dearth of research into gendered labour market policies as a separate field of study tasked with investigating the effects these policies have on gender inequalities is somewhat surprising. Comparative research on gender inequality trends, and most notably on 'within' gender inequality', has received less attention than gender labour market outcomes, such as employment rates, which alone cannot reveal the standard of living of working women. Little effort has been made to detect how different labour market regimes affect gender inequality, particularly during macroeconomic shocks and instability, such as the global financial crisis. The gender effects of the global financial crisis of 2008 in advanced economies remain significantly underexplored, though the consequences of gender inequality are likely to remain for many years. Were declining gender wage gaps paralleled by growing inequality among women, similar to what happened among men? Did certain women subgroups shoulder the cost of economic recession more than other groups? These questions are important, albeit rarely asked.

A new book offers a re-interpretation of labour market policy regimes from a gender perspective (Mulè and Rizza 2023). The study investigates the USA and the UK, as cases of the gendered liberal deregulation regime, Norway and Denmark as countries representative of the gendered learnfare flexibilization regime, Germany and the Netherlands with regard to the gendered sectoral dualization regime, and Italy and Spain as examples of the gendered stratified dualization regime. The features of these regimes are summarized in Table 1.

The book also analyses between and within-gender inequality, drawing on the Luxembourg Income Study datasets to examine evidence across the eight high-income countries representatives of what we call 'labour market policy regimes' from 2007 to 2015. The research investigates gender inequality trends before and after the global financial crisis. It adopts several indicators, such as the 'added-worker effect', the gender share of involuntary part-time employment after the crisis, female income inequality before and after government intervention as measured by the Gini index, and inequality within and between subgroups of women as measured by the Theil Index. For all countries in our sample, these indicators were investigated at two specific periods: one pre-crisis (2007), and one post- crisis (2012–2015). The study uses several analytical techniques, including the framework of decomposition analysis and quantile regression. The decomposition approach deals with group heterogeneity within a country by breaking down individual inequality into between-group and within-group components to study inequality across social groupings within nations. Decomposition by population subgroups aims to assess the contribution of individual features, such as age, occupation, presence of partner and age of children, to total inequality. We chose five factors as the possible drivers of income inequality within and between women: age, age of children, presence of a partner, the composition of the household, and occupation. We investigated the evidence available before and after the economic recession and how the crisis affected within-women and between-women inequality.

Our line of enquiry critically moves beyond the conventional analysis of gender, where gender is represented in terms of a homogenous group. Women do not constitute a cohesive social unit of identical individuals, all facing the same circumstances, positions, settings and

Table 1. Regimes of gendered labour market policies

Regime	Spending on active labour market policies	Spending on passive labour market policies	Use of short-time work	Employment protection legislation	Incentives for female employment
Gendered sectoral dualization regime	Medium-low	High	Very frequent	Strong for permanent workers (insiders)	Medium-strong
Gendered learnfare flexibilization regime	High	Medium	Infrequent	Balance between protection and active policies	Strong
Gendered de-regulation regime	Low	Low	Infrequent	Weak	Weak
Gendered stratified dualization regime	Low	Medium-high	Frequent	Strong for core workers (firms with >15 employees)	Very weak

status. Women undergo various experiences and social positions, which must be accounted for. The scant literature on within-women inequality differentiates women by social class, measured by educational attainment, income level or occupation. Our research enriches this literature by breaking down 'gender' into sub-groups according to age, marital status, number of children and occupation to explore whether there is any evidence of income inequality between and within women subgroups among countries.

Our evidence suggests that the eight countries we studied featured different gender inequality outcomes. Decomposition analysis of gender inequality indicates that before the onset of the economic downturn, market income inequality was higher 'within' the female workforce than 'within' that of male workers in almost all gendered political economies. Second, and focusing only on women, after the crisis, market income inequality increased more sharply in the stratified gender dualization regime, represented by Spain and Italy, indicating the greater vulnerability of women workers in those countries. In the gendered sectoral dualization regime of Germany and the Netherlands, market income inequality fell, perhaps due to the 'added worker effect' or the implementation of more effective gendered labour market policies. This result is consistent with recent findings that indicate higher earning penalties in labour markets with weaker employment protection legislation for women, especially in a context of high macroeconomic volatility. Our results for disposable income inequality show the importance of government cash transfers in mitigating market income inequality among women in all four regimes of political economy we examined. As expected, there was a more substantial buffering effect from the tax and transfer system in the two Scandinavian countries and the Netherlands. In contrast, its impact was weaker in the USA. These figures suggest that in most countries, discretionary governmental policies shield women’s incomes against economic downturns. In Spain, however, disposable income inequality rose, indicating that government policies were insufficient to protect women's living standards. Spain was one of the countries hit hardest by the recession. Different starting levels of inequality, and the political-economic institutions underlining this situation, may have worsened the opportunities for female workers. The findings point to the crucial importance of women-friendly policies in buffering the adverse effects of the global financial crisis on inequality 'within' women subgroups.

The decomposition analysis by age shows that inequality 'between' age groups increased in all countries except the UK, where it was stable (Table 2).

Between 2007 and 2013, female within-age group inequality dropped in both the gendered sectoral dualization regime of Germany and the Netherlands and in the liberal deregulation regime of the USA and the UK, but rose slightly in Denmark and significantly increased in those countries adopting the gendered stratified dualization regime of Spain and Italy. Spain stands out as the country with the most dramatic increase in inequality among young women aged between 20 and 25 (36.8 pp), whereas the UK and the USA exhibited downward trends in this age group, probably as a result of a more flexible labour market,

Table 2. Inequality within and between female workers, by age subgroups

Country	United Kingdom		United States		Germany		Netherlands	
Year	2007	2013	2007	2013	2007	2013	2007	2013
20-25	24.9	21.1	55.3	51.8	37.6	41.8	38.7	42.1
26-35	30.4	31.4	40	35.7	36.7	34.3	25.8	26
36-45	38.3	37.4	40.8	35.7	38.9	35.7	33.8	33.7
46-55	31.9	31.9	37	37.6	37.5	31.7	29.4	29.5
56-60	34	35.7	33.2	40	31.9	40.9	35.1	25.5
Within-group inequality	32.7	32.3	39.6	38.2	37.1	35.2	30.8	30.1
Between-group inequality	0.9	0.9	2.4	3.1	2.1	2.3	1.7	3.3

Country	Norway		Denmark		Spain		Italy	
Year	2007	2013	2007	2013	2007	2013	2007	2013
20-25	30	33.9	28.2	34.7	26.8	62	16.5	19.6
26-35	28.7	28.7	19.7	23.3	22.6	36.7	15.6	28.7
36-45	23.6	22.1	16.6	16.7	28.7	35.2	19.4	29
46-55	20.3	21.3	12.7	17.3	28.4	39.3	19.7	34.7
56-60	22.5	21.2	14.3	17.9	31.3	40.1	28.1	23.4
Within-group inequality	24.3	24.1	16.6	19.4	26.6	38	19.2	30.3
Between-group inequality	1.5	2.7	2.2	3.9	1.5	3.5	1	1.2

Source: own calculations from LIS

although in our baseline year of 2007 inequality among young women was highest in the gendered political economy of the USA (55.3%) and lowest in Italy (16.5%).

The interaction of gender and age may worsen the conditions of young women workers. The increasing dualization of the labour market seems to have particularly severe effects on the gendered stratified dualization regime. In this regime, young women are exposed to the increasing flexibility of the labour market but are less protected by compensating measures, contrary to what happens in the gendered learnfare flexibilization regime. During the Great Recession, the dual effect of greater flexibility and weaker employment protection in the gendered stratified dualization regime widened the gap between our four clusters of gendered political economies. Inequality among the insiders, that is, older women workers (>36 years) declined in most countries, pointing to the buffering effect of 'insiders' benefits, albeit with the important exception of the gendered stratified dualization regime countries. Inequality 'between' age groups increased in all countries except the UK, but its contribution to total inequality was much lower than that of 'within' age group inequality.

Decomposition by household type shows that in countries with inadequate provision for reconciling work and family responsibilities, such as in the stratified gender dualization regime of Spain and Italy, within-group inequality was higher at the beginning of the recession and rose much faster than in the other countries. The low levels of de-familialization of the stratified gender dualization regime mean that mothers cannot rely on extensive public care for dependent family members, thus reducing their possibility of working longer hours or finding a new job. Single mothers experienced lower inequality in Germany and the Netherlands, due to lower overall wages earned by this subgroup, or to the buffering effect of social welfare benefits.

Decomposition by occupational subgroups shows that income inequality 'within' women was significantly lower in Denmark and the Netherlands, and highest in the USA. In Denmark, inequality levels were lower in all occupational subgroups mitigating income polarisation within and between female occupational groups. In this country, the policy of wage compression and collective bargaining agreements, and the policy mix of generous passive labour market policies and active policies compress the wage structure. Nevertheless, Denmark exhibited the largest increase in inequality after the recession, which to some extent may have been driven by critical changes to its flexicurity regime and cutbacks to the generosity of unemployment benefits.

To properly evaluate gender inequality when glass-ceiling effects are present, we studied different segments of the distribution because gender wage inequality cannot be understood only as a difference in mean or median income between women and men. To delve into gender wage inequality at the top of the wage distribution, we followed the literature that uses the quantile regression technique. Consistent with previous work (Korpi et al. 2013), our results indicate that glass ceiling effects were stronger in liberal deregulation political economies than in gender learnfare flexibilization political economies. This finding may be the product of a policy process based on cooperative rather than competitive behaviour by social partners.

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Who are the bachelors? - Capturing degree heterogeneity within the tertiary level in comparative perspective

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Around the globe, countries face rapid educational expansion since the second half of the 20th century (OECD, 2023). In contrary to educational expansion after World War II, the so-called new millennium higher education expansion, mainly affects the tertiary level (Jungbauer-Gans, 2018; Schofer & Meyer, 2005). The share of higher education graduates has increased steadily between 1995 and 2015 so that in 2015 more than half of the working-age population obtained a tertiary degree in Canada, Ireland, Belgium and the US (Sauer et al., 2022). As a result of these expansion dynamics, heterogeneity within the tertiary level became increasingly relevant to explain societal outcomes such as employment opportunities, income inequality and social mobility (e.g. Pfeffer & Hertel, 2015). Among other things, this plays out through the degree structure.

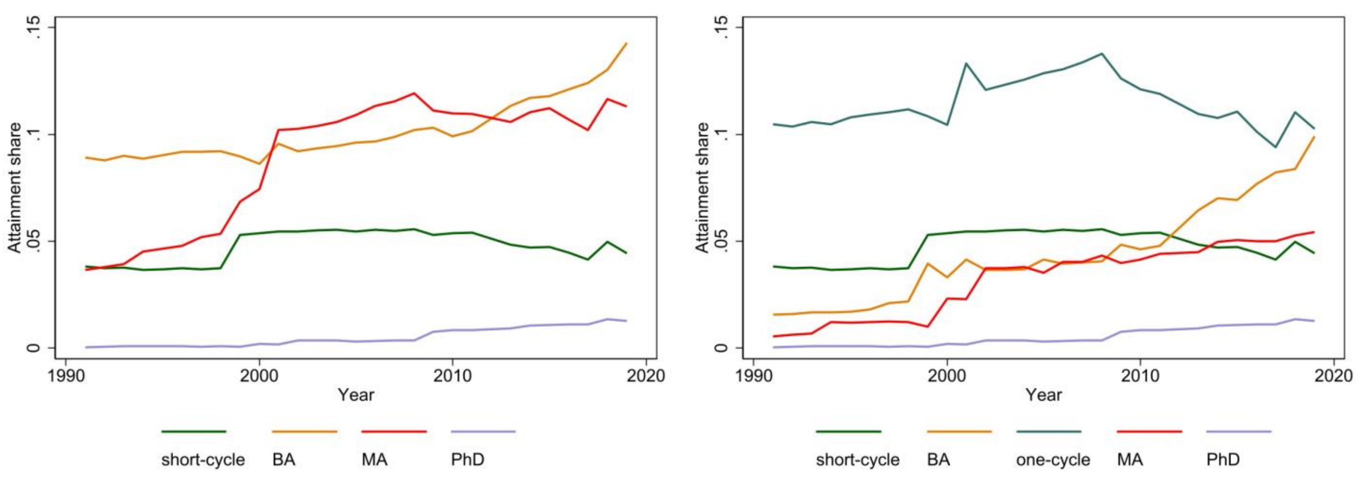
Since 2019, a variable (educlev) that enables to differentiate between short-cycle tertiary, bachelor (BA), master (MA) and doctoral (PhD) degrees is available within the LIS data for all countries and time periods. This variable is constructed by translating national education levels into internationally comparable categories consistent with 1-digit ISCED11 levels (Schneider, 2013; UNESCO, 2012). As illustrated by Bar-Haim et al. (2019) in an earlier issue of this outlet, the more detailed education measure enables to obtain a more nuanced and potentially more accurate picture about the relation between higher education, corresponding labour market returns, and inequality. In line with the existing literature, they show that in the US, returns to short-cycle and BA degrees are lower than returns to MA and PhD degrees respectively, both in 1991 and in 2016. However, the increase in returns between the two time points is most pronounced for MA and PhD degrees while it does not exist for short-cycle degrees, which are predominantly obtained from community colleges in the US.

The two-cycle study structure in the US which mainly distinguishes between BA and MA degrees has a long tradition, which facilitates analyses of trends over time and across cohorts. In contrast, in some European countries like Germany, almost exclusively one-cycle structures existed until the Bologna process was initiated in 1998/1999 (Bologna, 1999; Sorbonne, 1998). Aiming to create a European Higher Education Area (EHEA), one of the central goals was structural convergence of higher education degrees. As a result, 20 European countries adapted their higher education systems so as to broadly establish two-cycle structures. Yet, the timing as well as the speed of implementation processes varied substantially across countries (Kroher et al., 2021) – Germany, for example, changed gradually over several years.

This poses challenges to comparative analyses as they necessitate harmonization not only across countries but also across birth cohorts within single countries. This raises the question of what it means that, for example, persons born in the 1960s are coded to have obtained BA or MA degrees or equivalent even if those educational certificates did not exist at the time they entered and completed higher education. To put it another way: who are the bachelors in countries having no tradition of two-cycle degrees?

Even if ISCED 2011 provides guidance on how to map one-cycle into two-cycle structures retrospectively, the resulting classification might entail misleading conclusions about expansion dynamics and related labour market outcomes. Therefore, LIS datasets store country-specific education classifications (educ_c) alongside the harmonized variables (educ, educlev). In the following, we illustrate how this information can be used to investigate educational expansion in Germany. We chose Germany as an example, because it is – with respect to the number of enrolled students – the largest European country that changed from one-cycle to two-cycle degree structure (Neugebauer et al., 2016). Traditional certificates like diploma, magister and state examina had a typical length of 4 to 5 years which enabled to enter the graduate labour market or to proceed to doctoral studies.

Figure 1: Higher educational attainment in Germany (by year)



Source: own calculations from LIS

The left panel of Figure 1 depicts time trends of tertiary educational attainment broken down by the detailed harmonized measure available in LIS data since 2019. The right panel shows trends based on a categorization we constructed by using country-specific education levels to distinguish `traditional' one-cycle degrees from the `new' two-cycle degrees. In Germany, the Bologna process was implemented in the period 2000 - 2004/05 (Kroher et al., 2021); below 50% of institutions had adopted two cycles in 2003, 50%-70% in 2007 and 85%-100% in 2010 (Diego & Sabic, 2015). Moreover, Germany is among the countries with the largest number of exemptions regarding field of study: medicine, dentistry, veterinary studies, pharmacy, law, theology and, in some states also teacher education remain excluded from the two-cycle structure (Diego & Sabic, 2015). Thus, with 10% of the population attaining a diploma certificate, one-cycle degrees remain the major category in 2019. However, while the attainment share was slightly increasing after unification, it has been declining steadily since 2009. At the same time, the share of graduates with a BA degree was constantly rising. This is also true, yet less pronounced, for the evolution of MA certificates.

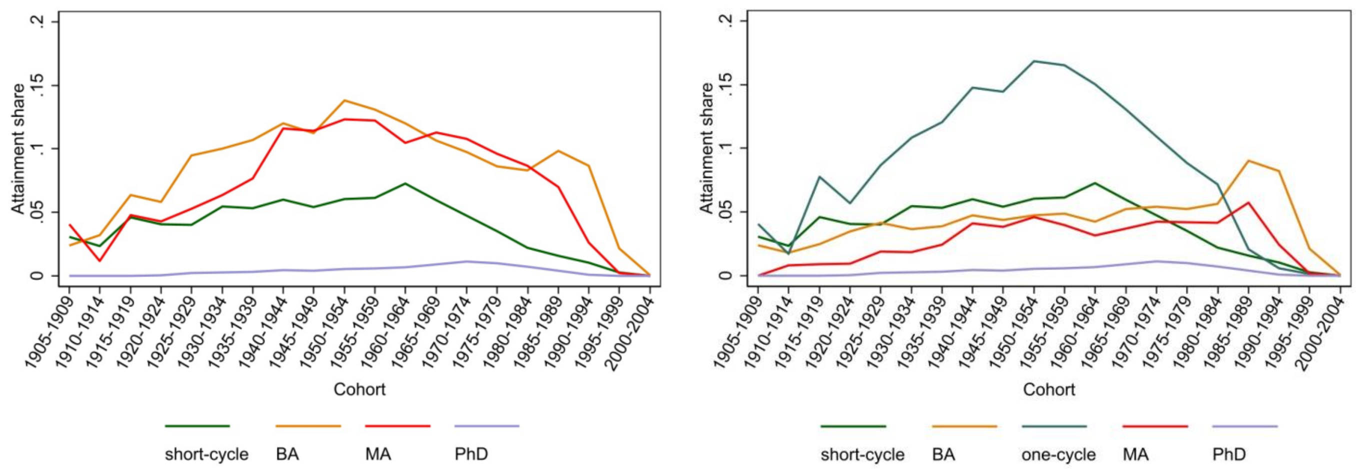
Consequently, applying international standards defined by ISCED 2011 to harmonize national certificates for older birth cohorts, one-cycle degrees obtained from universities are mapped into MA degrees, and one-cycle degrees obtained from universities of applied sciences (`Fachhochschule') are mapped into BA degrees. Thus, the MA attainment share depicted in the left panel hides both the shrinking relevance of one-cycle degrees as well as the increasing relevance of MA degrees, and, even more importantly, the actual attainment share of BA degrees is substantially overestimated. PhD and short-cycle tertiary degrees are categorized equally and show overlapping trends. The share of PhDs is marginally increasing. Short-cycle tertiary degrees which include certificates from technical schools (`Fachschule/Meister') were relatively stable but decrease slightly since 2009.

Looking at trends across birth-cohorts enables to obtain deeper insights into the transition from one- to two-cycles in Germany (see Figure 2). The cohort structure is obtained by pooling all available surveys (1991-2019, unbalanced). This has the additional advantage of larger sample sizes for each educational level. Before the broader implementation of the Bologna process, BA and MA degrees could be obtained from selected institutions and/or in particular, internationally oriented fields of study such as business administration. Therefore, a relatively stable share of around 5% among cohorts born between the 1940s and the 1970s obtained BA or MA certificates, with the latter share being slightly smaller. Diploma degrees are the major category for all but the most recent birth cohorts. For cohorts born after 1989, BA and MA degrees replace one-cycle certificates. Some of those recent BA graduates might still proceed to the MA level. The drop for cohorts born after 1995 is due to them being too young to have entered tertiary education. It is important to note that the harmonized measure would suggest a drop in MA and BA certificates already for cohorts born after 1959 which is in fact solely due to the implementation of the two-cycle structure.

For purposes of illustration, Figure 3 shows annual wages by harmonized LIS (left panel) and adapted (right panel) education level. Since there are no classification discrepancies, the time patterns of wage returns to PhD and short-cycle degrees over time resemble each other. As expected, MA and one-cycle degrees have similar monetary returns. However, we observe higher wage returns for BA graduates using the harmonized variable than revealed by accounting for differences in one-cycle certificates and BA degrees. It has to be noted that the latter time series might be biased downwards since we observe `new' post-Bologna BAs at an early stage of their occupational career when wages can be low as compared to `old' pre-Bologna BAs which are also observed at higher levels of seniority. More research is needed to disentangle age, period and cohort effects.

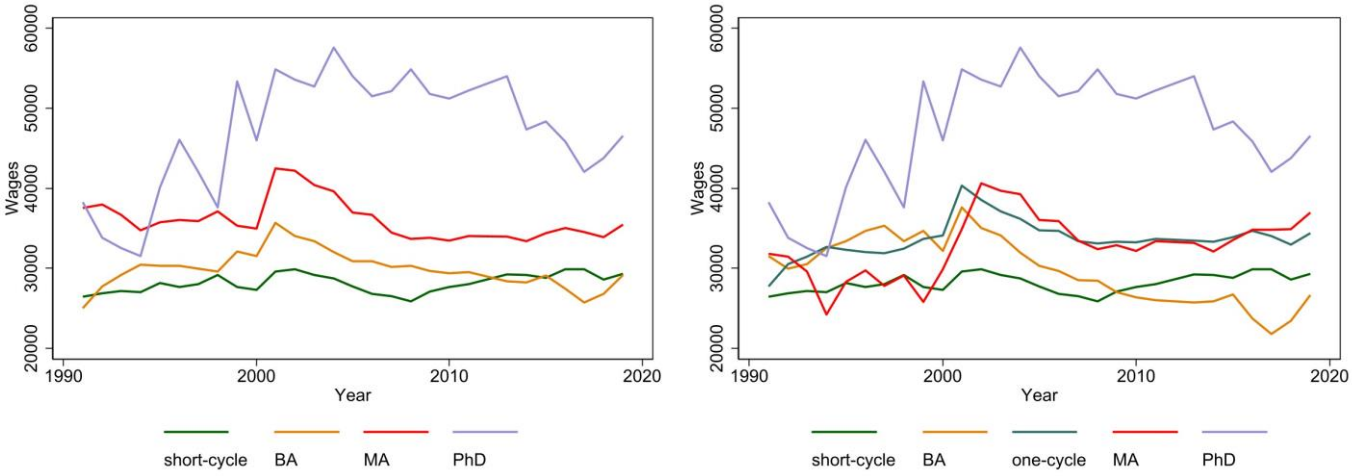
Wrapping up this contribution, we would like to provide some general conclusions. We had asked who are the bachelors?'. Our analyses have shown that harmonizing educational categories according to international standards may hide country-specific peculiarities and meaningful policy changes such as the Bologna process in Europe. In our example, Germany, some of the bachelors are actually graduates from one-cycle degrees from applied higher education institutions.

Figure 2: Higher educational attainment in Germany (by birth cohort)



Source: own calculations from LIS

Figure 3: Annual wages by higher education level in Germany



Source: own calculations from LIS

This could result in an inaccurate picture of expansion dynamics and of how increasing educational attainment affected labour market returns in some countries. These challenges notwithstanding, international comparisons are of great value for researching educational returns and inequality. To deal with potential pitfalls arising from differences in national education degrees, LIS data provides both harmonized and country-specific variables so that researchers can check classifications, validate the interpretation of their results or create their own categorization in alignment to the specific research purpose and question.

In conjunction with this newsletter, we provide a compilation of the timing of implementing a two-cycle degree structure in countries available in LIS data. Information provided are based on Kroher et al., (2021) and Diogo & Sabic, (2015). The dataset can be found here.

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Data News / Data Release Schedule

LIS is happy to announce the following data updates:

Canada – Addition of annual/biennial datapoints for the period 1971 to 1995 to the **LIS** Database (13 new and 6 revised).

Luxembourg – Annualisation from 1985 to 2019 for the **LIS** Database (21 new and 14 revised).

Spain – Annualisation for two series 1993 to 2000 and 2004-2019 for the **LIS** Database (17 new and 7 revised).

Serbia – The Serbian ISO-3 code in the **LIS** microdata (LIS variable *iso3*) now correctly refers to 'SRB'.

Data Releases and Revisions– Luxembourg Income Study (LIS)

Canada

LIS has added 13 more data points to the Canadian data series in the **LIS** Database. All 13 datasets are based on the Survey of Consumer Finances (SCF) provided by Statistics Canada. For the early years the series is biennial (**CA71**, **CA73**, **CA75**, **CA77**, **CA79**, **CA81**, **CA82**) and annual since CA84 to CA95.

The previously available data for **CA75**, **CA81**, **CA87**, **CA91**, and **CA94** were fully reharmonised with the latest available microdata from Statistics Canada; **CA71** was revised for consistency.

Please note that for the period 1971-1985 in the LIS files various socio-demographic characteristics and incomes are only available for the head, or head and their spouse; in addition, age intervals of the children of the head or spouse were provided, LIS variable *age* now includes these values. Labour income is only available as total income from wages and self-employment for the head and their spouse (available in variable *pilabour*), besides labour income no other income is available at the individual level.

Luxembourg

LIS has annualised the data series for Luxembourg adding 21 new datasets starting from 1985 until 2014 which are completing the already annualized datasets from 2015 to 2019. The data refer to the three series of the Socio-economic Panel Living in Luxembourg (Panel Socio-Economique Liewen zu Lëtzebuerg): PSELL I covering the LIS income reference years 1985-1993; PSELL II covering the years 1994-2001, and PSELL III which starts with LIS income reference year 2002 and is still on-going. The data for the period 1985-2014 have been provided by the Luxembourg Institute of Socio-Economic Research (LISER). From 2015 the data are provided by the National Institute for Statistics and Economic Studies (STATEC).

Eight of the previously existing oldest data points (**LU91**, **LU94**, **LU97**, **LU00**, **LU04**, **LU07**, **LU10**, and **LU13**) have been fully reharmonised in line with the latest harmonisation practices. However, due to the different reference period of the income year in PSELL I, the old datapoint **LU91** is now the revised dataset **LU90** (while the new **LU91** data is based on the 1992 survey), and the old datapoint **LU94** is now the revised dataset **LU93** (corresponding to the last wave of PSELL I, while the new **LU94** data is based on the first wave of PSELL II). Furthermore, the first datapoint of the series, **LU85** was completely replaced with the new data using the 1986 survey due to the fact that the reference income year was overlapping. In the first wave of PSELL I that was previously used for **LU85** the income reference period is January to April 1985 while in the second wave of PSELL I that it is used now for **LU85** the income reference period is May 1985 to April 1986. Consequently, the first wave of PSELL I was completely withdrawn from the LIS database. Nevertheless, certain information that were asked only in the first wave of the PSELL I panel were used for the harmonization of the subsequent waves.

The other reharmonised old datapoints did not change reference year. The existing newest datasets (**LU15** to **LU19**) were only slightly reviewed to be in line with the whole series.

Spain

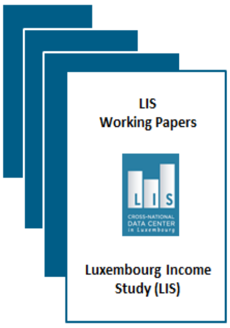
The Spanish **LIS** Database series contains now annual data. LIS annualised two series: The first period (1993 to 2000), refers to the European Community Household Panel (ECHP). The second period (2004 to 2019) is constructed based on the Survey on Income and Living Conditions (SILC). Both data series were provided by the National Statistical Office.

The previously existing data points (**ES95**, **ES00**, **ES04**, **ES07**, **ES10**, **ES13**, **ES16**) were fully reharmonised with the latest harmonisation practices. This led to two substantial revisions. First, the newly available data point **ES04** refers now to gross incomes, whereas the previously available data only contained net income sources after deduction of social contributions and taxes. Second, the previously available datapoints **ES07** and **ES10**, as well as the new data points until 2012, were retrospectively linked to administrative data by the National Statistical Office.

LIS/LWS Data Release Schedule

	Summer 2023	Autumn 2023
LIS Database		
Belgium	BE18/19/20	
Ireland	IE20	
Italy	IT20	
Luxembourg		LU20
Mexico		MX20
Sweden	SE75-SE20	
Taiwan	TW17/18/19	
Uruguay	UY20	
United States	US63-US78	
LWS Database		
Colombia		CO10-CO18
Italy	IT20	
Mexico	MX19	
Spain	ES20	
Uruguay		UY12

Working Papers & Publications



Focus on Measurement Matters: Family Leave Policies and Women's Employment LIS WP No. 855 by Brigid Cotter (University of Southern California)

Although work-family scholars generally agree that maternal and parental leave policies affect women's labor force outcomes, the direction and extent of this effect is highly contentious. Using data from the Luxembourg Income Study (~2013) and an original collection of parental leave measures from 26 countries, this paper analyzes how different measurement strategies affect women's employment rates by examining combinations of paid and unpaid maternal and parental leave, wage replacement rates, job protection, and eligibility requirements.

Focus on The Distribution of Private Transfers in the United States and France LIS WP No. 851 by Rachel Karen (University of Texas at Austin)

Financial transfers between households provide material and/or symbolic assistance while simultaneously strengthening ties between the givers and the recipients. In this study, the author examines the distribution of financial transfers between households in the United States and France using Wave X (2015-2017) harmonized Luxembourg Income Study (LIS) data.

LIS working papers series

LIS working papers series - No. 850
What Contributes to Rising Inequality in Large Cities?
by Luis Ayala, Javier Martín-Román, Juan Vicente

LIS working papers series - No. 851
The Distribution of Private Transfers in the United States and France
by Rachel Karen

LIS working papers series - No. 852
Isograph and LaSiPiKa Distribution: The Comparative Morphology of Income Inequalities and Intelligible Parameters of 53 LIS Countries 1967-2020
by Louis Chauvel

LIS working papers series - No. 853
Labour Market Dualism and the Heterogeneous Wage Gap for Temporary Employment. A Multilevel Study across 30 Countries
by Sophia Fauser, Michael Gebel

Published in: Socio-Economic Review, 2023, https://doi.org/10.1093/ser/mwac072

LIS working papers series - No. 854
Testing Theories of Redistribution: Structure of Inequality, Electoral Institutions, and Partisan Politics
by Evelyne Huber, Itay Machtei, John D. Stephens

LIS working papers series - No. 855
Measurement Matters: Family Leave Policies and Women's Employment
by Brigid Cotter

LWS working papers series

LWS working papers series - No. 40
Grandparents "on Board":How They Translateinto the Number of Their Young Grandchildren
by Filip Chybalski, Edyta Marcinkiewicz

LWS working papers series - No. 41
Elderly vs Working-Age Generation: Homeownership and Housing Asset Inequality in a Cross-Country Perspective
by Edyta Marcinkiewicz

News, Events and Updates

Applications to the LIS Introductory Workshop, 21-26 May 2023, are open until March 20

LIS is excited to announce that the application to its annual introductory workshop is now open. This year's workshop marks the 31st edition after the first workshop took place in 1988. For the fourth time, LIS, the University of Luxembourg and LISER will jointly organize and teach the workshop on "Comparative Inequality Measurement using the LIS & LWS Databases". This workshop is a one-week intensive course designed to introduce researchers in the social sciences to comparative research on income and wealth distribution, employment and social policy, using the harmonised Luxembourg Income Study (LIS) and Luxembourg Wealth Study (LWS) Databases.

This year, the workshop coincides with the celebration of the 40th Anniversary of the LIS creation. Therefore, all the workshop students will get the opportunity to attend the Anniversary Lecture by Sir Richard Blundell, University College London on "The Measurement and the Modelling of Consumption: Progress and Prospects (in Economics and other Social Sciences)" on the 25th of May and the LIS 40th anniversary conference on the 26th of May.

The Workshop will be held at the University of Luxembourg, Belval Campus, Esch-sur-Alzette, Luxembourg from 21-26 of May 2023.

For more details about the workshop programme and practical information, please visit the workshop page.

Applications should be submitted online through this application form by March 20, 2023.

For questions and inquiries, please write to workshop@lisdatacenter.org.

Call for papers for the conference "Income and wealth inequality: drivers and consequences"

Gdansk University of Technology & Luxembourg Income Study (LIS) invites proposals for the conference Income and wealth inequality: drivers and consequences. The conference will take place on September 27-29, 2023 at the Faculty of Management and Economics, Gdansk University of Technology, Poland.

Scholars are invited to present the latest research developments on income and wealth inequalities from a theoretical, historical, and comparative perspective, elaborate on the role of public policy and technological progress in the evolution of inequalities, and understand the economic and social consequences of increasing economic inequalities. Since economic inequality is a complex problem, we invite submissions from scholars representing various social science disciplines that deal with the following research topics: 1. inequality trends; 2. intergenerational inequalities; 3. inequalities within the household; 4. developments in inequality measurement: income and wealth; 5. gender inequality and discrimination in the labor market; 6. consequences of household debt; 7. determinants and consequences of wealth accumulation; 8. understanding and measuring poverty with an emphasis on poverty reduction and economic development strategies; 9. preferences for redistribution: measurements, factors, and effects; 10. education, labor markets, and inequalities; 11. comparative assessments of social and fiscal policies on inequality and poverty; 12. impact of new technologies and Artificial Intelligence on social inequalities; 13. environmental protection and economic inequalities; 14. selected sustainable development goals and social inequalities; 15. Impact of crises on inequality and poverty, and policy responses.

More information about the conference, and submission guidelines available here.

40 years of The Luxembourg Income Study

This year, LIS is organizing a series of events to celebrate the 40th Anniversary of its creation. On the 25th of May, Sir Richard Blundell, University College London, will give the Anniversary Lecture on "The Measurement and the Modelling of Consumption: Progress and Prospects (in Economics and other Social Sciences)". In the following day, the 26th of May, LIS will hold a conference that will include presentations around the topics of inequality trends around the world, and global poverty and inequality (with interventions by François Bourguignon, Dean Jolliffe, Timothy Smeeding, Janet Gornick, Markus Jäntti, Francisco Ferreira, Facundo Alvaredo, Andrea Brandolini, Stephen Jenkins, Philippe Van Kerm, OECD colleagues).

Stay tuned for more information on registration!

Inaugural III/LIS Comparative Economic Inequality Conference - 24/25 February 2023, London

Within the framework of the newly created UK LIS Satellite Office, LIS organised a conference jointly with the International Inequalities Institute (III) of the London School of Economics (LSE). The conference, titled the Inaugural III/LIS Comparative Economic Inequality Conference took place on 24 and 25 of February on the premises of the LSE and included 14 parallel sessions for a total of 44 papers on a variety of subjects around the theme of comparative economic inequalities in income, wealth, debt, gender, race, class, space. It included both papers looking at cross-country differences using LIS/LWS or similar data, and papers building on comparative work focusing on inequalities across different socio-demographic or socio-economic groups within countries. Andrea Brandolini (Bank of Italy) gave a Keynote Lecture on Comparing Income Inequality: Drowning by Numbers, pointing to the recent increase in availability of income inequality, and the possible inconsistencies arising from it. Several people strongly connected to LIS were in attendance, including three previous Directors, LIS Board Members, LIS senior scholars, staff, postdocs of the US LIS Satellite Office, and a large number of LIS users (with about a third of the papers being based on LIS and LWS data).

Release of the UN Department of Social Affairs (UNDESA) 2023 World Social Report

LIS data was heavily used for some analysis underlying the latest World Social Report 2023 from the UN Department of Social Affairs (UNDESA). The report *Leaving No One Behind In An Ageing World* focuses on the economic and social implications of the ageing of the human population. It builds on the Plan of Action's framework for national policies to create equitable, inclusive societies for people of all ages, providing recommendations to put the rights and well-being of older persons at the centre, across the life course. In particular Chapter 4, which is fully based on LIS and LWS data, explores how ageing impacts poverty and inequality dynamics in both developed and developing countries. It gives a particular emphasis to the role of social protection, education and health care systems as well as the labour, in ensuring an adequate level of economic security in old-age. The analysis is further enriched by some empirical evidence on asset ownership across the life course.

LIS team participation in conferences

- Teresa Munzi and Petra Sauer gave a LIS presentation at the 16th Winter School on Inequality and Social Welfare Theory, which was held in Alba di Canazei (Italy) from January 8th to 13th. Teresa provided an overview of the LIS data, and presented the major innovations since the data was last presented in that same winter school a decade before, while Petra showed some examples of research which illustrated how LIS data can be used for cross-country comparative studies as well as for causal analyses of policy effects exploiting the yearly time series available for some countries.
- In February, Petra presented her work "Higher education and earnings inequality: A gender-specific perspective" (co-authored with Philippe van Kerm and Daniele Checchi) at the Quantitative Social Science (QSS) and Centre for Longitudinal Studies (CLS) seminar at University College London. The LIS working paper can be found here.
- On March 1st, Piotr Paradowski, Jörg Neugschwender and Heba Omar have given a virtual presentation on "Methodological approaches on how to measure risk of poverty with income and wealth" at the HDRO-IIEP-OPHI seminar series on multidimensional poverty and analysis. The presentation, explores how income, assets, and debt can be measured by various indicators in a multidimensional setting.
- During the NTTS (New Techniques and Technologies for Statistics) conference, March 6 - 10 March, Brussels, Josep Espasa Reig presented a talk about "Julia as a software for Official Statistics and Social Sciences". The video recording of the presentation, the slides and a short summary can be found here: https://github.com/JosepER/ntts2023_julia_for_official_statistics

The Stone Center at the GC CUNY announces its fifth cohort of postdoctoral scholars

A fifth cohort of postdoctoral scholars will join the Stone Center in September 2023. The two incoming scholars, each appointed for a term of two years, were selected from a large pool of applicants. Maximilian Longmuir was selected for the position that focuses on wealth inequality, and Meredith Slopen for the position focused on inequality in the U.S. or in other labor markets. The two incoming scholars were each appointed for a term of two years.

Max Longmuir is an economist whose work combines topics in household finance, labor economics, and distributional economics,with a special focus on wealth inequality. His research examines questions such as the relevance of households' portfolio choices on wealth inequality, and the effect of labor market risk on wealth accumulation processes. His interests also include methods for measuring the wealth distribution, intergenerational mobility along the wealth distribution, and the interdependencies of inheritances and labor market outcomes. Longmuir received his Ph.D. from the Freie Universität Berlin in 2021 and was a postdoctoral scholar at the Humboldt Universität zu Berlin, where he worked on intergenerational wealth inequality and its socio-demographic conditions in Germany.

Meredith Slopen works at the intersection of labor policy and health, drawing on interdisciplinary methods from social work, public health, and economics to explore the workplace as a site of intervention to reduce inequality. Her current projects focus on the impact of state-level paid sick leave policies on the health, well-being, and economic security of working families. Future research interests include policy responses to reduce inequality at critical junctures during a time of labor force transition. She previously worked as a research scientist at the New York City Department of Health and Mental Hygiene, specializing on evaluation, maternal health, and health policy.

For a full list of the Stone Center's current and former postdoctoral scholars, and more information about the program, see the Postdoctoral Scholars page.

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