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ARTICLES

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ARTICLES

Cornelia Zuell and Evi Scholz
10 points versus 11 points? Effects of Left-right Scale Design in a Cross-national Perspective 3

Hideko Matsuo and Koen Matthijs
The Impact of Well-Being on Fertility Intentions – An Analysis Based on the European Social Survey (2010) 17

Sarah Grunberg
Sensitive Populations and Self-reflexive Methods: Ethnographic Exploration of Race and Racism in Poland 47

RESEARCH PROJECTS

Mihail Chiru
The Vanishing Lists: Collecting and Matching Parliamentary Candidate Data in Romania 61

Inna Bell, Joshua Kjerulf Dubrow, and Ania Purisch
Advances in Methodology in Poland: Abstracts of Ask: Research and Methods in English, 1995–2007 77
10 points versus 11 points? Effects of Left-right Scale Design in a Cross-national Perspective

Cornelia Zuell and Evi Scholz
GESIS – Leibniz Institute for the Social Sciences

Left-right self-placement on a unidimensional scale is a standard question in many social and political surveys to measure respondents’ ideological orientation in a minimalist way. Although the left-right scale is a standard question, the scale design is not standardized across surveys. One aspect of scale design is the offer of a midpoint. This paper is about design effects on central left-right scale placement in a cross-national context. How do respondents answer if there is no true midpoint: Do respondents who want to express a middle position, in the case of a 10-point scale, use scale middle categories as a substitute for a true midpoint? Are findings consistent across countries? Offering a midpoint is much debated among researchers and quite often, a midpoint might serve as a hidden “don’t know” or a missing attitude. Does nonresponse increase when non-attitudes cannot be expressed by choosing the neutral midpoint to hide nonresponse? If middle categories in the 10-point scale work as substitute for a true midpoint in the 11-point scale, nonresponse will not differ. We tested these questions in a split-half experiment where either a 10-point or an 11-point scale was asked in an experimental web survey fielded in six countries. Our results seem to confirm the idea that respondents who favor choosing a scale middle find a virtual center in the 10-point scale. However, results are inconsistent in cross-national perspective.

Keywords: cross-cultural comparison, scale midpoint, left-right self-placement, open-ended questions, response behavior
1. INTRODUCTION

Left-right self-placement on a unidimensional scale is one of the standard questions in many social and political surveys to measure respondents’ ideological orientation. However, there is no general standard design for the scale. Usually, there are labeled endpoints “left” and “right” and a number of categories in between for the degree of left-right placement, but design differs due to the context of the question, the tradition of asking the scale, or methodological aspects, such as offering a midpoint.

Offering a midpoint is much debated among political and social sciences survey researchers. Quite often a midpoint on the left-right scale serves as a hidden “don’t know” (DK) or a missing attitude (Inglehart and Klingemann 1976, Potter 2001:11–12). To avoid problems in interpretation of a midpoint which might mix missing attitudes and substantive attitudes, there are studies where the scale is designed with an even number of scale points and, accordingly, without a true midpoint. On the other hand, there is research that recommends using a midpoint and a scale with an odd number of scale points. While this research is not focused on the left-right scale but on Likert and rating scales, we assume that these findings also apply for the ideological self-placement scale. O’Muircheartaigh, Krosnick and Helic (2000), for example, examining agreement rating scales and using Eurobarometer data, found that midpoints do not compromise data quality. They also found that omission of midpoints did not lead to an increasing use of the categories neighboring the virtual midpoint. It seems that respondents, who could not use a (not offered) midpoint, were disposed to decide for both moderate and extreme categories and do not concentrate on middle categories. In addition, their findings suggest that a midpoint or middle categories and “don’t know” do not cover the same underlying concept of a lacking opinion which speaks against the idea of a midpoint working as hidden don’t know.

Worcester and Burns (1975) found that a 4-point scale without midpoint pushes more respondents towards the positive end of the scale. Weijters, Cabooter and Schillewaert (2010) findings on the effects of scale design go into the same direction which leads to the assumption that scales with an even number of scale point might produce a positivity bias. O’Muircheartaigh et al. (2000) or Garland (1991) in contrast saw a tendency towards disagreement which might lead to a negativity bias.

Tourangeau, Rips and Rasinski (2000) found that strength and stability of attitudes might work as moderator of design effects. For the left-right scale under consideration Federico (2009) reported that political interest serves as key indicator of personal involvement in politics and moderates self-placement. Whatever technical considerations on scale design are, there are respondents with
a real, politically meaningful middle or neutral ideological attitude. How do they use a scale without a scale point which represents their middle or neutral position? Do they substitute the non-existing true midpoint by a virtual midpoint and tick one of the neighboring categories? Do respondents who genuinely belong in the middle of the scale make essentially random choices among the alternatives or do they stay next to the midpoint and choose more moderate than extreme categories?

For cross-national analyses, it is crucial that the interpretation of cross-national differences results from substance and not from response effects (Smith 2003). Cross-national differences in response styles or systematic response behavior due to design result in problems concerning comparative interpretation of the data (Yang, Harkness, Chin et al. 2010). For example, Rodon (2014), in his study on central placement on the left-right scale, observed significant differences between ESS¹ countries. He found two main reasons for a central placement: respondent’s party preference and a hidden nonresponse of politically uninterested respondents with considerable variation across individual countries. Differences in design effects that are only found in some countries but not in others produce problems in cross-national usability of scales and interpretation of data. Respondents from different countries might differ in their reaction on scale types where some types might produce a push into the direction of a social acceptable answer. What is the socially acceptable answer and what may be positively evaluated in one country and might be negative in another country. The connotation of “left” and “right” can be positive, neutral or negative. If the evaluation of left and right is the same in cross-national context, then there are no interpretation problems. If there are differences in evaluation, then there should be a push into different directions.

In this paper we investigate how respondents use a 10-point left-right self-placement scale (without midpoint) and an 11-point scale focusing on the use of the midpoint in cross-national perspective. National findings from the German SOEP² (Kroh 2007) suggest that both scales work well in technical perspective but that the 11-point scale works somewhat better in terms of substantive analyses of vote choice.

If both scales work in an equivalent way, then we expect that respondents find a virtual midpoint in the scale with an even number of categories and use the categories neighboring that virtual midpoint. Garland (1991) has run a split-half experiment where both a 4-point and a 5-point scale on importance of product labeling were alternatively asked to students in New Zealand. He checked the differences in relative frequencies between the odd and the even numbered scale points recalculating the 5-point scale distributions by filtering only for non-midpoint respondents to simulate a 4-point scale without midpoint. A test on significance showed that recalculated frequencies of the original 5-point scale were not similar to the respective frequencies of the 4-point scale and that the
differences were significant. He concluded that the use of a midpoint lead to a distortion of the distributions. The scale with an even number of scale points forces respondents to make a choice and leads to different frequencies of the two more middle categories. We will test this finding for the 11-point and 10-point left-right scale and check whether results are consistent in cross-national context.

H1: In a 10-point scale without a true midpoint, respondents find a virtual midpoint and use the middle categories 5 or 6 as a substitute.

If a 10-point scale without true midpoint and an 11-point scale with true midpoint do not differ in performance across countries, we do not expect differences in the amount of “don’t knowers” in between the two scales in any country in the experiment. Even when the midpoint of the 11-point scale works as a hidden “don’t know” non-attitude might also be hidden in the 10-point scale and its middle categories 5 and 6.

H2: If the middle categories in the 10-point scale work as a substitute for a true midpoint in the 11-point scale, there will be no significant difference in nonresponse between a 10-point and 11-point scale.

Following the idea of social desirability pushing respondents who are offered scales with an even number of scale points into the direction of scale endpoints, we expect a more skewed distribution for the 10-point scale than for the 11-point scale.

H3: A 10-point left-right scale will be more skewed than an 11-point scale.

Pursuing the idea of social acceptable answers and a push, there still is the question whether findings are similar across countries. “Right” in many languages does not only refer to a direction but has also got a positive connotation of “correct”, “just”, “honest”, or “law” (in German: Recht; in French: droit; in Spanish: derecha) while “left” often refers to “inept”, “gauche”, or even “cheat” and has got a more negative meaning. However, in terms of political and historical context, countries might differ (Bobio 1996:40-41). For example, “right” in Germany has a negative connotation and is sometimes linked to right-extreme. The coding scheme developed by Zuell and Scholz (2012) documents a variety of associations with the terms “left” and “right” in cross-national perspective.

So, in the case of the 10-point scale, is there a push into the same direction or do countries differ according to differences in social acceptability?

H4: In countries where “right” is socially desirable and assessed positively, the push will be to the right of the scale and the skewness will be negative. In countries where “left” is socially desirable and assessed positively, the push will be to the left of the scale and the skewness will be positive.
If design effects are moderated by strength of political involvement we expect that respondents with strong political interest behave more robust against changes in scale design than respondents with a low interest.

H5: If political interest moderates design effects, for politically uninterested respondents design effects are stronger than for politically interested respondents.

2. DATA, SPLIT-HALF EXPERIMENT

To test our hypotheses, we use data from the 2011 CICOM project, which ran web surveys in six countries: three Western European (Denmark, Germany, and Spain); two North American (Canada and the U.S.); and Hungary as a former Communist country. Respondents were drawn from non-probability access panels according to pre-set quotas based on gender, age, and education to obtain balanced samples of nationals aged 18-65. Sample sizes are approximately 500 at a minimum.

Respondents were asked to indicate their ideological position by placing themselves on a horizontal left-right scale with the labeled endpoints “left” (at the left hand side) and “right” (at the right hand side). A probe question followed on a separate screen, asking respondents to specify what they mean by the terms “left” and “right”. For both questions, answers were not forced and respondents were reminded by soft checks which allows for nonresponse in general. The survey’s visual design was identical for all countries in the survey. To test effects of the left-right scale design, a split-half experiment was used: Half of the respondents received the 10-point scale and the other half of the respondents received the 11-point scale.

The experimental questions on the left-right scale were located in the middle of the interview, between a question on satisfaction with democracy and items on immigrants.

A tendency to a positive, a neutral or a negative meaning of “left” and “right” in the countries in the experiment was extracted from the probe questions on left and right which indicates the respondents’ individual assessment. These answers were coded using a coding scheme described by Zuell and Scholz (2012). We have analyzed the answers to the open-ended questions and checked for the most frequent associations. We found cross-national differences in what is associated with left and right. While there are associations where the meaning is either neutral or can be seen in a positive or a negative way, we could find clear negative associations what is linked to “right” in Germany referring to extremism, radical ideas or xenophobia (national socialism by 16%, xenophobia by 11%, right wing radicalism by 6%, radical by 6%). For all other countries in the experiment, the ideas mentioned on the meaning of “right” do not have such a negative connotation. In contrast, in Denmark, Hungary and in the U.S., we could find a slightly more positive meaning referring to individualism in Denmark (mentioned by 8%), to
patriotism in Hungary (mentioned by 13%), and to freedom in the U.S. (mentioned by 8%). In Spain and Canada, the most frequent answers with respect to “right” do not have either a positive or a negative meaning. “Left” in all countries in the experiment except the U.S., is linked to solidarity or equality and thus has a more positive meaning. In the U.S., in contrast, “left” has a more negative connotation, being associated with regulation (which, in the given coding scheme, was defined as the opposite category to freedom and is mentioned by 7%). If the idea of social acceptable answers is working, then we expect a push into the left direction in all countries (the most in Germany, the least in Canada), but a push into the right direction in the U.S. To test for a push, we checked the skewness for both the 11-point and 10-point scale.

Our indicator which might moderate design effects is political interest, asked with five fully-labeled response categories (“very interested”, “interested”, “some interest”, “little interest” “not at all interested”). For analytical purposes we collapsed strongly interested and interested respondents and respondents who were not at all interested or report little interest in politics each into one analytical category in order to define two contrast groups and checked the frequency distribution for both groups individually. We did not consider respondents who reported to have some interest in politics, where we expected confounded effects.

3. RESULTS

If we compare the frequency distribution of the 11-point scale to the distribution of the 10-point scale to test whether relative frequencies of the middle categories are different, then there are inconsistent findings in a cross-national perspective with respect to significant differences (Table 1). We can find significant differences in all countries, namely for the categories in the neighborhood of the midpoint. However, both in Denmark and Germany there is also another category with significant differences between the 11-point scale and the corresponding 10-point scale category. For Denmark, there is a difference in the use of category 9 on a low level of significance; in Germany, there is a difference in the use of category 4, again on a low level of significance.

Findings by O’Muircheartaigh et al. (2000) that respondents who were not offered a true midpoint were disposed to decide for both moderate and extreme categories and do not concentrate on middle categories, are not replicated in our data either. We did not find a higher use of all categories in the 10-point scale than in the 11-point scale. Respondents, who were not offered a true midpoint, did not use all scale points but concentrate on the scale middle, and this is consistently in all countries in the experiment. Deviations from this finding which might compromise our hypothesis 1 are on a low level of significance only.
Table 1  Frequency distributions and differences between categories: 11-point and 10-point left-right scale (in %)

<table>
<thead>
<tr>
<th></th>
<th>Canada</th>
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<tr>
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<td>11-point</td>
<td>10-point</td>
<td>Diff.</td>
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<td>0.18</td>
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<td>0.15</td>
<td>0.11</td>
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</tbody>
</table>

* p ≤ .05, ** p ≤ .005, *** p ≤ .001
Checking for differences in nonresponse, we found that nonresponse in both the 11-point and the 10-point scales is low in all countries and varies from 5% in Spain to 13% in Canada for the 11-point scale and between 4% in Germany and 10% in Canada for the 10-point scale. The 11-point and the 10-point scale do not differ significantly in nonresponse. Differences between scales only vary from .1% to 2.8%. Results in which scale type nonresponse is higher are not consistent across countries: In Canada, Germany and Denmark the 11-point scale works slightly worse than the 10-point scale in terms of higher nonresponse while nonresponse is a bit lower for the 11-point scale in Spain and Hungary. In the U.S., we can find similar nonresponse for both scales with about 7% (Table 1). The missing significant design effects with respect to nonresponse speak in favor of hypothesis 2. A logistic regression (not reported in the paper in tabular form) with nonresponse as dependent variable and scale type and countries as explanatory variables (all variables are coded as dummies) does not yield other results: whether the 10-point or the 11-point scale was asked does not influence the use of don’t know whereas we consistently found an effect of country irrespective which country was taken as reference variable.

With respect to the skewness in the 11-point and 10-point scale, we found that skewness is consistently low (lower than 1.0) in all countries for both scales. However, results are not consistent across countries and the 10-point scale does not show higher values in skewness than the 11-point scale in general and most of the skewness is not significant: For the 10-point scale, skewness is slightly higher in Denmark, Germany, Hungary, and the U.S. In Canada the distributions are largely symmetric with figures between .0 to .05 for both scales. The skewness of the 11-point scale, however, is higher in Canada and Spain. So, in sum, distributions are not highly skewed, and it seems that a scale without midpoint does not push respondents towards the scale extreme categories in general. Thus, we cannot confirm hypothesis 3 (Table 1, Figure 1).

**Figure 1** Skewness of the left-right self-placement scale (10-point vs. 11-point)
The idea of social desirable answers assumes a push into the social desirable direction if a scale lacks a true midpoint. Considering the answers from the open-ended questions, we expected a push into the right direction in the U.S., while for the other countries in the experiment a push into the left direction was assumed with the strongest effect in Germany. In fact, in the 10-point scale without midpoint we could find a negative (low) skewness in the U.S. and Denmark and positive values in Germany (.33), Spain (.08) and Hungary (.17). The German distribution for the 10-point scale is the only one with a higher skewness in relation to its standard error. So, there is no general push into one direction, but in different directions due to different social acceptability across countries, except for Denmark where we expected a positive skewness based on a more positive evaluation of “left”. While the effect is not very large, hypothesis 4 is confirmed by our data with the Danish exception. Denmark might be exceptional due to uncleanness of terms. “Right” in the Danish language “venstre” might be mixed up with a Danish liberal party named “Venstre” which can be seen in the answers to the open-ended questions where the party was associated with both “left” (4% or respondents) and “right” (10% of respondents).

Testing for effects of political interest as moderator of design effects, we expected that strongly politically interested respondents would show less differences between an 11-point scale with midpoint and a 10-point scale without midpoint than politically uninterested respondents do.

For respondents with a low or no political interest where strong effects from scale design and thus high differences in relative frequencies between scales were assumed, we found, consistently across countries, higher relative frequencies for the middle categories in the 10-point scale than in the 11-point scale and significant differences for one of the middle categories (Table 2). Deviations from a concentration on middle categories can be found for Germany and for Denmark: There are additional scale points with significant differences, however, on a low level of significance.

For respondents with a strong political interest we expected lower design effects than for politically uninterested respondents. For those who are more interested in politics there are highly significant differences in Canada, Spain, and Hungary and no significant differences in the U.S. and Denmark. Germany appears as the outlier with significant differences on a low level of significance on the scale points 2, 5 and 7 and no highly significant differences. In general, differences are lower for politically interested respondents than for the uninterested respondents (Table 2), except for Spain. While results confirm our hypothesis 5 on moderating effects of political interest in most of the countries in the experiment, it is not confirmed in general.
<table>
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<td>-3.0</td>
<td>1.2</td>
</tr>
</tbody>
</table>

\(^a\) not interested: 11-point scale DK: 18.3%, N 126; 10-point scale DK: 17.0%, N 112; interested: 11-point scale DK: 5.3%, N 76; 10-point scale DK: 2.8%, N 71
\(^b\) not interested: 11-point scale DK: 18.6%, N 97; 10-point scale DK: 17.8%, N 101; interested: 11-point scale DK: 0.0%, N 77; 10-point scale DK: 0.0%, N 69
\(^c\) not interested: 11-point scale DK: 8.5%, N 142; 10-point scale DK: 11.5%, N 131; interested: 11-point scale DK: 2.2%, N 184; 10-point scale DK: 1.0%, N 204
\(^d\) not interested: 11-point scale DK: 11.3%, N 97; 10-point scale DK: 16.2%, N 99; interested: 11-point scale DK: 2.6%, N 76; 10-point scale DK: 4.1%, N 74
\(^e\) not interested: 11-point scale DK: 9.5%, N 95; 10-point scale DK: 13.5%, N 89; interested: 11-point scale DK: 3.0%, N 99; 10-point scale DK: 1.1%, N 88
\(^f\) not interested: 11-point scale DK: 14.1%, N 85; 10-point scale DK: 16.8%, N 101; interested: 11-point scale DK: 2.2%, N 90; 10-point scale DK: 0.8%, N 118

\(^*\) p ≤ .05, \(^**\) p ≤ .005, \(^***\) p ≤ .001
4. DISCUSSION

Attempting to find out whether the middle categories of the 10-point left-right scale without a true midpoint work as a substitute for the true midpoint of the 11-point left-right scale, we implemented a split-half experiment in which one half of the respondents received the 11-point scale and the other half received the 10-point scale. In contrast to O’Muircheartaigh et al. (2000), we found that the omission of a midpoint lead to increased use of the categories next to the virtual midpoint in all countries in the experiment, but the increase is not consistently high across all countries. In contrast to their results, we could not find a higher use of all categories in a scale with an even number of scale points. Respondents, who could not use a (not offered) midpoint, did not decide for both moderate and extreme categories but concentrate on middle categories. This is a consistent finding across all countries. Both the 11-point and the 10-point scale work well in terms of nonresponse. That means, omission or existence of a midpoint does not significantly influence non-response. Our analyses show that the hypothesis of a push into the direction of scale endpoints for the 10-point scale without midpoint does not work consistently across countries and thus cannot be confirmed in general. The highest though still low skewness is found for the 10-point scale in Germany. The idea that social desirability pushes responses in the 10-point scale into the country-specific social desirable direction seems to be confirmed by our data while the effect is not very large.

In summary, our analyses indicate that the left-right scale does not work similarly across countries and design effects are not always clear. These different results across countries may indicate that there are different understandings of the left-right scale in a cross-national perspective which makes it difficult to use the left-right scale in a comparative way (e.g., Finlay, Simon and Wilson II 1974). However, it seems that the 11-point scale works better than the 10-point scale, in particular given the somewhat skewed distribution in the German 10-point scale. Whether the findings on left-right scale design can be generalized for other scales is unclear. A second scale experiment on democracy satisfaction included in the CICOM survey where design options were modeled parallel to the left-right scale did not yield similar results: The shapes of both the 11-point and the 10-point scale frequency distributions are completely different and there is no concentration on scale middles or midpoint at all which, in contrast, is a typical distribution of the left-right scale. So, the satisfaction with democracy scale cannot be used to compare results. Bauer, Barbera, Ackermann et al. (2014) found that the interpersonal comparability of the left-right scale is reduced by the very different meanings attributed to the vague left-right concept and raises concerns about the applicability of the left-right scale in comparative research. Considering our results we assume
that not only the interpersonal comparability of left and right is impaired but also the cross-national comparability. Weber (2011) investigating effects of labels in an 11-point scale in a test-retest experiment using cross-national ESS Round 4 data similarly found general patterns and exceptional countries. Weber offered democratic experience and nonresponse as arguments for deviating results. Our assumption for the somewhat unclear results for our left-right scale experiment is that latent attitudes or attitudes on topics that might be irrelevant to the respondent are more open to design influences than strong or robust attitudes are. This idea complies with findings on politically uninterested respondents presented in this paper where differences between 11-point and 10-point left-right scale seem to be higher than for politically interested respondents. Most researchers have used cross-national data but did not examine cross-national differences in effects of left-right scale design. Weber (2011) has started to check for the issue of cross-national comparability with respect to scale labels, we have checked for effects of length of scale, both of us found exceptional countries challenging the results of our analyses and the general comparability of left-right data. Further research on left-right scale design in cross-national context is necessary.

NOTES
1 ESS European Social Survey, http://www.europeansocialsurvey.org/
3 CICOM: Enhancing the Validity of Intercultural Comparative Surveys; project was funded by the German Research Foundation (DFG) [grant number BR 908/3-1].
4 Sample size: Canada 536; Denmark 559; Germany 1075; Hungary 559; Spain 559; USA 547
5 In Spain the most frequent categories on the meaning of right are “capitalism” (by 22%), “conservatism and tradition” (by 16%), “PP” (by 9%), “entrepreneurs and employees” (by 8%) and “religion” (by 6%). In Canada the most frequent categories on the meaning of right are “liberalism” (by 11%), “socialism” (by 8%), and “progressive” (5%).
6 Denmark: 12%; Germany: 14%; Hungary: 15%; Spain: 10%
7 Denmark: 8%; Germany: 8%; Hungary: 9%; Spain: 17%
8 The ratio between skewness and its standard error is higher than 2 which speaks for an asymmetric distribution.

REFERENCES


Cornelia ZueLL's research focuses on methodological aspects of social science surveys. One of her areas of interest is textual and content analyses, both with respect to data collection and data analyses. Cornelia's research has recently been published in Social Science Computer Review and the Bulletin of Sociological Methodology.

Evi Scholz is responsible for the German ISSP, is member of the ISSP Methodology Committee and the ISSP Secretariat. She is mainly interested in cross-national survey design and in the measurement of background variables. Evi's research has recently been published in Social Science Research and mda: Methoden, Daten, Analysen.
The Impact of Well-Being on Fertility Intentions –
An Analysis Based on the European Social Survey (2010)

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University of Leuven

This article examines the relation between well-being and fertility intentions in Europe and addresses three main research questions: Does overall well-being influence fertility intentions? What kind of well-being factors are more important in the determination of fertility intentions (individual-level subjective ones vs. individual-level objective ones vs. country-level ones)? Does the role of specific well-being variables change over the course of the life course, i.e. as age and parity increase? In accordance with the theory of planned behaviour (Ajzen, 1991), fertility intentions are studied as important predictors of actual fertility behaviour. And in line with established studies, a broad approach is taken towards the concept of well-being. The analysis is theoretically grounded in the framework of methodological individualism (i.e. micro-macro linkages). Use is made of data on women aged 20-39 in 27 countries, which were taken from the ‘Family, work and well-being’ module in the 5th round (2010) of the European Social Survey. The analysis of a comparable European population sample is made possible by taking account of both unit and item non-responses, and correcting for them. Our analysis shows overall positive but small correlations between well-being and fertility intentions in all countries: the higher the level of well-being, the higher the intended fertility, although the strength of the correlation differs between countries. Also, overall, individual-level objective well-being factors, such as level of education and employment status, have a larger impact on fertility intentions than individual-level subjective well-being factors and country-level well-being factors regarding human development, gender inequality and region. Changes in the effects of these well-being factors are found depending on the stage of the life course: as parity and age increase, the importance of country-level well-being effects increases. This shows that family-friendly country policies targeted to these groups can have positive effects on fertility.

Key words: fertility intentions, well-being, life course, linked lives, cross-national comparable sample, European Social Survey
1. INTRODUCTION

Many developed countries are marked by fertility levels below replacement level (2.1). Among those countries, a distinction can be made between those with fertility levels above and below 1.3, respectively. The latter are called “lowest-low” fertility countries (Billari and Kohler, 2002). The different fertility levels of these two groups of countries relate to differences in terms of female educational attainment, female labour force participation, the pursuit by women of higher order needs (e.g. individualisation), emancipation, and the use of modern contraceptives (Lesthaeghe, 2010). Empirical studies based on aggregate data have demonstrated that in Northern and Western Europe, the relation between female labour force participation and fertility turned from negative in the 1980s to positive in the 1990s. This has drawn attention to the important role played by the combinability of motherhood and work, and to the scope for policy intervention in this respect (Kohler, Billari and Ortega, 2006). Recent research shows that the number of “lowest-low” fertility countries has decreased dramatically in recent years (Goldstein, Sobotka and Jasillioniene, 2009). Whether a country is still marked by “lowest-low” fertility can be explained by the demographic trend of postponement, but also by the existing institutional structure comprising economic, policy and social factors supporting childbearing and childrearing activities by women and men.

At least in Europe, the concept of well-being has recently been an important issue on the policy agenda. Well-being is considered to have positive effects in different domains of life, including health and longevity, work, and partnership formation. It has been found, for instance, that individuals marked by higher levels of well-being are more likely to have stable partnerships and more children. A number of research projects on well-being and fertility are on-going.1 What remains relatively unexplored, however, is the impact of well-being on fertility intentions. Fertility intentions are good proxies for actual fertility behaviour, in particular since fertility outcomes are increasingly planned through the use of
reliable contraception. Actual childbearing behaviour results from individual and joint (couple) choices based on intentions formed by past experiences (i.e. the outcomes of past behaviour based on past choices based on past intentions) and the parallel processes (Willekens, 1991). This perspective is in line with the theory of planned behaviour, which takes account of beliefs, attitudes, norms, perceived behavioural control and intentions as determinants of behavioural outcomes (Ajzen, 1991). These behavioural outcomes are influenced by choice processes based on one’s reordering goals (e.g. selection and adaptation effect) (Lesthaeghe and Moors, 2000) in the life course perspective (Giele and Elder, 1998).

The objective of this paper is to study the impact of well-being on fertility intentions in several European countries. The first question is whether overall well-being influences fertility intentions in Europe. We then focus in particular on which type of factors (i.e. individual-level subjective well-being factors, individual-level objective well-being factors, country-level well-being factors) play a role. Important in our approach is the multi-dimensional perspective on the well-being concept. In addition to individual-level factors, account is also taken of country-level factors variables related to well-being. Finally, we study whether the role of well-being factors in the determination of fertility intentions changes over the course of one’s life, i.e. as parity and age increase. The paper also aims to make a methodological contribution. The analysis makes use of response-sensitive items (e.g. subjective well-being, fertility intentions) and therefore addresses non-response bias (i.e. both item and unit non-response) in a cross-national context. The combination of micro-level and macro-level measurements of similar items of socio-economic characteristics is also tested and discussed in this paper.

The structure of the remainder of this paper is as follows. Section 2 presents the study background on fertility intentions and well-being, including the literature review, theoretical framework and general assumptions. This section is followed by a description of data and sub-samples, measures and methods in Section 3. Section 4 consists of two subsections on results. In the first part of the analysis, a descriptive analysis of measures and a correlation analysis is provided, followed by a second part of results based on multi-level models. The final and concluding section 5 provides a summary of results and reflects on directions for future research.

2. STUDY BACKGROUND ON FERTILITY INTENTIONS AND WELL-BEING

2.1. Fertility intentions determinants as proxies for fertility behaviour and outcomes

The theory of planned behaviour (Ajzen, 1991) is central to an appreciation of the predictive power of (fertility) intentions with respect to actual (fertility) behaviour and outcomes. The theory can be applied in the field of fertility since contemporary
populations generally use effective contraception. Much research shows that fertility intentions have predictive power with respect to actual childbearing (Testa, 2014). Fertility intentions are measured through, for instance, the stated strength of the desire to have a child in the next two years [intended (circumstances and perceptions) or desired (unconstrained) fertility] or personal predictions of how many more children will be had (expected fertility). Short-term fertility intentions are considered to be powerful predictors in particular for negative intentions, meaning the wish to remain childless or to have no further children (Kuhnt and Trappe, 2013). Negative fertility intentions have direct consequences for the number of children that the individual will eventually have, and for the total fertility level at societal level. Obviously, at societal level, the gap between fertility intentions and actual fertility behaviour is of particular concern, not only in Europe but also elsewhere (Philipov, 2009; Basten and Verropoulou, 2015).

The gap between fertility intentions and fertility behaviour needs to be considered from at least two perspectives. On the one hand, when the ‘two child ideal’ becomes more prevalent in many European societies (Sobotka and Beaujouan, 2014), the existing gap will be mostly attributed to structural and/or biological obstacles as a result of the postponement of childbearing. On the other hand, this gap can be the result of adjusting choices of individuals responding to perceived societal norms, the so-called low-fertility trap (Lutz, Skirbekk and Testa, 2006). In the past, because of growing delays in motherhood, the intended family size was higher than the realised one (differences are 0.4 in the case of the British 1958 birth cohort) (Bennington and Pattaro, 2014). However, some evidence shows that fertility intentions are lower for the recent period and younger cohort. Austrian empirical research shows that in the period 1986-2001, fertility intentions were below replacement level among young adults (Sobotka, 2009). Fertility ideals in European countries are, therefore, showing the divergence of ideals between near-replacement and below-replacement ones (Sobotka and Beaujoudan, 2014).

2.2. Individual and contextual determinants of fertility intentions and the role of multi-dimensional well-being

Fertility intention determinants and the life course

Since the general research question is how well-being in all its aspects influences the fertility intentions of women, use is made of the theoretical framework of methodological individualism (Coleman, 1990). This framework attaches prime importance to micro-behaviour that is influenced by macro-conditions (e.g. social norms, socio-economic conditions, the gender system). The connectivity between intentions and behaviour is in line with the theory of planned behaviour (Ajzen,
1991). Macro-conditions refer to forms of institutions that convey information to and share information with individuals, emphasizing the importance of norms and beliefs as noted by Ajzen.

The theory of planned behaviour explains individual behavioural outcomes as results of biological and socio-demographic background, in addition to individual beliefs, attitudes, norms and perceived behavioural control (PBC) concepts. It is, therefore, not coincidental that fertility intentions are examined through the socio-economic attributes of the individual. Fertility intentions are primarily determined by age, gender, parity and education (Bennington, 2004). Based on an analysis of the British Household Panel Survey (BHPS – 1992, 1998), Bennington argues that, for instance, older childless women who are highly educated and (therefore likely to) have high earning levels and egalitarian gender attitudes, are less likely to intend to have children. The importance of determinants may differ slightly across countries, however, as cross-national analyses highlight the particular importance of education and income (Testa, 2014; König, 2011) with respect to the formation of fertility intentions. Testa (2014) argues that positive associations exist between women’s level of education and fertility intentions, though this relationship differs across nations.

In addition to these aforementioned ‘usual suspect’ determinants of fertility intentions, a wide range of other factors are also examined as determinants. These are employment status, income, and the age of the youngest child (e.g. Iacovou and Tavares, 2011; Billingsley and Ferrarini, 2014). Research shows that a stable relationship, financial security and being a parent are strong determinants of fertility intentions in the case of Germany (Kuhnt and Trappe, 2013).

The rather static nature of the theory of planned behaviour can be circumvented by taking a life course perspective comprising the view that individual background (e.g. family characteristics, partnership status, individual socio-economic conditions) varies throughout the life course (Giele and Elder 1998) and that this has consequential effects on fertility plans. Giele and Elder (ibid. p. 11) define four key elements that are crucial in the operationalization of life course research: human agency; location in time and place; linked lives; and timing.

Across the life course, fertility intentions can change and shift either upward or downward (Iacovou and Tavares 2011). Revising intentions downwards as age increases, is more prevalent (Bennington, 2004). In other words, when women become older (mid to late 30s), intentions change, reflecting the life course status. Iacovou and Tavares (2011) argue on the basis of the BHPS (1991–2007) that females’ revision of childbearing intentions arises from adjusting to partners’ expectations with respect to having a child (couple agreement or disagreement). Such changes in intentions are in reality the process outcome of couples’ and partners’ childbearing plans, illustrating the life course ‘linked lives’ concept.
The linked lives concept is highly relevant for fertility intention determinants. The primary role of social networks in determining the fertility tempo and quantum, through social learning and social support by families and also friends, is well studied (Bernardi and Klärner, 2014; Montgomery and Casterline, 1996). The social network, including friends, colleagues and also family (parents), plays a beneficial role giving practical support to women with respect to childbearing and childrearing activities. Grandparents’ involvement - providing emotional support and childcare help - can also have a positive effect on fertility intentions (Tanskanen and Rotkirch, 2014).

The interactions of family roles with macro-institutional and cultural contexts need to be considered in cross-national context (Balbo and Mills, 2011). Family support (e.g. emotional support, child care assistance) will have a positive effect in countries with limited institutional arrangements in places such as Southern Europe. When the state has put in place full institutional arrangements, strong family support provided for childbearing and childrearing is not necessarily required for achieving fertility intentions and may even have negative effects. The linked lives concept introduces complexity when early childhood experiences (Elder, 1974; Easterlin, 1980) are taken into account that influence parent-child relations.

Role of multi-dimensional well-being

The life course approach incorporates multi-dimensional well-being concepts. Important individual-level determinants of fertility intentions included in our analysis - such as education and economic security - are in fact dimensions of the multi-dimensional well-being concept, as demonstrated in established approaches in the field (Thompson and Marks, 2008, Abdullah, et al. 2011). The well-known Stiglitz Report (2009) already stipulated key dimensions of well-being including material living standards (income, consumption and wealth); health; education; personal activities including work; political voice and governance; social connections and relationships; environment (present and future conditions); and insecurity, of an economic as well as a physical nature. This report sets the views of people’s well-being since it highlights the importance of improving measures of ‘progress’ of societies in all dimensions that is beyond economic growth. This means the framework identifies the position of human well-being in relation to the economy and environment. It is therefore self-evident to consider that a wide range of behavioural outcomes are influenced positively by well-being. For instance, on the basis of substantial national and cross-national surveys and longitudinal evidence, Huppert (2009) reports that individuals with higher levels of well-being as measured by ‘happiness’ or ‘life satisfaction’ tend to be more productive, have higher incomes, better health, and higher life expectancy.
How people evaluate and experience their lives is the essential concept of well-being (Jeffrey et al. 2015). Three concepts of well-being are closely related to subjective well-being: life evaluation, affect and eudaimonia (flourishing) (OECD, 2013). These concepts can be further defined by sub-components of corresponding measuring concepts: (1) life satisfaction (income, health, work satisfaction); (2) affect (anger, worry and happiness); and (3) eudaimonic (competence, autonomy, and meaning and purpose). Determinants of these sub-components and concepts include: income, health status, social contact, employment status, personality type and culture (ibid. p. 33, Figure 1.1). The same line of theoretical argumentation is present in Abdullah and others’ (2011). Their dynamic model of well-being (Figure 3, p.13) clarifies the relation between different sub-components and concepts. As they argue: “The model describes how an individual’s external conditions - such as their income, employment status, housing and social context - act together with their personal resources (bottom right) - such as their health, resilience and optimism - to allow them to function well (middle) in their interactions with the world and therefore experience position emotions (top) (ibid. p.13).” The model considers four areas: (1) a person’s external conditions interact with (2) their personal resources to satisfy - to a greater or lesser extent - (3) their psychological needs, and to give rise to (4) positive feelings of happiness and satisfaction. This broad approach towards well-being is also taken by the European Social Survey, where attitudinal indicators concern societal progress incorporating individual cognitive evaluations of society’s functioning and social well-being, which goes beyond the mere measurement of GDP (Harrison et al. 2011).

The relation between well-being indicators and fertility intentions at the individual level is highly dependent on country (institutional) measures related to childbearing and childrearing activities. As mentioned earlier, well-being is highly dependent on individual-level variables like education, economic security, health, social activities and the level of overall happiness. An analysis of EU-27 countries (Billingsley and Ferrarini, 2014) shows that countries where women are more likely to reach the highest levels of educational attainment are also those countries where family-friendly policies and programmes for childbearing and childrearing activities exist. The more family-friendly policies are, the more practical measures likely exist concerning flexible working hours, maternal and/or paternal leave and financial entitlements including child allowances and tax benefits, and formal and out-of-school childcare facilities (OECD, 2007). In line with the ‘perceived behaviour control concept’, which concerns the individual ability to engage in behaviour regarding the availability of resources, such institutional arrangements can take care of a wide range of domains (e.g. housing, work arrangements, childcare facilities) that can have a positive impact on childbearing intentions (Billingsley and Ferrarini, 2014; Mills, 2008). The above discussion is further examined in
recent analyses of Aassve and colleagues (2015) adding to the understanding of the relationship between subjective well-being and childbearing behaviour. They argue that subjective well-being is a direct function of the discrepancy between aspirations and attainment, and their analysis shows that when institutions adopt women’s new preferences and aspirations, both fertility and happiness (form of well-being) are higher.

2.3. Research questions and hypothesis

The basic study framework is described in Figure 1. The framework integrates Coleman’s methodological individualism (1990), complemented with the theory of planned behaviour (Ajzen 1991), the life course approach (Giele and Elder 1998) and the well-being concept (Abdullah, et al. 2011).

![Figure 1 Theoretical framework of methodological individualism](source: Coleman (1990))

Our main interest is to study as to whether and how well-being influences fertility intentions in Europe. Three research questions are addressed:

1. Does overall well-being influence fertility intentions? (RQ1);
2. Which factors - individual-level subjective well-being factors, vs. individual-level objective well-being factors, vs. country-level well-being factors - are more important in the determination of fertility intentions? (RQ2);
3. Does the role of specific well-being variables change in the course of one’s life, i.e. as age and parity increase? (RQ3).

The first hypothesis is that a positive relation exists between well-being and desired fertility: the higher the level of well-being, the higher the desired fertility level (H1).

The second hypothesis is that individual-level objective well-being factors and country-level well-being variables are more important than individual-level
subjective well-being factors in the determination of fertility intentions (H2). The higher the level of education and economic security (i.e. employed) of women, the higher is their desired fertility level. The more advantageous the overall national context as reflected in the human development index and the lower the level of gender inequality at the country level, the higher the desired fertility level of the women living in that country. The reason is the impact these measures have on the affordability and likelihood of child support measures, which are taken into account when formulating fertility intentions.

The third hypothesis is that the role of individual well-being variables in the determination of fertility intentions changes over the life course, i.e. as parity and age increase (H3). We hypothesize that individual-level objective well-being factors and country-level well-being factors are more important for younger and lower-parity women, and less important for older and higher-parity women. On the other hand, individual-level subjective well-being factors are less important for younger and lower-parity women, and more important for older and higher-parity women.

3. DATA, MEASURES AND METHODS

3.1. Data

Our analysis is based on data from the European Social Survey (ESS), Round 5, which was carried out in 27 countries in the period 2010-2011 and included a repeat module on work, family and well-being.

For the purpose of this paper, data were tested for 27 countries (i.e. BE, BG, CH, CY, CZ, DE, DK, EE, ES, FI, FR, GB, GR, HR, HU, IE, IL, LT, NL, NO, PL, PT, RU, SE, SI, SK, UA). As shown in Table 1, the average response rate for this Round, calculated on the basis of contact files, was 60.2%, ranging from 29.7% (DE) to 76.1% (BG). The average non-contact rate was 5.4%, ranging from 0% (BG, CZ) to 21.6% (IE). And the average refusal rate was 25.0%, ranging from 11.0% (BG) to 39.6% (DE) (Matsuo and Loosveldt, 2013). For the purpose of working with comparable European population sample, ESS is highly suitable. The Central Scientific Team (CST) has always designed ESS to ensure the highest methodological quality for all aspects of survey design and safeguard the cross-nationally comparable aspect. Notable challenges exist in survey research concerning measurement and non-response errors. The aim of ESS is therefore to minimize survey errors through strict instructions that cover the wide range of survey design and data collection activities including questionnaire development, translation of each item into national language, applying strict probability sampling to the target population (aged 15 and above), and ensuring responses by targeting minimum non-response and aiming for 70% response rates and 3% non-contact rates. The total number of sample units collected in 27 countries in ESS Round 5 reached 52,458.
Data were used for 27 countries where country level information is also available through the designated website. Because of the paper’s focus on fertility intentions, the data were restricted to the 8,178 women (weighted sample) aged 20–39 years. The reason is that the question on fertility intentions targeted the age group of those born after 1965 in the survey design and this in order to measure and target the age group that realistically could be expected to want children.

### Table 1  Sample characteristics of European Social Survey Round 5 and units for analysis, 27 countries.

<table>
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<td>2,715</td>
<td>65.6</td>
<td>526</td>
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<tr>
<td>HR</td>
<td>1,649</td>
<td>54.2</td>
<td>251</td>
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<tr>
<td>HU</td>
<td>1,561</td>
<td>60.7</td>
<td>277</td>
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<tr>
<td>IE</td>
<td>2,576</td>
<td>59.8</td>
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<td>IL</td>
<td>2,294</td>
<td>72.3</td>
<td>401</td>
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<tr>
<td>NL</td>
<td>1,829</td>
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<td>226</td>
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<td>485</td>
</tr>
<tr>
<td>SE</td>
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<td>51.8</td>
<td>202</td>
</tr>
<tr>
<td>SI</td>
<td>1,403</td>
<td>64.4</td>
<td>202</td>
</tr>
<tr>
<td>SK</td>
<td>1,856</td>
<td>74.7</td>
<td>301</td>
</tr>
<tr>
<td>UA</td>
<td>1,931</td>
<td>64.5</td>
<td>311</td>
</tr>
</tbody>
</table>

Notes: 3rd column, source based on Matsuo and Loosveldt 2013. Other columns based on own analysis.
3.2. Measures

Dependent variable: Fertility intentions

The specific module in ESS Round 5 on work, family and well-being (section G) includes, at the end of the survey (G88), a question on ‘fertility intentions’ (plan having child within next 3 years), which is asked to respondents born after 1964 (filtered question). The response to this question is a 4-point scale ranging from 1: definitely not, to 4: definitely yes. Responses to this question are rather incomplete as missing items exceed 9% in 27 countries. Differences in terms of average response scales by country are presented in Table 3. For the purpose of our analysis, we created a dichotomous outcome (no fertility plans in next 3 years=0, have fertility plans in next 3 years=1) based on the aforementioned 4 point scale items.

Individual-level subjective well-being variables

Several items concerning individual well-being items are included in our model estimate. These are items where questionnaire design module document is consulted to identify these respective items. In our analysis, we make use of three types of subjective well-being variables envisaged in the questionnaire design (ESS, 2009):

- How happy are you? (11-point scale: 0 = extremely unhappy; 10 = extremely happy).
- How satisfied with life as a whole? (11-point scale: 0 = extremely dissatisfied; 10 = extremely satisfied).
- Subjective general health? (5-point scale: 1 = very good; 5 = very bad).

By reversing the scale for health, the scales were made consistent meaning that for each of the variables, the higher the value, the higher the level of well-being. Among all these variables, grand mean values are created.

Individual-level objective well-being variables

In our analysis, we made use of a number of individual-level objective well-being variables concerning education, economic security, partnership and social networks:

- Education is measured through an 8-point International Standard Classification of Education (ISCED) scale.
- Economic security is measured through the employment status for the main activities of the responding individual resulting into a dummy variable (0 = not employed; 1 = employed).
- Partnership status is measured through a combination of legal partnership status and relationship with partner currently living with, resulting in three
types of dummy variables concerning being in a consensual union or not, being single or not, and being divorced or not.

- Social networks are measured through answers to the question ‘how often socially meet with friends, relatives or colleagues?’ in the form of a 7-point scale (1=never; 7=every day).

For the analysis, grand mean values are created for 2 items of objective well-being, namely, education and social network. The remaining 4 items have dummy variables.

**Country-level well-being variables**

In order to examine the role of country-level well-being factors in fertility intentions (H2), three variables were included in our analysis: the Human Development Index (HDI), the Gender Inequality Index (GII) and region (Southern countries). The former two items were taken from 2008 United Nations Development Programme (UNDP) country data made available at the ESS website. The HDI measures country achievements in the area of long and healthy life (health), access to knowledge (education) and standard of living (income). The GII concerns the disadvantages for women in three domains: reproductive health, gender empowerment and labour market. Compared to the HDI, the GII is designed to identify national measures of human development specifically from the perspective of gender inequality. Being a Southern country or not, which is geographically determined, was included as a dummy variable in the model.

**Life course variables**

Age and parity were included in our analysis as important life course variables. Two types of age variable were used in our model in order to accommodate possible U-shaped relations, which are continuous and squared. Age has its biological dimension to consider for fertility behaviour. Parity concerns the number of children per woman, which is based on the household grid variables reported by the respondent at the time of survey. The number of children refers to those children who reside with the respondent including son, daughter, step-child, adopted and foster child. In order to capture children not residing with the respondent, ‘presence of child living outside of household’ (1=yes; 0=no) and ‘presence of small child (below 3 years) living at home’ (1=yes; 0=no) were included as dummy variables. The former was considered more as a control variable while the latter illustrates the woman’s life course status in the childrearing activities’ domain. Note that the actual use of these child-related items in the model was parity-dependent. For instance, ‘presence of small child living at home’ is irrelevant for childless women.
3.3. Methods

In order to work with cross-national data for 27 countries, and in order to examine fertility intentions as affected by a number of individual-level and country-level determinants, a multi-level analysis (two-levels) was applied. Several models were included in the multi-level analysis. The model was first estimated without any covariates (model 1), adding then individual-level subjective well-being factors (model 2), later individual-level objective well-being factors (model 3), and finally country-level well-being factors (model 4). The final model combined both individual-level and country-level level factors (model 5). The analysis was first carried out for women of all parities and ages in the weighted sample (N=8,178). The analysis was then carried out by parity and age: childless women (N=3,919); mothers with one child (N=1,826); mothers with two and more children (N=2,433); aged 20 to 29 years (N=3,761); and aged 30 to 39 years (N=4,417).

The purpose of model 1 was to assess the country variance with respect to sample data. In this model, the dependent variable equaled the dichotomous value of fertility intentions, for sample unit \( i \) by country \( j \). The intra-class correlation (ICC) was firstly obtained using SAS PROC GLIMMIX for the null model and all models as we considered the sample units to be measured and modelled at level-1 and level-2 (Snijders and Bosker, 1999). The obtained total variance of the model was decomposed as the sum of the level-two and level-one variances. It was therefore possible to obtain intraclass correlation coefficients (ICC)\(^2\) as this was the proportion of total variability due to the country level. The evaluation of the models and the identification of the best fitting model was done through the deviance test. The chi-square difference tests were performed by reviewing model fit information for all models estimated: the difference of the log likelihood ratios (-2LL) values across models. In each model’s results, values on variance of both level 2 and -2LL are presented. In all models, it is shown that fertility intentions vary significantly across countries, and also across individuals within countries, where the variance of the random intercept across countries and intra-correlations are studied. These figures are mean values for 5 imputed datasets.

In order to correct for potential non-response bias, use was made of the combined value of population size weights and non-response weights in order to take into account country differences with respect to these biases. These values are made available publicly as they are integrated in the public data file (ESS). Multiple imputation (SAS Proc MI) with five imputed data sets (Rubin, 1976) was used to obtain item non-response items.\(^3\) After reviewing the plausible auxiliary variables, in line with the theoretical construct, needed for the imputation procedure (SAS PROC MI), a combination of fully conditional specification (FCS) and regression (multivariate normal distribution) methods was applied referring to individual
variables (dummy variables) and continuous variables. During the process, the plausible auxiliary variables were tested by evaluating the correlations with all missing variables noted above.

A multi-level analysis was carried out in several steps. These steps were repeated for the models for all parities and for specific parities (i.e. childless, one child, and two child and above) and age groups using SAS Proc GLIMMIX and SAS MIANALYZE to work with imputed and weighted datasets. As a standard procedure for multi-level analysis, in order to interpret model results easier, all continuous variables were grand mean centred for level 1 and level 2 items.

4. RESULTS

Our results of descriptive analysis, correlation analysis and multi-level model analysis are based on an imputed, weighted sample. Descriptive statistics for all individual measures are shown in Table 2. This is followed by country-specific measures (mean or proportion) concerning original value of fertility intentions (scale 1-4) presented in Table 3. The results of each analysis are presented in Tables 4 to 6. Given the fact that we worked with 27 countries, and even though the intra-class correlation was relatively small, which will be shown below, we considered it most suitable to make use of multi-level models.

Parity-specific results (i.e. childless, one child, and second child and more) capture women’s fertility career, namely, ‘starting’ and ‘stopping’ of fertility. Starting behaviour can be observed comprehensively among the childless. Stopping behaviour can be observed for mothers of all parities who do not plan to have children in the near future (64% responds ‘no’).

Table 2 presents the descriptive analysis based on individual socio-demographic, attitude and country characteristics for all women. The mean age of the women in the 27 countries is 29 years. Most women are in a consensual union (57%), a substantial proportion is single (37%), and a non-negligible proportion is divorced (6%). Seventy percent of women are either childless at the time of the survey (48%) or have one child (22%). Most women (54%) are medium-educated (low medium and high medium) and a substantial proportion is tertiary educated (32%). More than half of the women are engaged in the labour force (57%). The socio-demographic profile differs by parity and country (Table not shown).
Table 2  Descriptive statistics (mean or %) on individual attributes used in analysis, 27 countries, N=8178 weighted sample.

<table>
<thead>
<tr>
<th>(Individual)</th>
<th>Mean or %</th>
<th>Standard Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>29.27</td>
<td>5.76</td>
</tr>
<tr>
<td>Age²</td>
<td>889.76</td>
<td>342.58</td>
</tr>
<tr>
<td>Education (ISCED above 5/tertiary)</td>
<td>31.58</td>
<td>N.A.</td>
</tr>
<tr>
<td>Employed</td>
<td>57.06</td>
<td>N.A.</td>
</tr>
<tr>
<td>In consensual union</td>
<td>57.42</td>
<td>N.A.</td>
</tr>
<tr>
<td>Single</td>
<td>36.61</td>
<td>N.A.</td>
</tr>
<tr>
<td>Divorce</td>
<td>5.66</td>
<td>N.A.</td>
</tr>
<tr>
<td>Small child at home</td>
<td>23.85</td>
<td>N.A.</td>
</tr>
<tr>
<td>Child living outside of home</td>
<td>2.47</td>
<td>N.A.</td>
</tr>
<tr>
<td>Number of children</td>
<td>0.84</td>
<td>1.10</td>
</tr>
<tr>
<td>Plan children</td>
<td>2.13</td>
<td>1.13</td>
</tr>
<tr>
<td>Happiness</td>
<td>7.19</td>
<td>1.95</td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>6.63</td>
<td>2.23</td>
</tr>
<tr>
<td>Health</td>
<td>3.91</td>
<td>0.80</td>
</tr>
<tr>
<td>Social network</td>
<td>5.07</td>
<td>1.51</td>
</tr>
<tr>
<td>(Country)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Development Index</td>
<td>0.85</td>
<td>0.05</td>
</tr>
<tr>
<td>Gender Inequality Index</td>
<td>0.16</td>
<td>0.08</td>
</tr>
<tr>
<td>Southern country</td>
<td>21.19</td>
<td>N.A.</td>
</tr>
</tbody>
</table>

Note: Variables are mean-centered in the analysis.

Table 3 presents correlations between subjective and objective well-being factors on the one hand and fertility intentions on the other hand. Small (Pearson scores 0.11 and 0.07, respectively) but significant correlations exist between two types of subjective well-being factors - happiness and life satisfaction - and fertility intentions. Even though the Pearson scores are low, this means that, in line with our hypothesis, the higher the level of subjective well-being, the higher the desired fertility level. When studying the correlation between an objective well-being factor (like social networks) and fertility intentions, a smaller but significant correlation is found (Pearson score 0.01). As expected, a significant negative (Pearson score -0.26) correlation exists between the number of children and fertility intentions meaning that the desired fertility level decreases as the parity increases. This finding is also observed for age (Pearson score -0.13). Cross-national differences are observed concerning the significance level and the Pearson score for these four correlations as shown in Table 3.
### Table 3  Mean value of fertility intention, correlations between subjective well-being, number of children and fertility intention, N=8178 weighted sample.

<table>
<thead>
<tr>
<th>Country</th>
<th>Mean fertility intention (SE)</th>
<th>Happiness * intention (SE)</th>
<th>Life satisfaction * intention (SE)</th>
<th>Social network * intention (SE)</th>
<th>Age * intention (SE)</th>
<th>Age² * intention (SE)</th>
<th>Number children * intention (SE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All countries</td>
<td>2.13(0.02)</td>
<td>0.11(0.01)***</td>
<td>0.07(0.01)***</td>
<td>0.01(0.01)</td>
<td>-0.13(0.01)***</td>
<td>-0.21(0.01)***</td>
<td>-0.26(0.01)***</td>
</tr>
<tr>
<td>BE</td>
<td>2.14(0.07)</td>
<td>-0.02(0.06)</td>
<td>0.05(0.06)</td>
<td>0.05(0.06)</td>
<td>-0.18(0.06)***</td>
<td>-0.33(0.06)***</td>
<td>-0.37(0.06)***</td>
</tr>
<tr>
<td>BG</td>
<td>2.03(0.07)</td>
<td>0.13(0.06)*</td>
<td>0.16(0.06)**</td>
<td>0.10(0.06)*</td>
<td>-0.35(0.06)***</td>
<td>-0.15(0.06)*</td>
<td>-0.46(0.06)***</td>
</tr>
<tr>
<td>CH</td>
<td>2.28(0.09)</td>
<td>0.02(0.08)</td>
<td>0.08(0.08)</td>
<td>-0.02(0.08)</td>
<td>0.09(0.08)</td>
<td>-0.30(0.08)***</td>
<td>-0.12(0.08)</td>
</tr>
<tr>
<td>CY</td>
<td>2.15(0.09)</td>
<td>0.05(0.08)</td>
<td>0.16(0.08)*</td>
<td>-0.04(0.08)</td>
<td>-0.05(0.07)</td>
<td>-0.32(0.08)***</td>
<td>-0.08(0.08)</td>
</tr>
<tr>
<td>CZ</td>
<td>2.18(0.06)</td>
<td>0.10(0.05)*</td>
<td>0.06(0.06)</td>
<td>-0.06(0.07)</td>
<td>-0.08(0.06)</td>
<td>-0.31(0.05)***</td>
<td>-0.29(0.06)***</td>
</tr>
<tr>
<td>DE</td>
<td>1.99(0.06)</td>
<td>0.11(0.05)*</td>
<td>0.13(0.05)**</td>
<td>-0.07(0.05)</td>
<td>-0.04(0.05)</td>
<td>-0.26(0.05)***</td>
<td>-0.26(0.05)***</td>
</tr>
<tr>
<td>DK</td>
<td>2.10(0.09)</td>
<td>0.001(0.07)</td>
<td>-0.07(0.07)</td>
<td>0.13(0.07)*</td>
<td>-0.13(0.08)***</td>
<td>-0.33(0.08)***</td>
<td>-0.25(0.07)***</td>
</tr>
<tr>
<td>EE</td>
<td>2.11(0.06)</td>
<td>0.21(0.06)**</td>
<td>0.18(0.06)**</td>
<td>0.02(0.06)</td>
<td>-0.01(0.06)</td>
<td>-0.28(0.06)***</td>
<td>-0.30(0.06)***</td>
</tr>
<tr>
<td>ES</td>
<td>2.00(0.06)</td>
<td>0.03(0.06)</td>
<td>0.01(0.06)</td>
<td>-0.08(0.06)</td>
<td>0.18(0.05)**</td>
<td>-0.31(0.06)***</td>
<td>-0.14(0.06)*</td>
</tr>
<tr>
<td>FI</td>
<td>2.27(0.06)</td>
<td>0.14(0.06)*</td>
<td>0.14(0.06)*</td>
<td>-0.004(0.06)</td>
<td>-0.04(0.06)</td>
<td>-0.28(0.06)***</td>
<td>-0.10(0.06)</td>
</tr>
<tr>
<td>FR</td>
<td>2.25(0.08)</td>
<td>0.09(0.06)</td>
<td>-0.02(0.06)</td>
<td>-0.09(0.06)</td>
<td>-0.13(0.06)*</td>
<td>-0.38(0.06)***</td>
<td>-0.33(0.06)***</td>
</tr>
<tr>
<td>GB</td>
<td>2.07(0.07)</td>
<td>0.23(0.05)***</td>
<td>0.08(0.06)</td>
<td>0.07(0.05)</td>
<td>-0.15(0.06)*</td>
<td>-0.18(0.06)***</td>
<td>-0.27(0.06)***</td>
</tr>
<tr>
<td>GR</td>
<td>1.98(0.05)</td>
<td>0.08(0.05)^</td>
<td>0.08(0.05)^</td>
<td>0.03(0.05)</td>
<td>0.03(0.05)</td>
<td>-0.30(0.04)***</td>
<td>-0.25(0.05)***</td>
</tr>
<tr>
<td>HR</td>
<td>1.99(0.06)</td>
<td>0.10(0.07)</td>
<td>0.11(0.07)</td>
<td>0.06(0.07)</td>
<td>-0.09(0.06)</td>
<td>-0.14(0.07)*</td>
<td>-0.23(0.07)^*</td>
</tr>
<tr>
<td>HU</td>
<td>2.04(0.08)</td>
<td>0.13(0.06)*</td>
<td>0.16(0.06)**</td>
<td>0.12(0.06)*</td>
<td>-0.14(0.06)*</td>
<td>-0.29(0.06)***</td>
<td>-0.28(0.06)***</td>
</tr>
<tr>
<td>IE</td>
<td>1.81(0.05)</td>
<td>0.12(0.05)**</td>
<td>0.11(0.05)*</td>
<td>-0.02(0.05)</td>
<td>0.08(0.05)*</td>
<td>-0.30(0.05)***</td>
<td>-0.13(0.05)**</td>
</tr>
<tr>
<td>IL</td>
<td>2.58(0.07)</td>
<td>0.14(0.05)**</td>
<td>0.14(0.05)**</td>
<td>-0.08(0.05)*</td>
<td>-0.05(0.05)</td>
<td>-0.30(0.05)***</td>
<td>-0.07(0.05)</td>
</tr>
<tr>
<td>LT</td>
<td>1.86(0.07)</td>
<td>0.32(0.08)**</td>
<td>0.29(0.07)**</td>
<td>0.22(0.09)*</td>
<td>-0.27(0.08)**</td>
<td>-0.10(0.07)</td>
<td>-0.44(0.07)***</td>
</tr>
<tr>
<td>NL</td>
<td>2.17(0.08)</td>
<td>0.06(0.06)</td>
<td>0.10(0.06)^</td>
<td>-0.02(0.06)</td>
<td>-0.07(0.06)</td>
<td>-0.38(0.06)***</td>
<td>-0.37(0.07)***</td>
</tr>
<tr>
<td>NO</td>
<td>2.11(0.07)</td>
<td>0.18(0.07)*</td>
<td>0.18(0.07)*</td>
<td>-0.11(0.07)</td>
<td>-0.15(0.07)*</td>
<td>-0.25(0.07)***</td>
<td>-0.36(0.07)***</td>
</tr>
<tr>
<td>PL</td>
<td>2.12(0.06)</td>
<td>0.16(0.06)**</td>
<td>0.13(0.06)*</td>
<td>0.09(0.06)</td>
<td>-0.22(0.06)**</td>
<td>-0.24(0.06)**</td>
<td>-0.31(0.06)***</td>
</tr>
<tr>
<td>PT</td>
<td>1.93(0.06)</td>
<td>0.15(0.07)*</td>
<td>0.09(0.06)</td>
<td>-0.06(0.06)</td>
<td>-0.03(0.07)</td>
<td>-0.26(0.07)**</td>
<td>-0.08(0.06)</td>
</tr>
<tr>
<td>RU</td>
<td>2.22(0.06)</td>
<td>0.13(0.05)*</td>
<td>0.13(0.05)**</td>
<td>0.03(0.05)</td>
<td>-0.24(0.06)**</td>
<td>-0.13(0.05)**</td>
<td>-0.26(0.05)***</td>
</tr>
<tr>
<td>SE</td>
<td>2.25(0.08)</td>
<td>0.09(0.07)</td>
<td>0.08(0.07)</td>
<td>0.07(0.07)</td>
<td>-0.09(0.07)</td>
<td>-0.41(0.07)***</td>
<td>-0.36(0.07)***</td>
</tr>
<tr>
<td>SI</td>
<td>2.19(0.08)</td>
<td>0.01(0.07)</td>
<td>-0.06(0.07)</td>
<td>0.10(0.08)</td>
<td>-0.08(0.07)</td>
<td>-0.37(0.07)***</td>
<td>-0.35(0.07)***</td>
</tr>
<tr>
<td>SK</td>
<td>2.07(0.07)</td>
<td>0.12(0.06)*</td>
<td>0.15(0.07)*</td>
<td>-0.07(0.06)</td>
<td>-0.02(0.06)</td>
<td>-0.36(0.06)***</td>
<td>-0.28(0.06)***</td>
</tr>
<tr>
<td>UA</td>
<td>2.07(0.09)</td>
<td>0.03(0.06)</td>
<td>0.01(0.08)</td>
<td>0.01(0.06)</td>
<td>-0.29(0.06)***</td>
<td>0.01(0.07)</td>
<td>-0.37(0.08)***</td>
</tr>
</tbody>
</table>

Note: ^p<.1; *p<.05; **p<.01; ***p<.0001.
Shifting our attention to the model results (Table 4–6), we first run the model for all parities and ages (Table 4), then parity by parity (i.e. no child, one child, second child and more) (Table 5), and then by age group (20–29 years, and 30–39 years) (Table 6). Overall, and as expected, results differ substantially across parities and age groups, highlighting life course effects.

With respect to the following models, our first results show that both objective well-being factors and subjective well-being factors produce significant effects while country-level well-being factors do not. Significant results are found for being employed and partnership (i.e. consensual union) (model 3 and 5), and for happiness (model 2 and 5). A negative effect on fertility intentions is observed for parity (i.e. number of children) and age. As for the controlling variables, a positive effect is observed for the presence of a small child (i.e. the age of the last child is below 3 years) while a negative one is observed for children living outside the home although the effect is not significant. Overall, subjective, objective and country-level well-being factors show mostly consistent results, except for health effects, between the restricted (model 2) and full models (model 5).

The following step is to examine the effects of age and parity specifically. We begin our discussion with childless women. Like for women of all parities and ages together, overall, well-being affects fertility intentions. Positive effects are observed for objective well-being factors like education, employment and partnership (i.e. being in consensual union). An effect is observed for one subjective well-being item (i.e. happiness) in model 2 and 5. In the next step, comprising model 4, when only country effects are included in the model, a negative effect is found for being a Southern country, which was not observed in the previous model for all women.

Moving to the next step of studying mothers with one child, we observe once more the overall positive effect of well-being on fertility intentions. While country effects are not significant in this specification, both subjective factors and some objective factors impact upon fertility intentions. In the second model, which concerns subjective well-being factors, for instance, positive effects are observed for happiness and also health, effects that are partially observed for childless women. In the third model, which includes objective well-being factors, significant but small effects are observed for education while the employment effect disappears. A positive effect is observed for the presence of a small child at home. In the full model of both individual and country effects, the findings on individual socio-economic characteristics are by and large consistent with those of models 2 and 3. Once again, no country effects are found (model 4 and 5).

The following findings concern mothers with at least two children, i.e. high parity women. The overall positive effect of well-being on fertility intentions is once again observed. Here as well, more positive effects are observed for the subjective well-being factor happiness but not for health. However, the role of employment
Table 4  Estimates from multi-level regression dichotomous outcome models of well-being on fertility intentions, 27 countries, by all parity aged 20–39 years.

<table>
<thead>
<tr>
<th></th>
<th>Model 1</th>
<th>Model 2</th>
<th>Model 3</th>
<th>Model 4</th>
<th>Model 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>8,178</td>
<td>8,178</td>
<td>8,178</td>
<td>8,178</td>
<td>8,178</td>
</tr>
<tr>
<td>(Individual level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intercept</td>
<td>-0.559***</td>
<td>-0.185*</td>
<td>-1.871</td>
<td>-0.556***</td>
<td>-1.795</td>
</tr>
<tr>
<td>Number of children</td>
<td>-0.833***</td>
<td>-1.012***</td>
<td>-1.029***</td>
<td>-0.198***</td>
<td>0.094**</td>
</tr>
<tr>
<td>Age</td>
<td>-0.011^</td>
<td>-0.044***</td>
<td>-0.040***</td>
<td>-0.018***</td>
<td>0.068^</td>
</tr>
<tr>
<td>Age²</td>
<td>-0.020***</td>
<td>-0.018***</td>
<td>-0.018***</td>
<td>0.094**</td>
<td>0.036</td>
</tr>
<tr>
<td>Happiness</td>
<td>0.120***</td>
<td>0.019</td>
<td>0.018</td>
<td>0.022</td>
<td>0.024</td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>-0.013</td>
<td>0.018</td>
<td>0.018</td>
<td>0.022</td>
<td>0.019</td>
</tr>
<tr>
<td>Health</td>
<td>0.044</td>
<td>0.018</td>
<td>0.018</td>
<td>0.022</td>
<td>0.019</td>
</tr>
<tr>
<td>Education</td>
<td>0.019</td>
<td>0.020</td>
<td>0.020</td>
<td>0.007</td>
<td>0.020</td>
</tr>
<tr>
<td>Employed</td>
<td>0.135^</td>
<td>0.067</td>
<td>0.116^</td>
<td>0.068</td>
<td>1.181</td>
</tr>
<tr>
<td>Single</td>
<td>0.797</td>
<td>1.181</td>
<td>0.769</td>
<td>1.184</td>
<td>0.769</td>
</tr>
<tr>
<td>Consensual union</td>
<td>2.052^</td>
<td>1.169</td>
<td>1.995^</td>
<td>1.168</td>
<td>1.995</td>
</tr>
<tr>
<td>Divorced</td>
<td>0.639</td>
<td>1.193</td>
<td>0.660</td>
<td>1.194</td>
<td>0.660</td>
</tr>
<tr>
<td>Social network</td>
<td>0.023</td>
<td>0.019</td>
<td>0.001</td>
<td>0.020</td>
<td>0.020</td>
</tr>
<tr>
<td>Child living outside home</td>
<td>-0.040</td>
<td>-1.131</td>
<td>-1.125</td>
<td>0.252</td>
<td>0.252</td>
</tr>
<tr>
<td>Small child living at home</td>
<td>0.391***</td>
<td>0.259**</td>
<td>0.227**</td>
<td>0.081</td>
<td>0.081</td>
</tr>
<tr>
<td>(Country level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HDI</td>
<td>1.987</td>
<td>1.921</td>
<td>3.680</td>
<td>2.677</td>
<td>2.677</td>
</tr>
<tr>
<td>GII</td>
<td>0.923</td>
<td>1.271</td>
<td>2.676</td>
<td>1.768</td>
<td>1.768</td>
</tr>
<tr>
<td>Southern country</td>
<td>0.023</td>
<td>0.135</td>
<td>0.031</td>
<td>0.191</td>
<td>0.191</td>
</tr>
<tr>
<td>-2LL</td>
<td>11,259,249</td>
<td>9,969,256</td>
<td>9,569,578</td>
<td>11,257,859</td>
<td>9,524,017</td>
</tr>
<tr>
<td>Variance level 2 intercept</td>
<td>0.037</td>
<td>0.019</td>
<td>0.097**</td>
<td>0.038</td>
<td>0.034*</td>
</tr>
</tbody>
</table>

Notes: ^p<.1; *p<.05; **p<.01 ***p<.001; -2LL=likelihood ratios; ICC = 0.026 in full model. Values based on SAS PROC GLIMMIX; Estimation Method = Laplace.
not observed before in the parity one sample appears. Results for both education and being employed produce negative effects, a fact that deserves attention. Further, unlike what is being expected, country effects (HDI) are considered relevant in model 4 and 5. This means that, in addition to individual subjective and objective items, country effects are important to understand the fertility intentions of high parity mothers. It is essential to understand that these women already experienced childbearing and childrearing activities, and that mothers who aim for higher parity will most likely be determined more by contextual (country) ones than the individual characteristics. While we expected that subjective individual well-being will have an increasing effect on fertility intention, the results show that in addition to country level well-being, objective individual level well-being plays an equally strong role in the fertility intention.

The role that individual well-being factors play in the determination of fertility intentions also differs by age. We focus first on the young age group. Examining the analysis of age group 20–29, positive effects are found for objective well-being (i.e. education and employment). For the highest age group of 30–39, well-being takes on more importance compared to the age group 20–29. Subjective well-being factors are important (i.e. happiness and health) and so are objective well-being factors like education and employment. The presence of a small child at home has negative effects on fertility intention in this age group. Although it was not in line with our expectation, all items on country effects are found in models 4 and 5.

Summarising all of the above it can be said that objective well-being factors produce stronger effects than subjective well-being factors, while country-level well-being factors produce limited effects although the highest age and parity groups have significant impacts on fertility intentions. Among objective well-being factors, employment produces stronger effects than education, while social networks play a limited role. It is interesting to observe that education positively influences intentions at all parities - this positive effect is greatest among old-aged (30-39) women - but is negative for high-parity women. These life course parity-specific effects are also found for employment status, as positive effects are found for childless women and negative effects for high parity (2+) women. Among subjective well-being factors, happiness and to some extent health, play a stronger role than life satisfaction. As the life course progresses, i.e. as age and parity increase, we observe the gradual strengthening of the role of subjective and objective as well as country level well-being factors.

Our analysis also sheds light on methodological issues discussed earlier. First, overall, our results show the importance of taking into account non-response bias (i.e. unit and item non-response) by including a combination of population size and non-response weights in the analysis, as model results with missing values and without weights show different results. The model results are different, changing
Table 5  Estimates from multi-level regression dichotomous outcome models of well-being on fertility intentions, 27 countries, by parity.

<table>
<thead>
<tr>
<th>Parity 0 N=3,919</th>
<th>Model 1</th>
<th>Model 2</th>
<th>Model 3</th>
<th>Model 4</th>
<th>Model 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Estimate</td>
<td>Std Err</td>
<td>Estimate</td>
<td>Std Err</td>
<td>Estimate</td>
</tr>
<tr>
<td>(Individual level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intercept</td>
<td>-0.217 ** 0.069</td>
<td>-0.221** 0.071</td>
<td>-2.126 1.506</td>
<td>-0.162* 0.068</td>
<td>-2.152 1.552</td>
</tr>
<tr>
<td>Happiness</td>
<td>0.120** 0.028</td>
<td>0.103** 0.030</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>-0.030 0.023</td>
<td>-0.037 0.025</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health</td>
<td>-0.041 0.044</td>
<td>0.011 0.049</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>0.104*** 0.025</td>
<td>0.092** 0.025</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>0.528*** 0.086</td>
<td>0.530*** 0.086</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>1.055 1.497</td>
<td>1.114 1.543</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consensual union</td>
<td>2.640^ 1.495</td>
<td>2.690^ 1.539</td>
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<td></td>
</tr>
<tr>
<td>Divorced</td>
<td>1.407 1.493</td>
<td>1.521 1.542</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social network</td>
<td>0.018 0.033</td>
<td>-0.002 0.034</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Child living outside home</td>
<td>-0.067 0.224</td>
<td>-0.420 0.246</td>
<td>-0.414 0.248</td>
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<td></td>
</tr>
<tr>
<td>(Country level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HDI</td>
<td>-0.053 2.217</td>
<td>-0.609 2.423</td>
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</tr>
<tr>
<td>GII</td>
<td>0.787 1.480</td>
<td>1.664 1.633</td>
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<td></td>
</tr>
<tr>
<td>Southern country</td>
<td>-0.258^ 0.155</td>
<td>-0.144 0.169</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-2LL</td>
<td>5,874.002</td>
<td>5,836.587</td>
<td>5,236.942</td>
<td>5,869.804</td>
<td>5,208.837</td>
</tr>
<tr>
<td>Variance level 2 intercept</td>
<td>0.057 0.025</td>
<td>0.063* 0.027</td>
<td>0.068* 0.030</td>
<td>0.033* 0.019</td>
<td>0.037^ 0.021</td>
</tr>
<tr>
<td>Parity 1 N=1,826</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>(Individual level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intercept</td>
<td>-0.131 0.110</td>
<td>-0.479*** 0.106</td>
<td>-0.948 2.127</td>
<td>-0.105 0.107</td>
<td>-0.821 2.131</td>
</tr>
<tr>
<td>Happiness</td>
<td>0.088* 0.037</td>
<td>0.057 0.040</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>-0.001 0.033</td>
<td>-0.019 0.035</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health</td>
<td>0.168* 0.078</td>
<td>0.190* 0.082</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>0.096** 0.035</td>
<td>0.096** 0.035</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>0.048 0.125</td>
<td>0.028 0.125</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>-0.342 2.146</td>
<td>-0.356 2.147</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consensual union</td>
<td>0.701 2.126</td>
<td>0.678 2.129</td>
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</tr>
<tr>
<td>Divorced</td>
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<td>2.161</td>
<td>-0.986</td>
<td>2.165</td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td>---------</td>
<td>--------</td>
<td>---------</td>
<td>--------</td>
<td></td>
</tr>
<tr>
<td>Social network</td>
<td>-0.005</td>
<td>0.039</td>
<td>-0.022</td>
<td>0.040</td>
<td></td>
</tr>
<tr>
<td>Child living outside home</td>
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<td>75.601</td>
<td>-5.928</td>
<td>69.442</td>
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</tr>
<tr>
<td>Small child at home</td>
<td>0.627***</td>
<td>0.107</td>
<td>0.617***</td>
<td>0.124</td>
<td></td>
</tr>
<tr>
<td>(Country level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HDI</td>
<td>4.506</td>
<td>3.721</td>
<td>4.073</td>
<td>3.674</td>
<td></td>
</tr>
<tr>
<td>GII</td>
<td>0.166</td>
<td>2.414</td>
<td>0.905</td>
<td>2.307</td>
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</tr>
<tr>
<td>Southern country</td>
<td>-0.063</td>
<td>0.261</td>
<td>-0.200</td>
<td>0.245</td>
<td></td>
</tr>
<tr>
<td>-2LL</td>
<td>2,795.272</td>
<td>2,711.136</td>
<td>2,588.807</td>
<td>2,788.561</td>
<td>2,569.186</td>
</tr>
<tr>
<td>Variance level 2 intercept</td>
<td>0.139</td>
<td>0.072</td>
<td>0.067^</td>
<td>0.045</td>
<td></td>
</tr>
<tr>
<td>Parity 2+ N=2,433</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>(Individual level)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intercept</td>
<td>-1.860***</td>
<td>0.145</td>
<td>-2.004***</td>
<td>0.162</td>
<td></td>
</tr>
<tr>
<td>Happiness</td>
<td>0.192**</td>
<td>0.054</td>
<td>0.180**</td>
<td>0.054</td>
<td></td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>-0.022</td>
<td>0.038</td>
<td>-0.019</td>
<td>0.038</td>
<td></td>
</tr>
<tr>
<td>Health</td>
<td>-0.075</td>
<td>0.088</td>
<td>-0.039</td>
<td>0.089</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>-0.097*</td>
<td>0.046</td>
<td>-0.104*</td>
<td>0.046</td>
<td></td>
</tr>
<tr>
<td>Employed</td>
<td>-0.392**</td>
<td>0.150</td>
<td>-0.378*</td>
<td>0.153</td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>-0.155</td>
<td>2.237</td>
<td>0.065</td>
<td>2.277</td>
<td></td>
</tr>
<tr>
<td>Consensual union</td>
<td>0.593</td>
<td>2.219</td>
<td>0.595</td>
<td>2.257</td>
<td></td>
</tr>
<tr>
<td>Divorced</td>
<td>-0.303</td>
<td>2.265</td>
<td>-0.153</td>
<td>2.306</td>
<td></td>
</tr>
<tr>
<td>Social network</td>
<td>-0.016</td>
<td>0.051</td>
<td>-0.044</td>
<td>0.051</td>
<td></td>
</tr>
<tr>
<td>Child living outside home</td>
<td>8.174</td>
<td>128.979</td>
<td>8.498</td>
<td>135.337</td>
<td></td>
</tr>
<tr>
<td>Small child at home</td>
<td>0.176</td>
<td>0.134</td>
<td>0.090</td>
<td>0.139</td>
<td></td>
</tr>
<tr>
<td>(Country level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HDI</td>
<td>11.704*</td>
<td>4.612</td>
<td>11.417*</td>
<td>4.992</td>
<td></td>
</tr>
<tr>
<td>GII</td>
<td>5.596^</td>
<td>2.966</td>
<td>5.841^</td>
<td>3.206</td>
<td></td>
</tr>
<tr>
<td>Southern country</td>
<td>0.461</td>
<td>0.307</td>
<td>0.445</td>
<td>0.328</td>
<td></td>
</tr>
<tr>
<td>-2LL</td>
<td>1,777.801</td>
<td>1,748.306</td>
<td>1,740.124</td>
<td>1,769.278</td>
<td>1,710.270</td>
</tr>
<tr>
<td>Variance level 2 intercept</td>
<td>0.286</td>
<td>0.127</td>
<td>0.276*</td>
<td>0.124</td>
<td></td>
</tr>
</tbody>
</table>

Notes: *p<.1; **p<.05; ***p<.01; ****p<.001; -2LL=likelihood ratios. ICC in full model parity 0 is 0.01, parity 1 is 0.02 and parity 2 is 0.05. Values based on SAS PROC GLIMMIX; Estimation Method = Laplace.
Table 6  Estimates from multi-level regression dichotomous outcome models of well-being on fertility intentions, 27 countries, by age groups.

<table>
<thead>
<tr>
<th>Age 20-29 years N=3,761</th>
<th>Model 1</th>
<th>Model 2</th>
<th>Model 3</th>
<th>Model 4</th>
<th>Model 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Estimate</td>
<td>Std Err</td>
<td>Estimate</td>
<td>Std Err</td>
<td>Estimate</td>
</tr>
<tr>
<td>(Individual level)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intercept</td>
<td>-0.397***</td>
<td>0.080</td>
<td>-0.382***</td>
<td>0.085</td>
<td>-3.001</td>
</tr>
<tr>
<td>Happiness</td>
<td>0.098**</td>
<td>0.027</td>
<td></td>
<td></td>
<td>0.064*</td>
</tr>
<tr>
<td>Life satisfaction</td>
<td>-0.009</td>
<td>0.023</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>0.060*</td>
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<tr>
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</tr>
<tr>
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<tr>
<td>(Country level)</td>
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<tr>
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<td>-2LL</td>
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<tr>
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<td>0.042</td>
<td>0.097**</td>
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</table>

Age 30-39 years N=4,417

<p>| (Individual level)       |         |         |         |         |         |         |         |         |         |         |
| Intercept                | -0.758***| 0.079   | -0.672***| 0.071  | -1.038 | 1.268   | -0.811***| 0.048  | -1.145 | 1.260   |
| Happiness                | 0.068**  | 0.026   |         |         | 0.058* | 0.027   |         |         |         |         |
| Life satisfaction        | 0.013    | 0.023   |         |         | -0.014 | 0.024   |         |         |         |         |
| Health                   | 0.181**  | 0.052   |         |         | 0.109* | 0.052   |         |         |         |         |
| Education                | 0.210*** | 0.024   |         |         | 0.201***| 0.022  |         |         |         |         |</p>
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<th>0.086</th>
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<tbody>
<tr>
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<td>-0.325**</td>
<td>0.096</td>
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</tr>
<tr>
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<td>1.970</td>
<td>7.379**</td>
<td>2.098</td>
</tr>
<tr>
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<td>1.169</td>
<td>2.090^</td>
<td>1.204</td>
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<tr>
<td>Southern country</td>
<td>0.306*</td>
<td>0.123</td>
<td>0.305**</td>
<td>0.118</td>
</tr>
</tbody>
</table>

-2LL                  | 5,101.425 | 5,046.923 | 4,923.112 | 5,078.166 | 4,882.351 |

Variance level 2 intercept | 0.092 | 0.041 | 0.055* | 0.030 | 0.127** | 0.051 | 0.008 | 0.009 | 0.004* | 0.003 |

Notes: ^p<.1; *p<.05; **p<.01 ***p<.001; -2LL=likelihood ratios. ICC in age 20-29 is 0.02, and age 30-39 is 0.001.
Values based on SAS PROC GLIMMIX; Estimation Method = Laplace.
the number of significant effects and coefficient levels. We consider that working on the basis of a comparable sample (Billiet, 2013) including both population size and (standardized) non-response weights – based on population-based age, gender and educational level – is a necessary condition. Second, while including both individual and country-level measures capturing similar concepts concerning societal progress and well-being, our analysis demonstrates a somewhat small intra-class correlation, although model fit substantially improves in the full model. Country-level measures, namely Human Development Index (HDI), Gender inequality index (GII) and region (Southern countries) produced significant effects for women at high ages and parities. Questions remain, however, as to whether similar concepts such as employment/education and HDI/GII present in a different level (e.g. level-1 and level-2) can be modelled together.

5. CONCLUSION AND DISCUSSION

Against a background of persistent low and lowest-low fertility in Europe, and considering the attention increasingly being paid in the literature to the concept of well-being, the focus of this paper was on the role of well-being in the determination of fertility intentions. Fertility intentions are important since they can be taken as strong predictors of actual fertility behaviour in accordance with the theory of planned behaviour and in accordance with empirical results reported in the literature. ‘Perceived behavioural control’ is defined as the individual’s perception of his/her ability to adopt certain behaviour. Individuals are highly dependent on their individual socio-background but also on their beliefs, attitudes and norms, which are highly dependent on the contextual conditions governing their individual lives. The more the adoption of certain behaviour is perceived as easy by the individual, also indicated by higher well-being status, the higher the likelihood of the intention resulting in actual behaviour. Specifically for childbearing and childrearing, the more societies ensure that these activities are perceived as easy to undertake, the higher the fertility intentions and achievements. The opposite is true for low fertility intention countries.

The objective of the paper was to study the impact of well-being on fertility intentions among European population. Considering that fertility intentions are proxies of actual fertility behaviour, and since women and couples are increasingly planning their fertility behaviour given the use of effective contraception, we have constructed a micro-macro theoretical framework (Coleman, 1990) that incorporates Ajzen’s theory of planned behaviour (1991) and Giele and Elder’s life course theory (1998). Paying attention to the multi-dimensionality of well-being, a broad approach was taken in this paper to the concept of well-being through the consideration of individual-level subjective well-being factors, individual-level
objective well-being factors, and country-level well-being factors. The latter were included in accordance with Coleman’s methodological individualist micro-macro framework. In accordance with life course theory, the impact of well-being factors on fertility intentions was analysed for all women, and then by parity (childless; one child; two and more children) and by age group (age 20–29 years; age 30–39 years).

We asked three main questions in this paper: i. Does overall well-being influence fertility intentions?; ii. What kind of well-being factors are more important in the determination of fertility intentions (individual-level subjective ones vs. individual-level objective ones vs. country-level ones)?; iii. Does the role of specific well-being variables change in the course of one’s life course, i.e. as age and parity progress? A range of analyses, including by age and parity, were applied to data for women aged 20–39 in 27 countries taken from the European Social Survey Round 5 (2010a/b) family, work and well-being module. The analysis of a comparable sample across countries was made possible by imputing missing values and using combined weights correcting potential bias.

Overall, some results are in line with our hypotheses, and some are not. Well-being plays a significant role in the determination of fertility intentions. Objective well-being factors produce stronger effects than subjective well-being factors, while country-level well-being factors produce somewhat limited effects. These findings, particularly those concerning country-level effects, should be treated with caution, however, as they may impact more indirectly than directly on fertility intentions, influencing the extent to which policies and programmes are family friendly. Our analysis shows that country factors are important for higher fertility intentions when women are at higher age and parities. Among objective well-being factors, employment produces stronger effects than education while social networks play a rather limited role. Among subjective well-being factors, happiness plays a stronger role than health and life satisfaction. Across the life course, i.e. as age and parity increases, we generally observe a strengthening role for individual level subjective and objective well-being factors as well as country level well-being factors.

Analysing the role of subjective and objective well-being factors in fertility intentions through cross-national surveys has both advantages and disadvantages. ESS contains much well-being information in line with the multi-dimensional approach taken in this paper, notably through the inclusion of a specific module on family, work and well-being. ESS also takes a rigorous approach towards quality. And further, ESS gathers data for a large number of European countries (27 countries for our analysis), allowing researchers to gain a comparative understanding of important attitudes and behaviours. The wide range of country measures in ESS supports efforts to conduct cross-national analysis. The main challenge is the correction for non-response bias and for non-equivalence of
measurement across countries. This condition depends on the level of survey errors (i.e. total survey error, Biemer 2010) that are equally dependent on country specificity which are detailed documented (ESS, 2010b). Different response rates (i.e. deviation of more than 30 percent), different levels of response qualities (i.e. proportion item non-response) and equivalent construct measures in the survey items (i.e. loading of factors initially tested on self-reported well-being items) are at least identified in the initial explorative analysis. An attempt is made to minimize these errors through corrections in our analysis making it possible to draw important conclusions.

The current findings call for further analysis and reflection. Our results show that fertility intention determinants are largely dependent on individual level objective well-being characteristics particularly related to education and employment status. The fact that more and more women opt for higher education and wish to be employed, calls for more attention to be paid to creating an enabling environment for childbearing and childrearing activities for women and couples (OECD, 2007). The fact that effects for societal indicators and region are found for high age and parity women, suggest that the existing institutional arrangements including norms and values matter more when women opt to have children at higher age and/or when they intend to have more children. It should also be noted that the survey design and its analysis may also play a role here. The current survey design of ESS lacks retrospective information and longitudinal data (with repeated measurements among the same respondents). And finally, the fertility intentions should be additionally studied from male’s perspective as childbearing and childrearing activities are, in most cases, jointly done by couples.

NOTES


2 Intraclass correlation can be defined as follows:

\[ \rho_I = \frac{\text{population variance between macro-units}}{\text{total variance}} = \frac{\tau^2}{\tau^2 + \sigma^2} \]

where population variance represents \( \tau^2 \) and \( \sigma^2 \) represents within group variance (Snijders and Bosker, 1999, 17-19). Since the logistic distribution for the level-one residual has a variance of 3.29 (=\( \pi^2/3 \)), for a two-level logistic random intercept model with an intercept variance of \( \tau_0^2 \), the intraclass correlation is calculated as follows (ibid. 17-23, 304-305): \( \rho_I = \frac{\tau_0^2}{\tau_0^2 + \frac{\pi^2}{3}} \).

3 The choice of number of imputed data sets (5) is justified by the aforementioned literature, although several tests (e.g. 10, 50, and 100) are performed by reviewing the fraction of missing information and overall variance information by each item. A higher number of imputed data sets is useful from these benchmark indicators (level of variance),
although the differences between 5 imputed data sets and 10, 50, 100 imputed data sets on the actual model effects are largely not observed. We therefore decided to work with 5 imputed data sets. Also note should be made on the model selection. We included combined weights of multiplying post-stratification weights with the population size weight in the imputation model.

REFERENCES


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Koen Matthijs is full professor of Sociology and Demography at the University of Leuven (Belgium). He is head of the research group Family and Population Studies, in which he unifies historical demographic research on long-term, sociodemographic trends with contemporary sociological studies on current family structures and processes. He published widely on marriage, divorce and family forms. He is editor-in-chief of Historical Life Course Studies and a member of the Royal Flemish Academy of Belgium for Science and the Arts.
Sensitive Populations and Self-reflexive Methods: Ethnographic Exploration of Race and Racism in Poland

Sarah Grunberg
Ithaca College

Poland has witnessed a rise in cross-border migration from both within the European Union and from regions around the world. A demographic consequence is biracial families in Poland. A social consequence is that in formerly racially homogenous Poland, racial inequality evolves from a nascent stage experienced by the few to a rapidly developing institution, with biracial families caught in the middle of past and future. In this article I discuss the methodology of a research project on identity strategies of Black African men, White Polish mothers, and biracial children, and the communities that they build. These groups are sensitive populations due to the racism, xenophobia, and discrimination that they face. I discuss (a) how the oral history method can be effective when working with sensitive populations, (b) the ethical and privacy concerns that come with social network snowball sampling and maintaining the anonymity of this population, and (c) how self-reflexive methods offers an honest, straightforward, and effective approach to examine the subjects and communities of my research.

Poland has witnessed a rise in cross-border migration from both within the European Union and from regions around the world. This is due to a number of different factors, including Poland’s accession to the European Union, Poland’s convenience and attractiveness as a transition country, and globalization’s overall effect of creating selectively permeable economic, political and social borders (Górný et. al, 2010). The 2011 Polish census showed that 56.3 thousand individuals from other countries resided in Poland and out of these, 40,000 stayed for longer than 3 months. 27,000 of these individuals stayed in Poland for a minimum of 12 months, while 36,000 planned to stay in Poland for a year of more (Kostrzewa and Ształtys, 2013, p. 28). Poland saw a rise in immigrants coming from African
countries as compared to data collected in 2002 and 2011, with around 800 individuals temporarily staying in Poland in 2002, and 1,390 coming in 2011 (3.5% of all immigrants) (p. 32).

Statistically, we see that people of different races and cultures are increasingly in closer contact in Poland. A demographic consequence is a small number of biracial families in Poland. A social consequence is that in formerly racially homogenous Poland, racial inequality evolves from a nascent stage experienced by the few to a rapidly developing institution, with biracial families caught in the middle of past and future.

In this article I discuss the methodology of a research project on identity strategies of Black Africans, White Poles and biracial children and the communities that they build.\(^1\) I conducted interviews using the oral history method. To supplement interview information and collect data on the community, I used informal conversations during the course of participant observation in the places where Black African fathers, White Polish mothers, and multiracial children congregate. To find potential interviewees, and the communities of which they are a part, I used a combination of traditional snowball sampling and social media. All told, I conducted 33 in-depth interviews, and countless informal conversations in numerous events across the three Polish-African communities between 2011 and 2015.

There are three purposes to this article. First, I discuss (i) how the oral history method can be effective when working with sensitive populations and (ii) the ethical and privacy concerns that come with social network snowball sampling and maintaining the anonymity of this population. As a part of these communities, I assumed that my presence had impacted it and the data collection. I followed the anthropological tradition and recent sociological trends of self-reflexivity (Prowse, 2010; Pezzala, et al., 2012; Gouldner, 1970). Thus, the third purpose is to discuss (iii) how self-reflexive methods offers an honest, straightforward, and effective approach to examine the subjects and communities of my research.

**CHARACTERISTICS OF THE POPULATION: SENSITIVE AND HARD-TO-REACH**

The population that I analyzed has two main characteristics that influence how to approach, analyze and write about them. First, they are sensitive, meaning that they are visible and vulnerable to extreme forms of physical and verbal discrimination. Second, owing to the fact that they are sensitive, they are also hard-to-reach, meaning that they are wary of and therefore not readily accessible to social researchers. Bias, ethics, privacy and anonymity of research subjects take on a special significance with sensitive and hard-to-reach populations.
The groups of my research are sensitive populations. Because Poland does not have an extensive modern history of relations with individuals from Africa, most of the notions of the “black other” are informed by a uniquely Polish African mythology (Kłoskowska 1962; Chodubski 2005; Fereira 2002; Mol 2004). For example, “Bambo,” the still popular children’s poem about a little African boy who is afraid to bathe because it will “bleach” his “black skin”, reinforces stereotypes of Africa and those who are from African countries, “used AS fuel for insults aimed toward people with darker skin, specifically from African countries and mixed race backgrounds, in Poland (Mikulska 2011). Studies of African-Polish relations have focused on racial identities and divisions rather than national or ethnic, specifically citing problems between “whites” and “blacks”. This is due to the understanding that Africans in Poland are perceived through the prism of race (Ząbek 2009).

The Helsinki Foundation 2011 study entitled “Racism in Poland” explores racism toward immigrants and children of mixed marriages.

“Monkey,” “black monkey,” “asphalt,” “Bambo,” “gorilla” are the types of invectives that nearly all interviewees of African origin reported hearing. Individuals who stand out for their darker skin and/or are of Asian origin reported hearing insulting epithets such as “black”, “nigger” or “yellow.” Foreigners frequently hear comments that they are not welcome in Poland and should go back to their countries (Mikulska, 2011).

The increase of cross-national contacts and immigration to Poland has certainly had an influence on how race is culturally perceived. Physical difference is a marker that has not been a positive determinant of what it means to be “Polish” according to the Polish people.

To approach this population, I focused specifically on snowball sampling in hard to reach populations (Goodman, 2011) for the purpose of conducting oral history interviews. This type of snowball sampling, differs a great deal from Coleman’s (1958–1959) definition of snowball sampling in not hard to reach populations as in the case of hard to reach populations, sample frames do not exist and therefore this methodology “relies on the people in the convenience sample to select other people from the hard-to-reach population” (Goodman, 2011, p. 350). In the age of internet-based social networking, classic snowball sampling for interviewing hard-to-reach populations is no longer the default. An innovative solution may be to use online social networking sites with virtual elements such as, mutual friends, niche groups, events, discussion boards and fan pages, which provide a virtual space for snowball sampling that occurs even before initial contact.

This method has two main challenges: selection bias and maintaining privacy. Selection bias occurs when some are excluded from physical social spaces where
classic networking occurs. The inclusive nature of internet social networking can account for this, with the risk of bias toward the more privileged side of the digital divide. Privacy issues for this sensitive population are more of a challenge: I explore the ethical implications of using social networking sites, along with how privacy and information can be maintained. When it comes to in-depth interviews, I also argue that some aspects of the oral history method are fundamental in obtaining responses that could otherwise be omitted by the interviewee. Below I will give an overview of the project itself in order to illustrate the importance of these two methods when researching “sensitive” and “hard to reach” populations.

**METHODOLOGY IN THE POLISH-AFRICAN COMMUNITIES: SNOWBALL SAMPLING**

Methodologically speaking, much of the research that has been done on biracial individuals and families is quantitative in nature, and as suggested by Telles and Sue (2009) it is necessary to explore the dynamics of interracial relationships and families through qualitative and ethnographic data in order to better understand these dynamics on a micro-level rather than focusing entirely on macro-level approaches that can limit our understandings of these dynamics (p. 140).

Researchers face many challenges when it comes to studying new phenomena, such as the emergence of biracial, specifically Black African and White Polish families in Poland. Because African migration to Poland has just begun to increase, with the average migration of Africans to Poland from 2004–2008 at about 125.4, as compared to the average migration from 1999–2003 of 105.2 (GUS archives, 1999–2008), the presence of African and biracial individuals has not yet reached a point where they are an “apparent” part of Polish society both in the sense of statistical data present, and in the sense sampling frames (Goodman, 2011). In this case, the most feasible method of acquiring interviewees is through snowball sampling for hard-to-reach populations. According to Browne (2005) “Snowball sampling is often used because the population under investigation is ‘hidden’ either due to low numbers of potential participants or the sensitivity of the topic...” (p. 47). Browne explores many of the advantages and limitations of using snowball sampling in her study of non-heterosexual women. She explains that one way to use snowball sampling in gaining initial contacts is to “use personal networks and ask friends and acquaintances to be involved. They in turn ask their friends and partners if they would be willing to participate. This method avoids the problems associated with methods that rely on the categorization of groups” (Browne, 2005, p. 49).

Many other researchers also argue that the “more sensitive or threatening the phenomenon under study the more difficult sampling will be” (Faugier and Sargeant, 1997, in Browne, p. 48). It should be noted that snowball sampling in hard-to-
reach populations differs a great deal from Coleman’s (1958–1959) definition of snowball sampling in not hard to reach populations, as in the case of hard to reach populations, sample frames do not exist and therefore this methodology “relies on the people in the convenience sample to select other people from the hard-to-reach population” (Goodman, 2011, p. 350). In the age of social networking, classic snowball sampling for hard-to-reach populations is no longer the default method. Just as it has been said that “studies of sensitive subjects have employed individuals’ social networks in order to access ‘hard to reach’ and ‘sensitive’ populations (e.g. Bergeron & Senn, 1998; Eland-Goossensen, Van de Goor, Vollemans, Hendricks, & Garretsen, 1997; Sarantakos, 1998; Valentine, 1993a, 1993b, 1993c in Browne p.48), following others, I chose an innovative solution to snowball sampling through the use of online social networking sites, which act in a similar way to traditional snowball sampling but allow for much more access.

Social networking platforms such as Facebook and Afrix.org, in the case of this specific Polish-African sample, provide a virtual space for snowball sampling through such elements as mutual friends, niche groups, events, discussion boards and fan pages, where snowball sampling occurs even before initial contact. These platforms establish a starting point, or potential convenience sample, which would then select the first wave of snowball sampling (Goodman, 2011, p. 350). Social networking sites also allow for a certain amount of accessibility for the interviewee which may make the interviewee more comfortable to take part in the research study. Browne suggests that in her own research, “Being rooted in social networks was significant because participants were able to ‘check out’ the research and me both as a researcher and a person” (cf. Duncan & Edwards, 1999 in Browne, p. 50). In this way, social networking can be used as an advantage and as a means to gain access into a particular community through the interviewees’ accessibility to the researcher’s profile, mutual friends, etc.

Browne, (2005) along with many others, suggests that snowball sampling “can be seen as a biased sampling technique because it is not random and it selects individuals on the basis of social networks” (Biernacki & Waldorf, 1981; Baxter & Eyles 1997; Faugier & Sargeant, 1997 in Browne, p. 51). Social network snowball sampling has two main challenges: selection bias and maintaining privacy and anonymity. Yet, while in classic snowball sampling, selection bias may occur as many are excluded from social spaces such as sports organizations, nightclubs, and other events, the inclusive nature of internet social networking can correct for biases inherent in snowball sampling. Still, of course not all selection bias can be eliminated, as it is clear that bias will still exist toward the more privileged side of the digital divide. Browne also makes the point that “Snowball sampling (as with most sampling techniques) relies on individuals’ willingness to be involved in research and consequently some people will always be excluded” (p. 52). In the
end, selection bias will always be an issue when it comes to snowball sampling, however it is almost impossible to generate a random sample of a group of individuals who are often time “hidden” or extremely “hard to reach” for various reasons.

Privacy issues for this sensitive population are more of a challenge in using social networking sites where privacy controls are not in the researcher’s direct control. An example of this may be if a researcher searches for their sample in a specific group formulated on a social networking site. This group may be open to the public, or open to all members, and therefore interviewees can be traced back upon publishing the article (if the author names the group, or characterizes the group where they found their sample). Still, there are reasons to argue that privacy can be guaranteed in that a researcher can create a private group on a social networking site that is only visible to its members. However, privacy in its entirety cannot be guaranteed until the owner of the site guarantees it, and recently this has become an issue of major debate—if privacy is truly guaranteed on the internet. The ethical implications here are obvious in that confidentiality becomes more and more difficult to maintain when individuals become a part of online communities.

IN-DEPTH INTERVIEWS AND THE ORAL HISTORY METHOD

While snowball sampling helps to gain access to certain groups of people, the next step of the researching process is the means of data collection. In-depth interviews are a very common means of collecting qualitative data. In this study, data collection and analysis is based on in-depth interviews with elements of the oral history method. As a research assistant for Professor Lutz Niethammer, said to be “the leading practitioner of oral history in Germany” (Iggers, 1991, p. 822), I was able to master this particular method, which “is…often used to study the experience of oppression— the personal experience of being a member of an oppressed group” (Hesse-Biber, 2006, p. 157) and can also be defined as “in depth biography interviewing, typically of people who are excluded from or marginalized within conventional historical accounts” (Sarkar, 2012, p. 578). The oral history method is an intensive collaborative process of narrative building based on storytelling and listening of the interviewer and interviewee (Hesse-Biber, 2008, p.150) and allows for history to be written from “the bottom up” (Niethammer in Miller, 1981 p. 142, Luken and Vaughan, 1999, p. 404). It is a collection of personal stories and is a unique method as there can be “moments of realization, awareness, and, ideally, education and empowerment during the narrative process” (Hesse-Biber, 2006, p.150). Sarkar (2012) emphasizes the importance of the stories collected as they not only “provide new information about large-scale social processes or events... but also, more importantly, how they both bring alive and add texture to what we
think we know” (p. 595). Hesse-Biber (2006) discusses the contrast between the in-depth interview and the oral history method by stating,

When using in-depth interviews an interviewer will typically have a focused topic for the interview and will follow an interview guide which, as we saw, may be semi-structured or relatively unstructured. Interviewees may or may not be asked identical questions, depending on the design and goals of the project. Oral history interviews differ in that, while the researcher is studying a specific topic, the organization of the topic is likely to be far less focused (p. 152).

The in-depth interview method, which typically focuses on a specific topic and follows either a semi-structured or unstructured interview guide, seems to be lacking when it is not combined with certain elements of the oral history method. I consider it necessary to use a semi-structured interview guide while at the same time using aspects of the oral history approach, as the oral history method can be seen as “a critical method for understanding life experiences in a more holistic way as compared with other methods of interview. This is congruent with the tenets of qualitative research and can yield not only rich descriptive data but also knowledge about social processes” (Hesse-Biber, 2006, p. 153).

Because each member of this community has a very specific way of forming identity, this particular sample consists of interviews within biracial families and the Polish-African community. While maintaining a certain focus during the interview at distinct moments of realization, taking a holistic, life story approach allows for yielding many more explanatory statements and ideas. As Hesse-Biber (2006) explains, “Oral history allows for the merging of individual biography and historical processes. An individual’s story is narrated through memory. This means that their recollection of their experiences, and how they give meaning to those experiences, is about more than “accuracy;” it is also a process of remembering – as they remember, they filter and interpret” (p. 156). This becomes all the more important when studying identity strategies of marginalized groups of people.

**SELF-REFLEXIVE METHODS AND PARTICIPANT OBSERVATION**

As Becker (1958) notes in his paper on the “Problems of Inference and Proof in Participant Observation”, “the participant observer gathers data by participating in the daily life of the group or organization he studies” and can be used to both locate hypotheses as well as to test them (p. 652–653). My research began in 2010 and formally ended in 2013, though in the last two years I have followed-up on some of my contacts and continued to participate in the community. I have been both a participant observer at many different cultural events, community meetings, and informal gatherings, and as such I was also an active member of this community. I became known for my research goals as well as my involvement within different
groups and organizations. Because I am a part of these communities, I assume that my presence had impacted it and the data collection. Each of the groups of this study are sensitive populations and, as a social scientist, my first priority to maintain their anonymity and privacy. There are specifics of the public and private aspects of these communities that, if revealed in full, could negatively impact the prospects for the anonymity of my subjects. In order to guarantee anonymity, I sketch but do not fully render this community, and I am selective in the descriptions. Some aspects of these communities are willingly public, such as formal Polish-African conferences that the organizers and speakers hope would attract a wide audience and media attention. In all situations, however, I weigh heavily on the side of anonymity.

The Methodology of Self-Reflexive Sociology

In Goulnder’s (1970) work, *The Coming Crisis of Western Sociology*, he highlights the importance of Reflexive Sociology outside of the walls of academic discourse and instead within the understanding of sociologists’ own beliefs, lives and experiences:

> What sociologists now most require from a Reflexive Sociology, however, is not just one more specialization, not just another topic for panel meetings at professional conventions, and not just another burbling little stream of technical reports...The historical mission of a Reflexive Sociology as I conceive it, however, would be to transform the sociologist, to penetrate deeply into his daily life and work, enriching them with new sensitivities, and to raise the sociologist’s self-awareness to a new historical level .... In deepening our understanding of our own sociological selves and of our position in the world, we can, I believe, simultaneously help to produce a new breed of sociologists who can also better understand other men and their social worlds. A Reflexive Sociology means that we sociologists must-at the very least-acquire the ingrained habit of viewing our own beliefs as we now view those held by others (Gouldner, 1970, 489–90).

Reflecting and contemplating one’s own position in the world cannot, in my opinion, be separated from many of the fundamental principles of Sociology, such as understanding one’s individual experience as connected to the larger historical and social context. My own journey through this research process stemmed from a decision I made after completing my undergraduate studies in Ithaca, NY to explore what was my unfamiliar, yet familiar, “motherland”. As a child of Polish immigrants, I had felt the dual-culturality of my experience, yet I had never visited the place where this culture found its roots. I found this strange and intriguing--how could it be that I had barely looked beneath the surface of the very source that I felt was such a vital part of my identity? Perhaps I felt less social pressure to
pursue it in context because this particular facet of my identity was not immediately recognizable, and frankly, no one questioned it.

When I arrived to Poland, I also immediately became aware that there was a part of my identity, one which I had never fully explored or felt to be integral, being immediately highlighted and used as a reference point for others to make sense of me. Ethnically my Jewish roots presented as a source of identity that was more familiar and known to those around me than it was to myself. I began to wonder about the identity of individuals who experience dual-culturality in Poland, and even more so, those who presented as physically different from the majority of the population, or were easily identifiable as “others”. On a certain level, I felt that I could relate to the feelings entwined with dual cultural identity, as I had felt most of my life that I was able to experience and see a bit of both worlds. However, while I had received some comments in Poland about “looking Jewish” in a purely stereotypical sense, I was able to pass, for the most part, as Polish. Even my American accent had faded to a point where I rarely had to answer questions related to “where I was from” by the end of my stay in Poland.

I understood that others living in the country did not have this privilege to “pass”. This led me to begin asking questions about the experiences of ethnic and racial minorities in Central and Eastern Europe, focusing on two intertwined factors: community and identity. As much as I passed as Polish most of the time, Poles were quick to let me know that I was different, perhaps even in a positive sense. I had never recalled someone in the United States questioning my ethnic identity. From this point I began to understand how the racial and ethnic homogeneity of Poland influenced how individuals were categorized in terms of your identity – you were either Polish, or you were most definitely not. Reflexivity in this sense helped me understand my own experience in the context of others who could have been experiencing either something very similar or very different. This was what I was interested in exploring and has since shifted my own perspective and understanding of my place within this social and historical context. I came into the research understanding very little, and have left with a breadth of knowledge that has shaped my own identity in the process.

So began my exploration of the Polish-African community. I believe the first time I spoke to my grandmother about people of color in Poland was on the night that Barack Obama was elected into presidential office for his first term. My grandmother’s neighbor burst through the door and exclaimed in disdain, “First Jews ruled the world and now the negroes will rule”. My initial reaction was one of shock as her words so overtly expressed a type of racism that felt all too familiar. Later on, I attempted to put her words into context. My grandmother explained to me that being “different” in Poland was not easy and that many people in Poland still feared anything that was not innately Polish,
that this had to do with a long history of occupations and so on. I also came to understand that the experience of people of color in Poland was different from the experiences that I understood of people of color in the United States as Poland did not experience such a deep historical racial divide.

From this point on, I started carrying out informal conversations with ethnic Poles about Africans in Poland. Often times before and throughout my research I would hear generalizing statements and jokes such as “we are 100 years behind the negroes” (in terms of how civilized or uncivilized Poles are) or the word “murzyn” used loosely to refer to all people of color in Poland, and usually had negative connotations. I noticed that in all of my social circles, the lack of diversity that existed allowed for a comfortable space to speak about people of color in a degrading fashion. I observed what I eventually came to understand as dialogue and actions rooted in xenophobia, ignorance (perhaps due to a lack of education as well as a lack of contact with African people), curiosity, along with examples of overt racism. I began to discover early in 2010 that the history of Africans immigrating to Poland was fairly new, beginning somewhere in the late 1970s/early 1980s, and that there were not many individuals from African countries (as compared to other minority groups) living in Poland, ranging anywhere from 2,000 to just over 5,000 Africans total living in Poland. The data on these individuals was also problematic at times, The Central Statistical office not including those individuals who live in Poland on a temporary basis (those without permanent residency), which leads to the discrepancy in knowing how many individuals from African countries actually reside in Poland at a given time. However, with this said, it was apparent that the population was growing.

My research began as an informal search for stories that could help me better understand the experiences of the members of the African community in Poland. As I mentioned to some friends that this was a topic that interested me, I was introduced to a few individuals who openly shared some of their experiences. My first encounter with someone with Polish and Nigerian parents shed light on the difficulties that bi-racial Poles encounter in their everyday lives in Poland. This particular individual expressed that they encountered racism on a daily basis on a number of different levels and in various spaces. This included comments while walking down the street, problems in the workplace, as well as the constant assumption that they were a foreigner in Poland. After our conversation, I informed this individual that I may continue to research this topic, to which they agreed be interviewed in the future.

At this point I began to attend African events in order to formalize my academic interests and continue to discover the larger community in order to see how it functioned. I met many individuals with both similar and different stories, from Polish-African backgrounds as well as individuals from many African countries and
announced the topic of my dissertation during these meetings. I became involved in two organizations that advocated for migrant rights in Poland as well as a stop to racism in Poland. Soon my reputation was known among this community as both a researcher and member of the community.

CONCLUSION

In this research I specifically focus on interviews done with members of the Polish-African community in the racially homogenous Poland. Individual interviews were conducted in the language that the speaker was most competent in (either English or Polish). In conducting this research, I used a mixed method approach, snowball sampling with the use of social networking platforms, incorporating data collection and analysis is based on in-depth interviews with elements of the oral history method, informal and formal conversations, along with participant observation in the places where this community congregates. This combination is ideal for this sensitive population, specifically the in-depth interviews with elements of the oral history method which allowed for interviewees to answer difficult questions in an open and natural way. Moreover, oral history provides for detailed analysis of micro-macro processes as I can place deep personal histories in a broad historical context (Hesse-Biber 2008; Riemann 2006) and when combined with participant observation, tells a story that is vivid and multidimensional. As a part of these communities, I assumed that my presence had impacted it and the data collection. Following the anthropological tradition and new sociological trends of self-reflexivity (Prowse, 2010; Day, 2012; Gouldner, 1970), I integrated my description of the community with myself as a subject.

NOTES

1 A note on terminology: some prefer the term “multiracial”, “multiethnic” or “mixed race” to biracial, however here I focus specifically on two socially constructed racial categories – Black and White – that have strong meaning in contemporary Poland.

REFERENCES


Sarah Grunberg, Sensitive Populations and Self-reflexive Methods: Ethnographic Exploration of Race and Racism in Poland


Sarah Grunberg is a public sociologist from Ithaca, NY, a PhD Candidate at the Polish Academy of Sciences and is currently teaching at Ithaca College. Her research is on identities in the contested terrain of race, identity and inequality traversed in Poland. She is currently applying her sociological knowledge through union organizing to address inequality in higher education, specifically as related to precarious labor and the corporatization of academic institutions.
The Vanishing Lists: Collecting and Matching Parliamentary Candidate Data in Romania

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Median Research Centre Bucharest, Lucian Blaga University Sibiu

Publishing and preserving detailed information about candidates running for public office is a form of accountability and a precondition for the production of reliable academic knowledge about electoral and partisan politics. This article offers a guide to researchers interested in collecting candidate data in environments where both politicians who design and civil servants who administer the electoral process have a limited understanding of the relevance of such data and where their bureaucratic capacity is underdeveloped. It does so by focusing on the case of Romania, where no complete registry of candidatures at parliamentary elections exists and key information about the candidates running in the 1990–2000 elections seems to have been lost forever. We employ process tracing and an in-depth analysis of legal documents to reveal the causes of this outcome. The article describes how a team of researchers devised and implemented several research strategies to cope with scarce data, the various types of logistical or methodological obstacles encountered and the solutions used in order to recover data and build a new, matched dataset of Romanian parliamentary candidates.

INTRODUCTION

The lists of candidates running in parliamentary elections are not just administrative documents and their relevance does not vanish once the elections end and the elected candidates are validated. Instead, candidate lists can enable ordinary citizens, journalists, activists or academics to make informed judgments about individual political careers, about the functioning of parties and about how representation works at a particular point in time or over multiple electoral cycles. The failure to acknowledge this point by political actors and bureaucracies in young democracies has the potential to limit the accountability of the political system as well as the
production of academic knowledge about electoral and partisan politics. The article is a case study analyzing the causes behind this unfortunate scenario in Romania, where no complete registry of candidatures exists and key information about the candidates running in the 1990-2000 elections seems to have been lost forever. We use process tracing to map the sequence (Collier 2011) of bureaucratic decisions and failures that have led to this outcome. We also document the efforts made and the strategies adopted by a team of researchers to uncover and reconstruct the lists of candidates in order to build a comprehensive longitudinal data set of parliamentary candidatures that would cover all elections held since the 1989 Revolution.

The absence of comprehensive longitudinal candidate data has multiple interlinked causes. One of the main causes is related to the public authorities’ incapacity to understand in that first decade of democratic experience the importance of these data for both accountability processes and historical and empirical political research. This lack of understanding resulted in the absence of a detailed legal procedure regarding the storage and archiving of candidates’ lists and candidate data. In turn, this opened the way for the courts’ haphazard interpretation of the few relevant provisions included in the electoral laws: some destroyed these lists 3 months after the elections, others stored them for 10 years, and only a tiny minority archived them indefinitely. The serial failures in publishing and archiving the candidate data could have been avoided if the Romanian legislators or the executive would have established earlier an institution to ensure the integrated management of the electoral process. Such an institution, named the Permanent Electoral Authority, was founded only in 2003. Before that moment, the elections were coordinated solely by the Central Electoral Bureaus, temporary committees formed mostly by judges.

Another element that contributed to this outcome has to do with the characteristics of the emerging literature on voting behavior and legislative studies in Romania. Although several scholars have written about elections and voting behavior in the first two decades after 1989 (Datculescu and Liepelt 1991, Campeanu 1993, Carey 1995, Mungiu-Pippidi 1995, Badescu 2001, Popescu 2003, Roper and Fesnic 2003, Comsa 2008), the effect of candidate features on vote choice was not investigated, particularly because of an implicit belief (Marian 2012) that the electoral system in use at the time, closed list Proportional Representation, favored party-based voting decisions. The research on party institutionalization, legislative recruitment and candidate selection practices in Romania suffered tremendously from the absence of comprehensive candidate data covering multiple electoral cycles. Beyond the descriptive articles analyzing the parties’ candidate selection formal rules (Ciobanu 2007), the few empirical studies which were published concentrated either on the elected candidates (Stefan 2004; Chiva 2005; Stefan and Greceanu, 2013) or on recent elections for which data was available (Gherghina and Chiru 2010; Chiru 2010).
Moreover, most of the voting behavior and legislative recruitment studies took a case study approach - looking at the outcomes of one election. All these elements resulted in little concern from the academic community towards collecting and storing longitudinal candidate data from the 1990s and early 2000s.2

Searching, collecting and matching information on the Romanian parliamentary candidates was an intensive experience that required many months of coordinated efforts by an entire research team3, which devised and implemented several research strategies to cope with the limited information and the various types of logistical or methodological obstacles. The story of this experience could be relevant for a larger audience given that such obstacles might be common in other democratizing countries with an underdeveloped state bureaucracy and a limited political understanding of the value that candidate records hold for both the transparency of the electoral process and historical and political research.

The introduction is followed by an in-depth analysis of electoral legislation that aims to identify the type of information the Romanian state has collected from candidates at parliamentary elections held from 1990 to 2012 and the rules governing the storage and archiving of these data. The next section describes our attempts to retrieve the complete lists of candidates from various public institutions and county courts and the outcomes of these efforts. We then present the data collection and collation process and the main characteristics of the data set we built. The last section discusses the obstacles that had to be surpassed in matching the data and the solutions we adopted. The conclusion reflects on the entire process and proposes several directions for further research and advocacy.

WHAT TYPE OF CANDIDATE DATA DOES THE STATE COLLECT AT PARLIAMENTARY ELECTIONS?

Romania not only lacks a complete public registry or data set of candidatures at parliamentary elections but we do not even know how many candidates ran at each parliamentary election held from 1990 to 2000. The information provided by both legal documents and academic sources is extremely scarce on this issue.4 Regarding the latter type of source, several authors (Preda and Soare 2008: 78) have reported the number of candidate lists put forward by parties for each parliamentary election from 1990 to 2000, observing their rather constant decline, but no one compiled and published the number of candidates running in each of those elections.

Despite an extensive review of academic and legal sources we could only identify information for the 1990 and 2000 elections, but these are also rather imprecise. It seems that in 1990 there were approximately 5,700 candidates proposed by parties and 212 independent candidates running for the Assembly of Deputies,
while at the Senate the corresponding figures were: 1,580 party candidates and 126 independents (Bucur 2014: 88). For the parliamentary elections held in 2000 the figures reported by the media were 9,828 candidates running for the Chamber of Deputies while ‘more than 4,000’ ran for the Senate (Agerpress 2012). However the final election report of the OSCE maintains that ‘approximately 20,000 candidates and some 80 parties, electoral alliances and independent candidates contested the parliamentary seats in the 2000 elections’ (OSCE 2001: 3). What we know for sure is that at each election from 1990 to 2004 the vast majority of candidates ran for parties which had no chance of winning a seat - most probably the peak was reached in 2000 with more than 10,000 candidates proposed by marginal, non-parliamentary parties. Running for a party that has no chance to win a parliamentary seat is in itself a meaningful form of political participation and should not be discarded as irrelevant.

These massive data gaps exist to this day despite the fact that the authorities collected extensive information about the candidates. In order to better understand the causes behind this absence of candidate data, I conducted an in-depth analysis of the relevant electoral legislation together with all its amendments and changes since 1990. This analysis had two objectives: to identify what kind of candidate data did the state collect at parliamentary elections and to reveal how the laws regulated the storage of candidate lists after the elections.

The Decree law 92/1990 for the election of the Parliament and the President of Romania established how the first elections after the December 1989 Revolution were to be organized. Article 42 of this law mentioned that the candidates had to provide their address, occupation and profession and that the electoral bureaus had to make this information public. A new electoral law was adopted in 1992 which maintained the abovementioned provision, added the obligation for candidates to declare their date and place of birth, and removed the publication requirement.

Since 2004 candidates have to fill in two additional statements: one regarding their wealth (income, assets etc) and another regarding their collaboration with the Communist political police, the ‘Securitate’. Moreover, since 2008 candidates are also obliged to disclose their business interests (e.g. whether they are shareholders, or members of the leadership of a company, whether they are members of trade unions or other professional associations etc.). Beyond the information listed in Table 1, another mandatory element was the candidate’s party in case the list was put forward by an electoral alliance.\(^5\)
Table 1  Candidate data collected by the state at each parliamentary election

<table>
<thead>
<tr>
<th></th>
<th>Address, Occupation, Profession</th>
<th>Date and place of birth</th>
<th>Collaboration with Communist political police statement</th>
<th>Wealth statement</th>
<th>Interests statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>✓</td>
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<td></td>
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<td></td>
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<tr>
<td>1992</td>
<td>✓</td>
<td>✓</td>
<td></td>
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<td></td>
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<tr>
<td>1996</td>
<td>✓</td>
<td>✓</td>
<td></td>
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<tr>
<td>2000</td>
<td>✓</td>
<td>✓</td>
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<td></td>
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<tr>
<td>2004</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>2008</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>2012</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

Sources: Decree law 92/1990 (art. 42), Law 68/1992 (art. 33.8), Law 373/2004 (art. 44.8), Law 35/2008 (art. 29.10-11).

In deciding what information to publish about candidates running for public office from the extensive set of collected data, politicians and bureaucrats have to deal with the trade-off between what is personal data that needs to be protected and the public interest regarding the features and qualities of those who want to represent their fellow citizens. The Romanian authorities have not made any effort to explain how this trade-off was solved and why the full transparency of the 1990 elections has since been abandoned.

In addition, the subsequent electoral laws offer far fewer details regarding what happens with the candidates’ data and the candidates’ lists after the elections. A procedure mentioned in all these bills is that the electoral bureaus of the polling stations have to hand over all the voting materials to the county courts or tribunals: see the article 36.f of the Decree law 92/199, the article 29.f of the Law 68/1992, the article 118 of the Law 373/2004 and the article 20 of the Law 35/2008. Moreover, the same article 118 of Law 373/2004 establishes that the courts are obliged to keep the voting materials only three months after the elections at which time they are instructed to hand them over to private companies to be destroyed. As it will become clear from the next section, which tells the story of our correspondence with the county courts, the legal interpretation of this provision offered a massive blow to any attempts to construct a data set that would include all candidates running in parliamentary elections from 1990 to 2000.
BUILDING THE ROMANIAN PARLIAMENTARY CANDIDATE DATA SET: THE LEGAL ROUTE

In an attempt to obtain the complete lists of candidates for the first five parliamentary elections (1990–2004), we sent several Freedom of Information requests to the Permanent Electoral Authority, the National State Archives, and the 42 county tribunals. The Permanent Electoral Authority responded that the party lists of candidates for parliamentary elections are archived by the court which has jurisdiction over the particular electoral constituency: that means the 41 county courts (‘Tribunal județean’) and the Bucharest Tribunal. We also received a negative response from The National State Archives who said that they do not have any lists of candidates running at the parliamentary elections held from 1990 to 2000.

In January 2014 we sent Freedom of Information (FOI) requests to all the 41 county courts and to the Bucharest Tribunal asking for the electronic copies of the 1990–2004 electoral lists used in those counties, or for the possibility to copy them ourselves. We also sent a number of reminders in February and March 2014. The response rate was 83%: 7 courts never replied to our FOI requests, although they are required by the FOI law (544/2001) to give an answer in no more than 30 days.

Figure 1 below maps the answers we received and the non-answers. As it can be seen from the figure, the most frequent practice of county courts was to destroy the candidate lists three months after the elections, considering them to be voting materials: 15 out of 42 tribunals (36%) mentioned this solution. Other 9 courts answered that they kept the lists in their archives for 10 years, while 3 courts said they could not find the lists.

Figure 1  How did the county courts deal with the lists of candidates?
Finally, only two courts did send us the lists, while two others invited us to visit their archives to make copies. One of the two courts that sent the lists redacted the document to such an extent that it was made unusable since much of the personal information was blacked out (e.g. profession, year of birth). The ‘other’ category includes 4 courts which gave rather peculiar answers. One of them refused any cooperation, telling us that the lists contain the candidates’ personal data and they ‘do not represent information of public interest’. Another said that they have sent the documents to the National Archives. The Ilfov court said that due to administrative reasons prior to 2011, all such documents from this county were archived by the Bucharest court. The latter had a different interpretation of the other courts’ terms for archiving and storing the lists: they told us that they can give us access to the 2000 and 2004 lists, while the rest had been destroyed because ‘the terms for keeping them had passed’.

In March 2014 we also wrote to the General Secretariat of the Government (SGG) using the same FOI legal framework. The SGG responded they do not hold such data but forwarded our request to the Permanent Electoral Authority, who ‘miraculously’ found the complete 2004 candidate data and sent it by email.

**COLLECTING AND COLLATING THE CANDIDATE DATA**

In the end, our data set, ‘The Romanian Parliamentary Candidates Study 1990-2012’ (Chiru and Popescu 2015) is based mostly on official electoral records. For the 1992–2000 elections, the names of the candidates, their party affiliation, list position and the county where they ran were retrieved from the official gazette *Monitorul Oficial*, which publishes all official public documents including new legislation passed by the Parliament. The election reports published by *Monitorul Oficial* included the list of elected candidates as well as the list of substitutes - all unelected candidates on a county party list who would replace an MP in case of resignation or death. Unfortunately, the list of substitutes was reported only for those counties where the party won at least one seat.

We had to leave out the founding elections held in 1990 because of severe data availability problems. First, the election report published by *Monitorul Oficial* included only the list of elected candidates and did not offer information regarding their list position (i.e. candidate names published in alphabetical order). Second, we also tried to find whether the complete lists of candidates were published by national newspapers. At the end of this archival investigation the only lists that could be identified were those put forward by parties for the Bucharest constituency, which were published by the *Libertatea* newspaper. Besides the party affiliation and the list position, these particular lists included the complete address, profession and occupation of the candidate as seen in Figure 2 below, which shows an excerpt from the PNL candidate list of for the Senate.
Candidates competing for the reserved ethnic minority seats were excluded from the data collection as these candidates compete under distinct electoral rules in non-territorially organized single-member seat contests. They are also not part of the same type of electoral competition with few minorities having competing organizations on the ballot. Their goal is generally to reach the required number of votes for the reserved seat for each specific recognized minority (Protsyk and Matichescu 2010).

The resulting data set has 2,146 candidates who ran in 1992, 3,510 who participated in the 1996 elections and 2,932 candidates who ran in 2000. In addition, we obtained the entire population of candidates, i.e. independents, as well as candidates of parliamentary and non-parliamentary parties for the 2004 (10,291 candidates), 2008 (2,933 candidates) and 2012 elections (2,451 candidates). As mentioned above, the 2004 data was obtained from the Permanent Electoral Authority. The 2008 and 2012 candidate data were retrieved from the Romanian Electoral Data platform.

We manually coded the candidates’ gender and incumbency status. For the latter, we considered a candidate to be incumbent if s/he acted as an MP during the last legislative term, irrespective of the duration of mandate, thus including those candidates who were substitute MPs or resigned. By matching records across years we could determine who ran in how many elections, and how many years they spent in Parliament.

To understand better how the ‘winning list and substitutes’ issue shaped the data availability, Figures 3 and 4 below illustrate the number of candidate records that we could retrieve for PNL and UDMR at the 2000 elections for each constituency. For both upper and lower house elections, Romania has been divided into 42 constituencies – corresponding to the 41 counties and the capital city Bucharest – which are highly heterogeneous in terms of population size and number of seats in parliament.
Figure 3  Number of PNL candidates at the 2000 parliamentary elections retrieved by the dataset

The number of PNL candidates in each constituency for both houses varied from 10 to 54, whereas for the UDMR it varied from 2 to 20. Parties could nominate twice as many candidates in each district as the available seats and this decision usually co-varied with the number of mandates the party expected to win.

This is one factor that explains why there are more PNL candidates in the dataset, the other being that the UDMR’s support is concentrated in Transylvania, where its ethnic stronghold is situated. Given the fact that the ethnic Hungarian party won very few mandates outside the Carpathian Arch, we did not have access to a considerable number of candidates’ records running on the UDMR unsuccessful lists.

Figure 4  Number of UDMR candidates at the 2000 parliamentary elections retrieved by the dataset
Table 2 below presents the party affiliation and numerical distribution of the candidate records we were able to retrieve for the 8 most successful parties or alliances that ran in Romanian parliamentary elections. Our sample also includes candidate data from many other non-parliamentary parties that ran in 2004, 2008 and 2012 but failed to win representation.

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</thead>
<tbody>
<tr>
<td>PSD (PDSR/FDSN)</td>
<td>499</td>
<td>649</td>
<td>654</td>
<td>637</td>
<td>452</td>
<td>230</td>
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<tr>
<td>CDR/ PNTCD</td>
<td>563</td>
<td>657</td>
<td>-</td>
<td>624</td>
<td>-</td>
<td>-</td>
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<tr>
<td>PD (FSN/ USD/ARD)</td>
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<td>641</td>
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<tr>
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<td>-</td>
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<td>356</td>
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<tr>
<td>PRM</td>
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<td>620</td>
<td>638</td>
<td>636</td>
<td>440</td>
<td>286</td>
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<tr>
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<td>160</td>
<td>298</td>
<td>328</td>
<td>431</td>
<td>447</td>
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<tr>
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<td>645</td>
<td>446</td>
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<td>-</td>
<td>-</td>
</tr>
<tr>
<td>PSM/PAS</td>
<td>135</td>
<td>625</td>
<td>-</td>
<td>-</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

MATCHING PROCEDURES AND DECISIONS

Because of the degree of missing information for the 1990 elections and because the research objective that motivated our data collection was to map the patterns of candidate recruitment during the PR era⁹, we only matched the 1992 to the 2004 data. However, in the near future, we plan to also match the candidate records for the 2008 and 2012 elections.

One of the problems we faced in matching the candidate records was that in some years the names were written with Romanian diacritics (1992), while in others (1996, 2000, 2004) diacritics were not used. Hungarian diacritical marks were not used at all, which made it even more difficult to identify additional information about these candidates from the Internet or from other written sources. Moreover, in the 2004 data set some of the Hungarian names which originally had diacritics were replaced with odd characters, for example Lőrinicz Rozália appeared as: Linox RINCZ L. ROZ-LIA. Because the candidate names were written with capital letters in the 1996, 2000, and 2004 data sets, we had to transform in the same manner the names of the candidates for the 1992 elections, which originally had only the first letter in capitals.

Beyond a number of automatic coding decisions explained below, the matching procedure implied, most of the time, a case by case judging, while for those
candidates for whom the criteria did not help us in reaching an unequivocal decision, we also collected additional relevant information available online.

The information used for matching included the candidate’s name, party affiliation, age, the county where she ran and the ranking on the list.\textsuperscript{10} Thus, if a candidate had the same name, was running for the same party in the same county and had a similar list position, the matching decision was relatively easy.\textsuperscript{11} But this situation did not frequently occur, mostly because of the high number of newcomers participating in each election and the practice of party switching.

An additional issue adding to the complexity of the matching decisions was geographical electoral mobility. Thus we had to decide whether candidates with the same name running in different counties at different elections were the same person or not. Carpet bagging or parachuting candidates in counties where they had no footing, but where the party itself had a strong support, was quite a massive phenomenon particularly for incumbents (Stefan 2004: 236) or other party notables in search for an easy (re)election. Last but not least, matching was difficult due to name changes, something which applied particularly to women candidates following marriage or divorce.\textsuperscript{12}

Only the 2004 data set included information about the candidates’ age. For this reason, one procedure used for automatic matching was to assign a unique identification number and to exclude all those candidates who were too young to run in previous elections: according to the Constitution, candidates for the Chamber of Deputies must be at least 23 years of age while those running for the Senate should be at least 35 years of age. This applied to all candidates who were 26 or younger in 2004: they were not allowed to run in the 2000 elections; similarly someone who was 29 in 2004 could not have ran in the 1996 election and so on, for all elections. Moreover, if a candidate was 37 in 2004 and a candidate with the same name ran for the Senate in 2000, we considered the two to be different individuals. Once again, similar exclusion decisions were made for Senate candidates for all elections, taking into account the age requirement for candidacy.

In cases of inter-party mobility, the matching decisions we took also relied heavily on knowledge on the ideological profile of the parties involved, because for both individual party hopping and faction switching, moving to a party that is in the same ideological family or has a similar set of policy positions is more likely. This is an empirical pattern that was observed in contexts as different as Brazil (Desposato 2009), Czech Republic and Poland (Shabad and Slomczynski 2004), or the European Parliament (McElroy and Benoit 2009). Although Gherghina (2014b) argues that party switching in the Romanian Parliament is generally not driven by ideological compatibility concerns, the ideological connection seems to explain a considerable amount of candidate switching both individually and at group level: for splinter parties and for factions that switched from one party to
another. An example of the former case is the group of ex-candidates belonging to the Democratic Party (PD) who ended up running for the Democratic Force (FD), a splinter, non-parliamentary party founded in 2004 by Petre Roman, the PD’s former president. Illustrative for the latter case are the factions of incumbent MPs, former members of the Social Democratic Party (PSD) running in 2004 for the Socialist Alliance Party (PAS) or for the United Socialist Party (PSU), that are smaller leftist, non-parliamentary parties. Finally, an example of individual switching in the same ideological family is represented by a few ex-Christian Democratic National Peasant Party (PNTCD) candidates who ran in 2004 for the Union for the Reconstruction of Romania (URR).

For five\textsuperscript{13} small non-parliamentary parties that ran in 2004 and that were ideologically very distinct from the rest (e.g. the two extreme right parties: Party for the Homeland and the Christian National Democratic Party), we employed a mixed strategy. We randomly manually coded more than half of their candidates: more precisely, a share varying from 56 percent to 69 percent of the lists. Since only one or two candidates in these coded samples had run in previous elections, we assigned the rest unique identification numbers.

After matching the 1992-2004 data we observed that 89% of the candidates in the sample ran only in one election, 8.2% participated in 2 elections, 2.2% ran in 3, whereas only 0.4% appeared in all 4 elections. Overall, there are 1,799 candidates in the sample who ran in two or more elections. The share of candidates who participated in more than one election was the highest in the UDMR sample (47%), followed by PSD (40%), PD and PRM (36%) and PNL (31%). These levels of re-nomination point to a relatively high volatility of party cadres, a finding in line with previous empirical research that focused on the re-nomination rates of MPs only (Gherghina 2014a).

CONCLUSION

This article offers a guide to researchers interested in collecting candidate data in environments where both the actors that design and those who administer the electoral process have poor bureaucratic capacity and a limited understanding of the relevance of such data.

Our analysis of relevant legal documents and the intensive interaction with county courts and various other national institutions not only helped us recover the complete candidate data from the 2004 parliamentary elections, but, more importantly, it allowed us to track the process through which a large part of the 1990–2000 candidate lists were destroyed.

This process strengthened our belief that establishing a publicly available registry of candidates would be a form of accountability because it would allow
ordinary citizens, activists and journalists not only to track individual political careers, but also to judge diverse but crucial democratic aspects such as whether or not parties engage in descriptive representation or they tend to privilege certain socio-economic strata. For academics such a registry would enable longitudinal analyses of topics such as legislative recruitment practices, the degree of party institutionalization at local, regional and national level, the degree of electoral party switching or even comparisons between the wealth trajectories of elected officials and unelected candidates. A proposal to create such a registry was put forward by a policy brief submitted to the parliamentary select committee that debated and initiated the electoral reform bills in 2015 (Chiru et al 2015). Unfortunately, the adopted new electoral bills did not include such a provision.

NOTES

1 The candidate data compiled through the efforts described in this article was later on used in a study (Chiru and Popescu 2016) that analyzes longitudinally the candidate list placement at the Romanian parliamentary elections.
2 For an exception see Popescu and Hannavy (2001): their platform also included candidate data for the 1992 and 1996 Romanian parliamentary elections.
3 I would like to thank Marina Popescu, Denisa Diaconu, Anca Ciochină, Alin Croitoru and Bianca Toma for their help in searching, collecting, and matching the data.
4 We also asked the Permanent Electoral Authority about these figures but the answer was that they do not have this information - personal email communication received on March, 8 2016.
5 Moreover, the 2004 law also asked candidates to provide their father’s initial, a provision that was abandoned in 2008 and replaced with the requirement of indicating the personal numerical code (CNP), an unique identification number each citizen receives and which is mentioned on all her official documents: from identity card and passport to driving license.
6 Personal email communication received on November 12, 2013.
7 Personal email communication received on July 21, 2014.
8 http://www.lege-online.ro/lr-PROCES%20VERBAL-din%201990-(92287).html
9 Romania changed its electoral system in 2008 replacing the closed list PR with an original mixed member proportional system in which all candidates run in SMD, but only those who win the absolute majority of votes receive the mandate directly. The other mandates are allocated proportionally based on the party vote at county and national level. In 2015 another electoral reform was implemented, the legislators deciding to return to the closed list PR system (Chiru 2015).
10 For candidates who were elected at some point between 1990 and 2012, we also used for matching decisions the supplementary information that was available regarding their biographies and political careers on the official websites of the Chamber of Deputies and Senate.
11 More than 80% of the manual coding was done by myself, the rest being carried by two research assistants. We did not compute a measure of inter-coder reliability, but the work of the research assistants was constantly verified.
12 In Romania most women renounce their family name after marriage and take the family name of their husbands. A different practice has appeared only recently, but it remains
rather marginal, and limited mostly to middle class families: the newlyweds adopt both family names.

13 These are: the Party for the Homeland (Partidul pentru Patrie, PP), the Christian National Democratic Party (Partidul National Democrat Crestin, PNDC), the Romanian Socialist Party (Partidul Socialist Roman, PSR), the New Democracy Party (Partidul Noua Democratie, PND) and the Romanian Workers’ Party (Partidul Muncitoresc Roman, PMR).

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Ask: Research and Methods is an open access, peer-reviewed academic journal devoted to the methodology of social science research. ASK was first published in 1995 by the Institute of Philosophy and Sociology of the Polish Academy of Sciences (IFiS PAN). In the premiere issue, the editor noted that ASK was created because there was no such social science methods journal produced in Poland.

INTRODUCTION

Ask: Research and Methods is an open access, peer-reviewed academic journal devoted to the methodology of social science research. ASK was first published in 1995 by the Institute of Philosophy and Sociology of the Polish Academy of Sciences (IFiS PAN). In the premiere issue, the editor noted that ASK was created because there was no such social science methods journal produced in Poland.
Since then, much has changed in ASK, but one thing did not: ASK remains the only journal produced by a Polish institution dedicated to publishing research on a wide array of methodological issues in the social sciences.

The first English-language articles appeared in 2007, and since 2008, ASK publishes exclusively in English. In 2012, ASK obtained a grant from the Polish Ministry of Science and Higher Education for the internationalization and digitization of ASK. We expanded the editorial board that advises ASK, hired managing editors, and digitized all issues of ASK from 1995 to the present, all of which can be found at ASK’s website, askresearchandmethods.org.

In 2014, ASK entered a co-publishing arrangement with The Ohio State University (OSU) and the Institute of Philosophy and Sociology of the Polish Academy of Sciences. This co-publishing agreement was made possible by the organizational support of Cross-national Studies: Interdisciplinary Research and Training Program (CONSIRT.osu.edu). The purpose of the arrangement was move ASK from primarily paper-distribution to open access. ASK’s primary distribution now occurs free, on-line, and funded by IFiS PAN and OSU, public institutions interested in the advancement of science.

Before 2008, ASK followed the tradition of other Polish language scientific journals by publishing short English language summaries of the articles. These summaries, available in the back issues of ASK, cover only a small portion of what the article is about. To provide more information about advances in Polish methodology as published in ASK from the early stages of the post-Communist era to the mid-2000s, we decided to translate the abstracts themselves.

Funded by a grant from the Ministry of Science and Higher Education, we translated into English all abstracts published in ASK from 1995 to 2007. The translator was Ania Purisch. Key words first appeared in ASK in 2006. Inna Bell provided, ex post, the key words for each article from 1995 to 2005.

**ASK: RESEARCH AND METHODS ARTICLE ABSTRACTS 1995–2007**

**Social studies in the 1990s. Continuum and change**

1995, vol. 1, pp. 7–24

Henryk Domaniński, Zbigniew Sawiński, Franciszek Sztabiński, and Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

This article gives an overview of the newest tendencies in social studies in Poland as well as of basic issues still present in daily research, which nonetheless remain pertinent. The following subjects will be discussed: the expansive development of public opinion and marketing research, the growing participation of Polish
sociologists in international research projects, the need for codifying research ethics rules, archiving problems and new data collection techniques and computer processing.

Key words: public opinion, marketing research, data collection, computer assisted analysis, ethics

The ban on the publication of public opinion polls in the campaign of 1993. Law and reality


Antoni Sułek, Institute of Sociology, University of Warsaw

During the parliamentary elections (to the Sejm, the lower chamber of Parliament) of 1993 the ban on publishing polling results became a contentious matter already in the course of parliamentary works on the electoral system. During the campaign, its validity was the subject of public debate. The ban was circumvented, broken, and even abused. In this paper, I show how the ban on publishing opinion polls came into being and how it functioned during the campaign of 1993. I also formulate a number of conclusions based on these experiences. I rely on newspaper articles, television and radio broadcasts, as well as documents from the Parliament, State Electoral Committee, and Supreme Court.

Key words: public opinion; election; parliamentary election; political campaign; legal ban on publishing polling results

The problem of the sponsor of survey research in Poland

1995 vol. 1, pp. 37–47

Zygmunt Gostowski, Institute of Sociology, University of Lodz

Starting from the assumption that voicing one’s views on a given subject is a form of social behavior conditioned by feelings of group belonging and a presumption about the addressee of such views, the author examines the various possible types of influence such an assumption might have on the behavior and answers given by respondents. This issue is strongly connected to the fact that the survey designers expressly forbid revealing the sponsor’s name to the respondents – in accordance with the international code of survey practice. The author questions the legitimacy of this ban both because of moral and social implications as well for the sake of research and substance. Indeed, he believes that knowledge of the survey client anchors the answers of the respondent socially, giving them the value of authentic, socially-addressed verbal behavior. The article presents a number of hypotheses
regarding the influence that knowledge of the sponsor’s identity may have on the substance of opinions obtained in the interview and announces that results of further research aimed at verifying these hypotheses will be presented in future papers.

Key words: survey research; respondent behavior; disclosure of sponsor’s identity

Survey research quality control: Questions and answers

1995, vol. 1, pp. 49–60

Franciszek Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

This paper is devoted to the question of quality controlling the work of survey interviewers. Quality control is treated as one element in a number of steps aimed at improving the quality standards of work performed by interviewers and the material gathered. I argue that there should be three basic questions on the axis organizing quality control: (1) What to control? (a question about control subject matter), (2) How much to control? (a question about scope), (3) How to control? (a methodological question). Depending on the answers given, and the solutions implemented, one can point to a dozen available control study schemes. And finally, when making a choice, it is worth remembering one last question about the credibility of the collected data: What is the potential value of quality control data?

Key words: surveys; interview; data quality

Why occupation? Problems with the measurement of social position in sociological research


Henryk Domański, Institute of Philosophy and Sociology, Polish Academy of Sciences

In sociological analyses, occupation is the most frequently used indicator of the social position of individuals. This article presents a number of arguments in support of this approach:

(1) theoretical arguments in whose light professional differentiation constitutes an important axis along which the contemporary world divides, (2) data from empirical analyses proving the validity of the occupational indicator, (3) some remarks on the subject of its usefulness at the stage of data gathering and analysis. This paper is the first in a series devoted to perfecting indicators of professional position currently in use in Polish sociology.

Key words: occupation; surveys; social stratification; social status
The interviewer effect: Does it only affect the respondent?

Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

When analyzing how an interview (that is, the situation itself) affects the quality of the data obtained, one must not only bear in mind the influence that the interviewer exerts on the respondent, but also the influence of the respondent on the interviewer. This article presents analyses of data from research on deviant behavior in young people in 1993 which allows us to conclude that the influence goes both ways: after having been in contact with the respondents, the interviewers changed their opinions concerning the topics discussed in the survey and their expectations of the answers of the respondents. The author believes that the shifting opinions and expectations of the interviewers can in turn be transferred onto more respondents thus creating a secondary interviewer effect that cannot be traced at the level of the entire sample. In other words, the response bias resulting from the interviewer effect has much broader consequences than it would appear from an analysis of the interviewer effect alone.

Key words: survey research; interview; data quality control; response bias; interviewer effect

The influence of question phrasing on questionnaire responses
1995, vol. 2, pp. 7–19

Jean-Paul Grémy, Institut des Hautes Études de la Sécurité Intérieure, Paris, France

Beginning with 1987, a number of split ballot experiments were conducted in France concerning the effects of question phrasing on survey research data. The main findings of these experiments concern such problems as how to include a mid-scale (such as “undecided” or “don’t know”) response, the effect of intonation when asking questions and the order in which questions appear in a questionnaire. Analyses show to what degree these elements affect answers given by respondents during an interview.

Key words: survey research; split ballot experiments; scales; response bias; don’t know and refusals
Why agree to an interview? Problems of interview arrangement in survey research


Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

The goal of interview arrangement is to provide the respondent with specific information about the research and to convince him to participate. Basing on empirical studies, the article shows (1) the reasons why respondents agree to take part in the survey, (2) the susceptibility of different categories of respondents to different arguments. The article also suggests to what extent arguments used during interview arrangement can influence the validity of answers provided during the interviews.

Key words: survey research; interviews; refusals; validity

Interviewer qualities and the credibility of data collected in questionnaire surveys


Aleksandra Dukaczewska, Institute of Philosophy and Sociology, Polish Academy of Sciences

This paper is devoted to the interviewer effect in survey research. It attempts to gauge the scope of the phenomenon based on data from the third edition of the Polish General Social Survey and information about specific qualities of interviewers. The following qualities were taken into account: sex, age, marital status, level and profile of education, as well as experience in conducting interviews. Analyses show that each interviewer quality, taken on its own, has little correlation with the answers from respondents, but that the “general” interviewer effect, understood to be a percentage of the variance explained by interviewer qualities is very high and amounts to 11–27% for questions about facts, 39–63% for questions about opinions. The author believes that part of these findings can likely be explained by apparent correlations connected to those aspects of the interview which were not taken into account in the analyses.

Key words: Polish General Social Survey (PGSS); interview; response bias; interviewer effect
Occupational classification in social research

1995, vol. 2, pp. 53–75

Zbigniew Sawiński, Lutay H.C., Komputerowa Obsługa Gromadzenia i Przetwarzania Danych Badawczych

In the same way occupation is the basic variable in social research, occupational classification is the basic tool for gathering and analyzing data on occupational differentiation. In simple cases, classification is included in the form of a simple closed question in the information gathering tool. More often, however, the goal is to collect more specific information about occupation which will then be codified, and the names of occupations attributed to selected classification categories. The article discusses the different classifications of occupation used in social research in Poland, which were mostly developed for the use of national statistics. It further presents the assumptions behind social classification, namely the tools created for the identification of the basic segments of the class-stratum structure. In conclusion, I present remarks on the compatibility of different classifications used in social research.

Key words: occupational differentiation; data analysis; social stratification.

Polish sociological occupational classification (PSKZ-95): A research proposal


Zbigniew Sawiński and Henryk Domański, Institute of Philosophy and Sociology, Polish Academy of Sciences

Occupation is the most basic and frequently-used indicator of the place occupied by people within the social structure. We recommend a new Polish Sociological Occupational Classification Standard (Polska Socjologiczna Klasyfikacja Zawodów – PSKZ-95) adjusted to reflect changes in the socio-professional structure in Poland in recent years. The need to disseminate a new pattern for occupational coding and new data analysis tools arises from the fact that the patterns currently used in sociological research require considerable modifications – they were devised in the 1970s, and reflected a different structure of Polish society. The article further gives a description of PSKZ-95, alongside its substantive and methodological basis, and then discusses its formal structure and points to the possibility of using computer-assisted data coding for PSKZ-95.

Key words: SKZ Scores; classification of occupations; data analysis; social stratification; computer assisted coding
Telephone surveys
1996, pp. 7–36

Zbigniew Sawiński, Institute for Social Studies, University of Warsaw

Telephone surveys as a research tool have come into widespread use since the 1970s with the spread of computer technology. In the second half of the 1980s this method began replacing traditional face to face interviews in many countries. The article discusses the basics of telephone survey organization. An important aspect of this technique is the use of computers with specialized programs containing, among others, the following modules: questionnaire editing, automatic number dialing, assistance with the course of the conversation, management of the course of the session and end data processing. Telephone surveys rely on specific methods for sampling design specifically adapted for this research technique. In comparison with face-to-face interviews, telephone surveys provide a lot more opportunity for controlling the interviewer, who also needs slightly different qualifications and skills. These differences are reflected in the quality of the data gathered in both types of interviews. Finally, the article sketches new perspectives for the development of telephone survey techniques in Poland.
Key words: telephone surveys; computer assisted surveys; data processing

The place of biography in interpretive sociology – Fritz Schütze’s biographical sociology program
1996, pp. 37–54

Alicja Rokuszewska-Pawełek, Institute of Sociology, University of Lodz

The article presents a short survey of the trends and changes in interpretive approaches in the study of biography. In this context, I present Fritz Schütze’s theoretical and methodological conception, one of the most influential and developed proposals within this field of sociology. I will discuss in turn the basic tenets and theoretical categories of this perspective, the specific data collection technique (narrative interview), the analytical method linked to its processing and the main direction for empirical studies.
Key words: biography; narrative interview
Estimating and controlling the influence of the research center in analyses of the dynamics of social moods

1996, pp. 55–70

**Andrzej Klarkowski**, Wydział Psychologii UW, Zespół Analiz i Prognoz URM

Using the results of public opinion polls conducted in Poland after 1990, seven opinion indicators that were estimated for at least 12 months in parallel on representative samples by at least two different research centers have been selected. The level of similarity of the size of indicators measured at the same time and the similarity of the dynamics of value change have been described. The level of similarity confirms the validity and credibility of the research centers. Although different centers estimate the values of the indicators similarly, estimating changes carries a higher margin of error. Variance analyses with the dependent variable set as the indicator values and invariable variables as the time of measurement and the research firm results in statistically significant systematic disparities between the results obtained by the different firms. Using variance analysis in the case of a research program conducted in parallel by two research institutions (identical tools, equivalent samples, similar realization time) has confirmed the appearance of systematic difference in the results (the survey center effect).

The presence of the survey center effect in public opinion measurements justifies the use of parallel surveys in the case of diagnosis which have significant social importance as well as the use of statistical techniques that allow control of the differences arising from the survey center effect.

Key words: public opinion polls; survey center effect; pollster effect

The stability of responses in sociological research

1996, pp. 71–90

**Henryk Domański** and **Aleksandra Dukaczewska**, Institute of Philosophy and Sociology, Polish Academy of Sciences

The article presents the results of our analysis of the stability of information provided by respondents in questionnaire interviews. Stability is treated as an aspect of the reliability of the questions. The authors point to some of the conditionings for change in the respondents’ answers and the consequences for the credibility of the information provided. The basis for our findings are to be found in selected questions from two sets of data: The Polish General Social Survey of 1993 and 1994 together with the international module of the Survey Program and research of the Institute of Philosophy and Sociology of the Polish Academy of Science (PAN) conducted in 1995.
Key words: Polish General Social Survey (PGSS); survey research; questionnaire interview; stability of responses

**Polish memoir writing for competitions: Ideology in autobiography, autobiography in ideology**
1997, vol. 1–2 (5–6), pp. 9–17

Hanna Palska, Institute of Philosophy and Sociology, Polish Academy of Sciences

This article is devoted to the ideological context of Polish memoir writing for competitions. The problem is shown through the example of two separate episodes from the history of these competitions, namely a competition for which Józef Chałasiński’s *Młode Pokolenie Chłopów* (1938) was produced and the competitions for autobiographies from the early years of the People’s Republic of Poland (1948–1956). The ideological tint of the subject matter and of the instructions contained in competition announcements has important methodological consequences. Without questioning the source value of Polish collections of memoirs, I would like to highlight the limitations and the analytical possibilities offered to the researcher studying them.

Key words: memoir competition; ideology; autobiography

**The problem of reality in qualitative sociological research. The example of field work**

Krzysztof Konecki, Institute of Sociology, University of Lodz

This article is a form of storytelling (introspection) from a sociologist who conducted fieldwork. I will describe the surprises, the epistemological and methodological problems which come with fieldwork. I will depict the intellectual process which includes: a (1) description of the reality under scrutiny (so-called fieldwork stories), (2) the analytical process and the (3) the procedures used (the so-called triangulation procedures) which the researcher uses in fieldwork and during writing up his research report in order to adequately represent the reality under study. The three stages of representing reality overlap creating a single intellectual process, known as fieldwork research.

Key words: qualitative research; fieldwork; triangulation
Methodological reflections of the studies on Holocaust survivors


Barbara Engelking-Boni, Institute of Philosophy and Sociology, Polish Academy of Sciences

Drawing from my experience from studies on Holocaust survivors I point to specific methodological characteristics which appear in this particular type of qualitative studies. They arise from the use of unstructured narrative interviews which in many instances turn into storytelling (in the study examined here, accounts of war experiences). I also discuss the limitations of this technique linked to (1) the fact that the persons involved are not representative of the broader population (2) linguistic and cultural difficulties (3) and the danger of omitting differences in the war stories of the respondents which differentiate their experiences.

Key words: qualitative research; Holocaust; non-representative sample

The interviewer effect in the first stage of questionnaire surveys

1997, vol. 1–2 (5–6), pp. 53–71

Krystyna Lutyńska, Institute of Philosophy and Sociology, Polish Academy of Sciences

In the first part of this article I present different approaches to estimating the so-called interviewer effect and I point to those qualities of the interviewer which might influence the respondents. The second part of this article is devoted to an analysis of the relationship between carrying out the interviews and the influence of the qualities of the interviewer during the so-called arrangement stage of the interview. Analyses show that the qualities of the interviewers influence the “feasibility” of the interview. It is also strongly related to the type and the size of the place in which the interviews were conducted.

Key words: survey research; questionnaire survey; interviewer effect

The validity of responses in telephone surveys (CATI)

1997, vol. 1–2 (5–6), pp. 73–92

Franciszek Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

The need to conduct surveys in a short amount of time, together with the need for cost efficiency, has prompted, in Poland as elsewhere, a widespread development of a new research technique: the Computer Assisted Telephone Interview (CATI).
The first volume of ASK 1996 published a study discussing the rules for conducting interviews using this technique. The present article discusses the influence of the way data is obtained when using CATI on the answers provided by respondents – private persons. We examine this relationship from four perspectives: respondent anonymity, interviewer effect, the circumstances surrounding the conducting of the survey and the specificity of telephone contact.

Key words: Computer assisted telephone interview (CATI); respondent anonymity; interviewer effect

Is occupation a valid index of social position among non-working respondents?

1997, vol.1–2 (5–6), pp. 93–107

Henryk Domański, Institute of Philosophy and Sociology, Polish Academy of Sciences

The article tries to answer the question to what extent information concerning the occupation of respondents who aren’t employed at the time of the interview can be used as indicators of their social position. In sociological analyses this is a common practice. However, the condition for its suitability is the similarity between members of the same professional categories: the employed and unemployed in terms of the characteristics of their social position. The results of my analyses, which rely on data from the Polish General Social Survey, point to the fact that work is a differentiating factor. This means that including respondents who work and those who don’t within the same category (because of their identification of their last job) weakens the validity of occupation as an index of social position. In my conclusions, I nonetheless point to situations in which the criteria for validity ought to be examined within a broader context – that of theoretical and analytical gains, which explain the inclusion of unemployed respondents in our analyses.

Key words: social status; Polish General Social Survey (PGSS)

Rules for presenting survey research results in the press, with a special focus on election surveys


Antoni Sułek, Institute for Social Studies, University of Warsaw

The results of public opinion survey research are an important form of social information. They help satisfy the public’s curiosity about social affairs, they provide societies with a knowledge of themselves and are used as arguments in public debates. Surveys of political attitudes and pre-election polls are especially
relevant. The citizens of democratic countries have the right to access information – and a right to access truthful information. The press is an important client of public opinion polls and the main disseminator of its results. Consequently, they have the responsibility to protect that right. Public opinion polls are conducted with the use of precise research techniques – the results should be presented with equal precision. The following rules are based on the general rules of survey result presentation, on the detailed rules for the presentation of scientific research survey results, on internationally recognized regulations concerning the publication of surveys in the press and on analyses of Polish journalistic practice in the matter of relating public opinion poll results.

Key words: survey research; election; election survey; public opinion; attitudes; political attitudes

**Religion as an independent variable: Revisiting Weber’s hypothesis**

1998, vol. 7, pp. 7–16

Daniel H. Krymkowski and Luther H. Martin, University of Vermont, USA

Studies in the sociology of religion generally assume “religion” to be causal with little or no attention paid to the theoretical justification or basis for such a claim. We argue in this paper that most such studies fail to satisfy the conditions for causal inference. Weber, whom sociologists of religion often cite when theoretical claims are made, at worse never proposes religion as an independent variable and, at best, is very ambiguous on the issue. We suggest that recent directions in cognitive psychology might form the basis for further research concerning the social significance of religion.

Key words: religion; Weber; causal inferences; cognitive psychology

**Contemporary interviewers’ strategies and attitudes vs respondents’ reactions and new fears**


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This article is devoted to the relationship between interviewers and respondents in questionnaire surveys and the consequences of such relations for the entire study. It relies on data collected during the observation of interviewers and respondents over the course of 58 interviews. The data reveals that contemporary interviewers commit numerous basic errors (which influence the validity of the data) and often don’t follow the rules of professional ethics. It was also observed that the interviewers
often refer to the use of “strategies” with their respondents, often taking on the part of an ‘important official, referring to the respondents haughtily. They also tend to differentiate this behavior based on the respondents’ financial income, education, culture and place of residence. The attitudes and behavior of respondents are also conditioned psychosocially and culturally. I observed that respondents no longer exhibit fears of a political nature in the course of the interviews, but are reluctant to reveal their true financial situation for fear of embarrassing themselves in front of the interviewer (these arise from, among other, a conviction about their lack of education, competence, etc). Certain interviewer attitudes violate respondents’ privacy and increase their misgivings about the interview – especially in the countryside and in poorer and less educated areas.

Key words: surveys; validity; qualitative; ethics; interviewer effects

The presence of third parties in surveys using computer assisted telephone interviews (CATI)


Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

In Computer Assisted Telephone Interview (CATI) the circumstances in which the respondent provides his/her answers remain entirely outside of the researcher’s control, especially when a third party is present during the interview. Yet, research from questionnaire interviews shows that the presence of third parties can significantly influence the responses. This article discusses the results of a methodological study which tries to answer the question of whether third parties can influence the answers given by respondents in CATI interviews.

Key words: survey; computer assisted telephone interview (CATI)

Constructivism as a methodological orientation in social research

1999, vol. 8, pp. 7–28

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Constructivism is a relatively new phenomenon within the analysis of knowledge, although one that is already multi-dimensional. Since it breaks with a number of our long entrenched cognitive intuitions, its systematic explanation would require very elaborate reasoning. My goal here is more modest: I wish to present the specificity of the constructivist conception of knowledge in its methodological dimension. Those interested in further explanations are referred to the bibliography. My understanding of constructivism is expounded more broadly in the book
Przemoc i poznanie: studium z nie-klasycznej socjologii wiedzy. Zybertowicz 1995: also 1997. I believe constructivism is a methodologically relevant concept, because it identifies empirical mechanisms which condition cognitive successes in science. More specifically, it achieves results which particular scientific circles will consider successful.

Key words: constructivism, cognitive science

Survey studies in the 1990s against the background of postwar methodology

1999, vol. 8, pp. 29–42

Krystyna Lutyńska, Institute of Philosophy and Sociology, Polish Academy of Sciences

My discussion will be of a meditative nature with some recollection. Indeed, it appears that many of us presently feel the need to learn more about the postwar history of Polish sociology, and among other features, of its methodology – this is proved by, among others, the work on the history of sociology carried out by Włodzimierz Winclawski or the 1998 conference organized by Antoni Sułek on “The birth of public opinion studies in Poland.” Remembering at least part of this history will allow us to approach our current research from a fresh angle and a broader perspective.

Key words; history of methodology; history of sociology; public opinion

On the need to revitalize monographic studies. A new methodological challenge for academic sociology

1999, vol. 8, pp.43–50

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The basic premise of this article is the belief that sociology in Poland, dominated by survey techniques as it is, is unable to answer the main questions concerning our changing social reality, and when it does, it is in an oversimplified manner. This article is an attempt to point to possibilities which lie in the field of monographic studies, underlining their anchoring in sociological theory and their applicability. The article concludes with an emphasis on the fact that we are witnesses to the appearance of a certain turn in the methodological consciousness of sociologists towards the appreciation of procedures relying on monographic studies, but this revival cannot happen too soon. The article calls as well for a revision of teaching programs at universities and for the support of research financing institutions.

Key words: monographic studies; sociological theory; teaching methodology
Computer Assisted Telephone Interview (CATI): What are the gains and what are the losses?


Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

Computer Assisted Telephone Interview (CATI) have many organizational and financial advantages. In comparison with questionnaire surveys, they are cost- and time-effective, they favor the standardization of the behavior of interviewers, help limit error and better control work. Regardless of all the above, we must study the value of surveys conducted with this technique. This article, relying on empirical analyses, examines two problems relevant for this evaluation: (1) to what extent does the CATI sample differ from the samples from questionnaire surveys and (2) do CATI surveys yield similar responses to those obtained in questionnaire studies, and if so, in what way?
Key words: CATI; surveys; fieldwork control

Inaccessible respondents. Do they affect survey research?

1999, vol. 8, pp. 67–92

Henryk Domański, Institute of Philosophy and Sociology, Polish Academy of Sciences

This article attempts to determine the extent of the influence of inaccessible persons on survey research. Relying on data from the Polish General Social Survey (PGSS) from 1994 and data from a complementary study on inaccessible persons, I provide answers to two questions: (1) are inaccessible persons significantly different from the actual sample and (2) how strongly and in what way does their absence affect our conclusions? The relationships which are the subject of my analysis concern social stratification and selected attitudes. The conclusion is surprising, since in none of the cases did inaccessible persons have any considerable influence on the results of the study. Even though the respondents who didn’t find themselves in the PGSS-94 sample differed significantly from the respondents who were interviewed, there was no reflection of this in the force or the patterns of the relationships which describe the level of education, occupational position, income and opinions or the desired model role of women.
Key words: Polish General Social Survey (PGSS); non-response; sample bias
I-sort procedure and its characteristics based on studies of social identity in Poland and Russia

2000, vol. 9, pp. 7–38

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Social identity explains human attitudes, opinions and behaviors. My goal was to prepare measurement standards for identity recognition that would be appropriate for the study of large groups of individuals. In the following discussion, this procedure is referred to as I-sort. The social identity of every person is a system which would certainly prompt many interesting comments from a psychologist. However, I-sort prompts the following: “who are you, what is important to you, and the researcher will tell you what society you live in”. Moving from registered social identities to the aggregate of identification, i.e. the specific concoction whose analysis allows us to compare societies, calls for a methodological discussion.

Key words: social identity; I-sort; Poland; Russia

Individual in-depth analysis and focus group interviews – a comparative analysis

2000, vol. 8, pp. 39–50

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Focus Group Interviews (FGIs) and Individual in-Depth Interviews (IDIs) are techniques used most commonly in qualitative marketing research. The differences between them, which I discuss below, boil down to collecting data of a different nature, which is why they serve different goals for the researchers. It is also a matter of different contexts – if the study subject or persons involved in the study require that the respondents be within a group, then the appropriate technique will be the focus group. These serve as exploratory studies, when we need to find out a possibly full (aggregated rather than complete) scope of behaviors and consumer attitudes. We also use focus groups for certain pragmatic reasons, among which are data collecting speed and the possibility of studying a relatively large number of creative ideas. Individual in-depth interviews, on the other hand, are used for studies on the experiences of the individual. They are also used in situations where, due to the topic (intimate subjects or subjects strongly under the influence of group judgment) or the traits of the persons studied (great susceptibility to group pressure), we wish to eliminate the influence of the group.

Key words: focus groups; in-depth interviews; consumer attitudes
Sensitive topics in sociological studies in Poland

2000, vol. 9, pp. 51–63

Krystyna Lutyńska, Polish Academy of Sciences

The article comprises two parts: (1) a theoretical part which describes the concept of sensitivity and (2) an empirical section based on literature and the author’s own research. The article discusses some of the issues concerning sensitive questions in quantitative and qualitative studies. Specifically, I was interested in the psycho-social emotions raised by sensitive questions under the communist regime and in the 1990s. The studies show that currently the most sensitive questions relate to income, earnings, financial status, additional work, savings, financial situation etc. These are subjects which are most often lied about by the respondents (“defensive lying”). In my conclusion, I discuss the influence of sensitive questions on the validity of our results.

Key words: sensitive topics; qualitative; quantitative; Communism; emotions

Respondent availability

2000, vol. 9, strony 65–76

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The subject of this article is the availability of respondents in survey research. The problem isn’t new and has been repeatedly discussed in the literature. It remains relevant and important, however, at least because it is the main condition for survey realization itself. Researchers are still worried about decreasing rates of survey response which could question – both – the conclusions drawn from the survey and the very reasons for their realization. My analyses are based on data from the national survey research of 1998 on a representative sample of persons over 15 years of age. The research was carried out for 12 months, and 36 thousand respondents were questioned during its course. The study was executed by SGM/KRC Poland Media and commissioned by three publishers: Gazeta Wyborcza, Rzeczpospolita and Super Express. The results show a systematic relationship between the demographic qualities of respondents and their availability. My analysis assumed searching for those qualities of respondents which could explain their availability. In accordance with intuition, the elderly were more available, as well as persons with a lesser income and inhabitants of small towns. I also tried to describe a seasonal phenomenon concerning respondent availability – it appears
that there are slightly better chances for conducting interviews with respondents in
the first months of the year and during weekends.
Key words: non-response; surveys; demographic groups

The influence of “It’s hard to say” on analyses of results
2000, vol. 9, pp. 77–93

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Sciences

By relying on a number of concrete examples I will try to answer the question
of whether accounting for the category “it’s hard to say” has any bearing on the
result of analyses. Several decades of the history of methodological studies have
not yielded any unambiguous answers on how to deal with this basic problem.
The analyses presented below relate to the Polish context, and specifically to
the national survey of 1998. The basic question is the following: does omitting
the category at the stage of analyses change anything? I attempt to answer this
question on the basis of examples of attitudes analyzed by many previous authors.
It would appear that in the case of variables identifying self-reliance, tolerance of
irritating behaviors, acceptance for women joining the workforce and support for
social welfare policies, omitting the category “It’s hard to say” (as it appears from
the conclusions below) does not influence survey conclusions. It does not affect
the reliability or the validity of the scale, nor does it impact the strength of the
relationships between variables.
Key words: surveys; don’t know; tolerance; welfare attitudes; scale validity

Indicator selection

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Sciences

The article offers an overview of the classic issues that confront the researcher
when selecting indicators. It discusses, in turn: (1) the assumptions which lie at
the basis of the theory of indicators, (2) the place of indicators against the issue of
measurement, (3) problems concerning their selection, (4) issues of validity and
reliability which concern the assessment of the value of indicators and finally, (5)
ew trends in the methodology of indicators. The article relies on the classical
premises of the neo-positivist paradigm: first, that one can define the meaning
of social phenomena under investigation only in terms of empirical indicators,
and second, that sociological research should be seen as a process simultaneously unfolding on the levels of theory and data analysis, i.e. in the construction of theoretical concepts and subsequent selection of indicators.
Key words: survey indicators research; validity and reliability; positivism

An analysis of data from focus group interviews in marketing research

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Focus Group Interviews have been gaining popularity and are now offered by the majority of companies performing market research in Poland. This method is still treated by many researchers and clients as an easy and intuitive one that provides answers to basic research questions relatively quickly and cheaply. However, even if a certain amount of progress has been made in terms of the preliminary stages of focus group interviews, the data analysis stage remains neglected. It is often treated as a process requiring solely researcher experience and intuition and not binding standards. The goal of this article is to act as a reminder of those basic standards, and, most importantly, to emphasize the need for subjecting qualitative data analysis to the rule of systematic and intersubjective verifiability. Indeed, ignoring those rules leads to the formulation of unjustified conclusions and, as a result, to bad marketing decisions.
Key words: focus groups; qualitative analyses; marketing research

Computer aided qualitative content analysis: Software characteristics

Katarzyna Maria Wilk, The Ohio State University

The traditional approach to qualitative data analysis precludes any significant input from computers in interpreting research data. However, qualitative data analysis supported by computer software is becoming more and more popular in ethnography, hermeneutics and narrative studies. In this paper, I present different types of software that might be used in content analysis. I will try to show that these types of software incorporate traditional procedures used by generations of researchers. They are also efficient, faster and they significantly reduce the number of errors. In conclusion, I note that using these software packages enables the researcher to maintain control of decision making in qualitative data analysis and that the intersubjectivity produced by the software leads to consistency in data interpretation.
Key words: qualitative analysis software; narrative studies; intersubjectivity
Computer assisted personal interviews (CAPI): Is this really the ideal technique?


Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

Personal interviews with the support of computer software appear to connect the advantages of CATI with the merits of traditional face-to-face interviews. Is it then really the ideal research technique? The aim of this article is to familiarize Polish researchers with a technique that remains very little known in Poland and to point the obvious advantages for personal interviews, as well as the potential dangers it carries. I begin with a general classification of the various techniques of computer assisted interview techniques; next, I discuss the technical and social aspects of CAPI, i.e. the consequences of the introduction of a computer from the point of view of the interviewer and the respondent, the value of the data obtained and the opportunities for interviewer control this technique gives.

Key words: computer assisted telephone interviews (CATI); computer assisted personal interviews (CAPI); data quality

What do we know about our respondents? Size and source of errors in background variables

2001, vol. 10, pp. 91–114

Paweł Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

Questions concerning socio-demographic features of respondents (i.e., background variables) are built into each questionnaire schedule. They serve not only to characterize the group studied, but also to describe its differentiation. One should assume, however, that important information is usually burdened with error. The goal of this article is to establish the size of this error and its sources. I define error in terms of differences between answers given by the same respondent to the same question in two interviews. The data comes from control research from national surveys based on random samples carried out between 1997–2000. All in all, it includes 7029 randomly selected control interviews from 83 surveys. Analyses lead me to conclude the widespread scope of error. However, it differs in different types of variables. Errors mainly result from: poor memory of the respondents, tendency to give socially desirable answers and a lack of knowledge (e.g. about the income of family members). The results obtained are discussed against the background of comparable data (including verification data), where data assessment is made based on a comparison with documentation data.

Key words: background variables; survey error; data quality
Interviews with photographs in sociological research methodology and social practice

2002, vol. 11, pp. 7–26

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The goal of this article is to advocate the use of photographs in interviews for research purposes in social studies and social practice, including advertising and social work. The article strongly emphasizes the point that photography is a very helpful tool in all the stages of the research process not only in visual sociology (where this method has so far found the greatest use), but for nearly every researcher interested in culture and the social world. It is also suitable for professionals in social practice who primarily use quantitative techniques nowadays that are widespread and considered more scientific. The article therefore joins the continuing discussion over the status of quantitative methods in sociological methodology, and encourages readers to take a closer look at photography, a soft technique that has been “refreshed” and developed contemporarily, with a particular mention of its usefulness in social practice.

Key words: interviews with photographs; visual sociology; methodology; quantitative methods

Identifying measurement errors in structural equation model interdependencies

2002, vol. 11, pp. 27–44

Henryk Domanski, Institute of Philosophy and Sociology, Polish Academy of Sciences

The development of quantitative analysis was accompanied from the beginning by analyses devoted to the problem of error measurement, focusing mostly on methods of error identification. In the analyses provided in this article, I begin with an overview of the methods and their respective advantages and drawbacks. I demonstrate that the greatest possibilities in this field (relatively speaking) lie with confirmatory factor analyses and structural models. Based on the Polish national survey research, I present data suggesting the advantage of controlling errors by using confirmatory factor analysis, which allows one to increase the validity and reliability of measurements in comparison with traditional approaches. Selected examples concern the relationship between social position and attitudes, which have always been at the heart of empirical research.

Key words: survey error; confirmatory factor analysis
The middle point in bipolar scales: Should it be included or dropped from the scale?

2002, vol. 11, pp. 45–81

**Paweł B. Sztabiński**, Institute of Philosophy and Sociology, Polish Academy of Sciences

Middle-point answers in bipolar scales measuring the attitudes of individuals are chosen by 3 to 50% of respondents. Therefore, the decision to include them as answer choices is not a light matter. There is no agreement among researchers concerning this issue. Analyses presented below show how far the introduction of a middle point on a four point scale changes the placement of the remaining answers over the remaining points, including the “It’s hard to say” answer. I also try to determine which of the scales is better, i.e. to assess the phenomenon in terms of reliability and validity. To conclude, I present an interpretation of the results by referring to a popular understanding of the scales by respondents.

Key words: attitudes; middle-point answer; bipolar scale; reliability analysis; regression analysis; discriminant analysis

Remarks on the discovery, collection and assessment of hidden and dirty data

2003, vol. 12, pp. 7–50

**Gary T. Marx**, Professor Emeritus of Sociology, MIT, USA

This article is devoted to the subject of dirty data, which is understood as secret and compromising information. The author analyzes factors which contribute to the fact that a greater number of researchers are interested in this type of data and presents typical situations which dirty data researchers may face. He also discusses a number of methodological, ethical and institutionalized forms of coercion that are at the disposal of dirty data researchers. The author distinguishes basic research techniques and compares them in terms of cost, representativeness, required skill sets and potential range of topics covered. Finally, from the perspective of sociology of knowledge, the article discusses the issues of the relationship between researchers and scientific circles, sociologists and other professionals facing the problem of dirty data and researchers and political institutions.

Key words: dirty data; ethics; sociology of knowledge
The researcher as co-author of study results

2003, vol. 12, pp. 51–83

Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

When preparing survey research, one must make a number of decisions which might affect the results of the study and which are equally justifiable from the perspective of our current methodological knowledge. The article tries to show the consequences of these choices for the research. These concern the two phases of preparation of survey research: research technique selection and questionnaire construction.

Key words: ethics; survey design

An analysis of the usefulness of the EGP approach as an indicator of social position


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The goal of this article is to present EGP: the international indicator of the social position of individuals. This is the most frequently used schema of data coding in international comparative studies concerning social stratification and class structure. We begin by discussing the theoretical foundations for its construction and operationalization in a variable form introduced to the analysis in order to answer specific problems. Next, we try to answer the question of the extent to which the EGP indicator is an adequate tool for the Polish context. Data from the Polish edition of the 2002 European Social Survey on a national population sample is the empirical basis for our analyses. Relying on this data, we first analyze the discrimination power of the EGP with respect to particular variables: social status, lifestyle and attitudes, and then we compare our results with the Polish professional classification. These analyses lead us to the conclusion that the EGP distinguishes respondents similarly to the Polish schema. In order to simplify the legibility of the EGP for the reader, we attach an SPSS file in the annex which allows one to attach it to any set of data.

Key words: social class; European Social Survey; EGP
Consistency of answers on bipolar scales with different numbers of categories


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The subject of this article is the analysis of the cognitive availability of measurement scales based on a comparison of answers which respondents give to identically formulated questions with scales that have different numbers of categories. The measure of cognitive control over the scales presented to the respondent is inferred from the consistency of his answers. A scale that is difficult to master will have answers that are inconsistent with answers given in other scales. The article first discusses the formal definition of consistency and the method of constructing a model for the level of non-accidental consistency of answers. It then presents the results of an empirical study conducted on a group of students participating in a statistical data analysis class. These initially confirm the hypothesis that the more categories there are, the more difficulty respondents have with a scale.

Key words: bipolar scale; experiment; survey design

The reasoning of the researcher and the reasoning of the respondent. Research tool adequacy

2003, vol. 12, pp. 147–175

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This article deals with the adequacy of our research tools. By differentiating the different aspects of adequacy, namely the methodological, psychological and sociological dimensions, I point to the fact that these problems pertain to the measurement tools both in a broad and in a narrow sense (the survey method as well as individual questions). In the second half of the article, after analyzing empirical data, I describe the consequences of the inadequacy of specific types of questions which nonetheless are fully acceptable from a design perspective – namely questions in which a ten point scale (from 10 to 1) is used. I rely on the results of 7 surveys conducted by a market research institute for a single project, concerning 5 very different dairy products. Each of the studies was conducted along the same pattern on a sample ranging from 300 to 450 persons. This analysis shows that there were similar patterns of response in each question which used the 10 point scale, regardless of the question subject and the type of product they concerned. The highest percentages appear on points 10, 8, 5 and 1 of the scale. This similarity suggests that all these answers carry a bias whose source is the inadequacy of the
research tool (the question). This hypothesis is supported by the results of the PGSS study, in which identical scales are used. We can therefore conclude that it is most likely the type of scale, and not the subject of the question that suggests the answer profiles of the respondents. In other words, it appears that by using this type of scale, regardless of the question subject, we obtain a multimodal characteristic pattern, and not a unimodal pattern. The type of tool (question) used was inadequate: instead of reporting the respondents’ opinions to researchers, to a certain extent, it guided them, generating a specific model for answering questions.

Key words: Polish General Social Survey (PGSS); surveys; response bias; scales; instrumental validity

The European Social Survey and other international surveys: What can one learn from comparative analysis?


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The European Social Survey (ESS) is a potentially important research undertaking for the field of social studies, and especially sociology. In order, however, to discuss the potential future gains of this study, it is worth first taking a look at other international survey research – academic and commercial – and their use. The article discusses the following research undertakings: the World Values Survey (WVS), the International Social Survey Program (ISSP), Eurobarometer (EB), the New Barometer (NB), and the Global Barometer (GLOB), International End of Year Poll (IEYP), Voice of the People (VoP) and the Pew Global Attitudes Project (GAP). ESS was compared to other projects because of the topics discussed in the questionnaires and the method of conducting the survey. The article also presents information about the availability of data from international survey research and describes the methodological challenges concerning the measurement of variables and the analysis of their causal relations.

Key words: cross-national surveys; European Social Survey; World Values Survey; International Social Survey Program; data availability

The methodology of the European Social Survey


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One of the basic goals of the ESS study is to develop standards for the preparation and realization of international studies. This article discusses ESS standards for
two stages of the study, which may potentially pose the greatest risk of errors in the results, i.e. the construction and administration of the questionnaire and research, and specifically efforts aimed at maximizing response rates.

Key words: European Social Survey; survey design

**Log-linear models for ordinal data. Some examples.**


**Dariusz Przybysz,** Institute of Philosophy and Sociology, Polish Academy of Sciences

The article presents an analysis of the joint distribution of random variables and their relationships using log-linear models. Special attention is paid to situations in which at least one variable is measured on an ordinal scale. I formulate a number of hypotheses concerning log-linear models, as well as methods for testing hypotheses concerning them. I also present examples of empirical analyses of data from the 2002 edition of the European Social Survey. These show that using information about ordering categories of one or more variables allows for the formulation of models which fit the empirical data well.

Key words: log linear models; ordinal scales; European Social Survey

**An analysis of change using latent growth curve analysis**

2004, vol. 13, pp. 87–120

**Roman Konarski,** University of Gdańsk

The traditional approach to analysis of change processes was based on the assumption that change is a series of (M)ANOVA quantum differences in the functioning of individuals between arbitrarily chosen measurement points. Such a concept of change is a model of moderate change in which inter-individual differences are examined as a residue unexplained by the (M)ANOVA model. This article suggests a latent growth curve analysis which expands on the traditional (M)ANOVA approach by characterizing change as a continuous process, with certain differentiating characteristics between persons. Such an approach to the analysis of the processes of change allows one to test developmental hypotheses referring to the correlation between initial status and the tempo of change, as well as factors explaining inter-individual differentiation in the initial status and/or tempo of change. The article gives statistical grounds for a model of latent growth curve analysis within the convention of a general model of structural equations and illustrates the implementation of this statistical model in an empirical study of the effectiveness of a dietary supplement on the cognitive functioning of persons suffering from Alzheimer’s disease. The paper
also discusses the limitations of the model of latent growth curve analysis in the analysis of incomplete developmental data, as well as research plans combining the characteristics of longitudinal and latitudinal plans.

Key words: latent growth curve analysis; MANOVA; cognitive functioning

On the need for the protection of qualitative data. From the experience of a sociologist-humanist

2005, vol. 14, pp. 7–17

Hanna Palska, Institute of Philosophy and Sociology, Polish Academy of Sciences

The article justifies the needs for the creation of a sociological archive for qualitative data in Poland. I refer to the history of archives of Polish memoirs – collected mostly by Józef Chałasiński and his disciples – which have been for the most part destroyed and scattered. Nowadays, in the age of digital technology, we must and we can gather memoirs, autobiographies, in-depth interviews, all personal documents, broadly understood. This can be done in a relatively cheap and easy manner. Securing data from qualitative surveys ought to become the final, compulsory stage of empirical fieldwork.

Key words: memoir studies; qualitative; archiving

The archive of social qualitative data: Needs, controversies, practical suggestions


Artur Kościański, Institute of Philosophy and Sociology, Polish Academy of Sciences

This article presents the basic arguments for the creation of a library (archive) of “qualitative data”, the rising controversies over this matter and suggests certain practical methodological solutions. The author relies on Robert K. Merton’s arguments, and emphasizes the need for classifying and integrating the knowledge gained from qualitative data analysis through archiving. This is how the function of “a well-ordered theoretical knowledge” will be met. Therefore, when designing an archive of qualitative data one should bear in mind, apart from the recording function of the research material gathered, other functions which should be fulfilled by sociological knowledge ordered along paradigms, i.e. a verifying function, preventing the spread of unverified conclusions; a cumulative function of interpretation of phenomena; a cross control of concepts function which allows one to go beyond often simply descriptive analyses and construct coherent theories; and finally, a codifying function, ordering the analytical process as an element
of the objectification of some of the analytical procedures. Such an archive of qualitative data would bring scientific information not just to sociology, but to different disciplines of knowledge about man.

Key words: archiving; qualitative data

**Why archive qualitative data and how it is done elsewhere in the world**

2005, vol. 14, pp. 31–52

Piotr Filipkowski, Graduate School for Social Research, Polish Academy of Sciences

The aim of this article is to spark a discussion about the creation of a Polish Archive of Qualitative Data. In the first part, I present the main arguments for the archiving and subsequent reuse of qualitative data in social sciences. I rely on Paul Thompson’s experiment – a precursor of oral history, researcher of social history, sociologist of the family and creator of the model archive of qualitative data in the UK. In subsequent parts, I present in more detail two important European archives: the British Qualidata and the German Deutsches Gedächtnis, treating them as model institutions for the Polish archive. The last section of this article is devoted to a presentation of a catalogue of the biggest European institutions archiving qualitative data – not only those with the formal status of national archives, but also of smaller ones, which remain important undertakings nonetheless. In the last section, I remind the readers of the rich Polish traditions in qualitative studies and of the first, though at present not-scientific, archiving initiatives.

Key words: archiving; qualitative data

**How to combine pre-test and pilot study? The example of the 2004 European Social Survey**

2005, vol. 14, pp. 55–75

Paweł B. Sztabiński, Institute of Philosophy and Sociology, Polish Academy of Sciences

Studies of the quantitative/survey research type are usually preceded by pilot studies. This article demonstrates how both types of studies can be combined within one research undertaking: a pre-test and pilot study. The former is carried out on a small number of samples, and its results are analyzed quantitatively. The latter is conducted on samples of several hundred persons and analyzed qualitatively. The original methodology of an initial study prepared specifically for ESS research relies on a combination of qualitative and quantitative analyses and lets us overcome the constraints of a pre-test and pilot study.

Key words: pre-test; pilot study; survey design; European Social Survey
**Why do respondents choose to participate in surveys? A comparison 1994–2004.**

2006, vol. 15, pp. 7–28

**Paweł B. Sztabiński**, Institute of Philosophy and Sociology, Polish Academy of Sciences

In 1994, I sent a questionnaire to the respondents-participants of the Polish General Social Survey. It concerned the motivations for their participation in surveys and their interpretation of its goals. I discussed its results in the 1995 edition of “ASK”. Since then, many important changes have taken place, both within society as in the field of research, which I assumed could significantly modify the results then presented. I was prompted to repeat this survey a decade later, in 2004, in conjunction with the European Social Survey. The goals of my questionnaire were similar to those of the 1994 one, namely, to determine how Polish society views survey research after a dozen years of living in a functioning democratic system and to establish what convinces respondents to participate in surveys. Because of the current significance of the second goal mentioned above, this study was broadened to include a questionnaire for respondents who had not taken part in the survey for a variety of reasons.

Key words: non-response; survey design; European Social Survey

**Number of visits and duration of surveys**

2006, vol. 15, pp. 29–49

**Henryk Domański**, Institute of Philosophy and Sociology, Polish Academy of Sciences

Relying on data from the European Social Survey I attempt to provide an answer to two questions. First, to which group of factors does respondent availability belong to (availability is defined as the number of visits attempted by the interviewer in order to establish contact). Second, to what extent do the answers of respondents depend on the point of time in which the survey is carried out. My analyses of the role of these factors are based on data from Poland. The appearance of such interdependencies would suggest that measurements are burdened with a systematic error, i.e. the changing of the context of the study. The influence of time was proof that during the research, conditions surrounding the interviews change. My analyses show that the following factors make availability more difficult: higher education, big city inhabitants and young age. In contrast, it is relatively easy to reach unemployed persons, inhabitants of the countryside, and lower-rank non-manual workers. If we consider the assumption that the date of
the interview has any independent influence over the study – it appears that such a dependency is indeed present.

Key words: non-response, interview duration, number of visits, sampling; systematic error

Using quantitative methods in marketing research in Poland

2006, vol. 15, pp. 51–73

Jolanta Perek-Białas and Urszula Korzeniecka, Jagiellonian University

When carrying out quantitative research one should apply different types of statistical methods and techniques. The number and complexity of some of these methods means that what is theoretically described in the literature is rarely used in practice. This article presents the results of a project assessing the extent to which quantitative methods are being implemented in marketing research in Poland. The analysis was based on interviews conducted with representatives of selected social and marketing research agencies in 2004. Our goal was to show (1) which of the quantitative methods are commonly used in marketing research in Poland, and which ones are not, and to identify the possible reasons for this; (2) what are the situations (and to what research problems) quantitative methods are mostly used for; (3) how the use of different quantitative methods in marketing research has changed in Poland in the last years; (4) what are the problems connected with the use of different quantitative methods and how to remedy them; (5) what are the prognostics concerning the development of research in the coming years.

Key words: statistical methods; marketing research; Poland

Methods of ecological inference in electoral research

2006, vol. 15, pp. 75–103

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In the social sciences the researcher often has a dearth of aggregated data, and no data about individuals. Conclusions from analyses of this aggregated data are, however, burdened with what was described as the “ecological fallacy” – when they concern individuals. In such instances, one can rely on methods of ecological inference which help estimate individual behaviors and characteristics with great accuracy based on aggregated data. This article presents the most popular methods of ecological inference using a regressive and logistical approach. The overview begins with an analysis of Goodman’s ecological regression, and ends with the relatively new approach known as entropy maximization. The methods presented
here are by no means exhaustive. They are, however, the most popular and most frequently discussed ones. The aim of this article is to familiarize the Polish reader with these approaches.

Key words: ecological analysis; aggregated data analysis; Goodman’s ecological regression; entropy maximization

An assessment of the quality of a scale with the Rasch model: Validity and reliability


Dorota Węziak, Szkoła Główna Handlowa, Instytut Statystyki i Demografii

The aim of this article is to present a statistical analysis method little known so far in Poland: the Rasch model, and in particular, its use in the assessment of the validity and reliability of a cumulative measurement scale. This measurement is an alternative to the methods used so far in Poland to assess validity and reliability, and described by David Magnusson, Jerzy Brzeziński, Jarosław Górnia, Andrzej Machowski and Adam Sagan among others. These methods can only be applied to scales with parallel locations, while the measurements obtained with the Rasch model can help assess scales of different intensities. The first section of this article presents the methodological basis of the Rasch model, before proceeding to examine the practical implementation of this technique. It is worth emphasizing that since Rasch’s family of models is numerous, this article focuses specifically on the rating scale model, which is useful in the measurement of latent traits on rating scales with different intensities (cumulative scales).

Key words: Rasch model; Rasch scale; Rasch ordinal scale; ordinal scale; validity of a measurement scale; reliability of a measurement scale

The impact of unfinished sections of interviews on the accuracy of statistical inference in social studies. Questionnaire surveys and telephone surveys in light of errors.


Piotr Jabkowski, Adam Mickiewicz University

The article concerns the subject of inaccessible individuals within the theory of statistical conclusion. I focus on the consequences for statistical analysis of not including non-sampling errors arising from the lack of knowledge of the distribution of opinions of persons whom for various reasons have been omitted in the research process, even though they had earlier been (randomly) chosen for the sample. The article shows that non-sampling errors arising from not conducting a part of the
sample (if they are not effectively restrained) affect the entire cognitive process to such an extent that drawing any kind of reasonable conclusions becomes practically impossible. The article comprises three interrelated parts. The first formulates the problem of not conducting a part of the sample and gives theoretical statistical foundations for further discussion. The second section provides procedures of assessing non-accidental errors of measurement arising from not conducting the initially agreed on survey sample. Part three critically analyzes two quantitative research techniques – telephone surveys and questionnaire surveys.

Key words: sampling; survey design; survey errors, telephone surveys

Computer assisted qualitative data analysis

2007, vol.16, pp. 89–114

Jacek Bieliński, Collegium Civitas, Katarzyna Iwińska, Collegium Civitas, and Anna Rosińska-Kordasiewicz, University of Warsaw

Qualitative research differs from quantitative research not only in the epistemological approach to the subject but also in the tools used. Qualitative researchers point to the importance of being “in contact with empirical material”. It is the main argument against using computers when performing analyses. Nevertheless, advanced computer tools have also been used in qualitative research for the past dozen years. Such programs are built to help and ease contact with the studied material through cataloguing, classifying and also advanced search options. They also facilitate, among other things, the exploration of phenomena, the analysis and presentation of synthetized data. This article’s main concern is to demonstrate the use of specialist computer programs in the analysis of qualitative data, and in particular two such programs: QSR N6 (formerly: NUD*IST) and ATLAS.ti.

Key words: computer analysis; qualitative data; ATLAS.ti; NUD*IST.

Excessive internet use risk scales

2007, vol. 16, pp 115–131

Katarzyna Kaliszewska, Adam Mickiewicz University

The article presents the theoretical basis and the psychometric attributes of SNUI – Excessive Internet Use Risk Scales. SNUI scales were built for the needs of empirical studies conducted in order to assess the psychological characteristics of the phenomenon of excessive use of the internet. The psychometric parameters of SNUI scales are satisfactory and allow us to believe that the tool can successfully
be used for individual research, group research and comparisons between groups over the Excessive Internet Use variable.
Key words: excessive internet use; SNUI

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