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Examining the Short-Term Dynamics of Income Mobility among Iranian Households under Stagflationary Conditions: Is Poverty a Trap?

Esmaeil Pishbahar [1] ✉, Zakieh Davoudnia [2], Mohammad Ghahremanzadeh [3], Javad Hosseinzad [4], Arash Dourandish [5]

1. Corresponding Author, Department of Agricultural Economics, Faculty of Agricultural Economics and Development, University of Tehran, Karaj, Iran. E-mail: esmaeil.pishbahar@ut.ac.ir
2. Department of Agricultural Economics, Faculty of Agriculture, University of Tabriz, Tabriz, Iran. E-mail: z.davoudniya@tabrizu.ac.ir
3. Department of Agricultural Economics, Faculty of Agriculture, University of Tabriz, Tabriz, Iran. E-mail: ghahremanzadeh@tabrizu.ac.ir
4. Department of Agricultural Economics, Faculty of Agriculture, University of Tabriz, Tabriz, Iran. E-mail: j.hosseinzad@tabrizu.ac.ir
5. Department of Agricultural Economics, Faculty of Agricultural Economics and Development,, University of Tehran, Karaj, Iran. E-mail: dourandish@ut.ac.ir

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ABSTRACT

Income mobility is a key indicator of economic dynamism and plays an important role in assessing inequality and households' opportunities for economic advancement. This study examines the patterns of intragenerational income mobility among urban and rural households in Iran during the period 2021–2023 using income decile transition matrices, the Shorrocks mobility index, and panel regression models. The results indicate that the highest degree of income movement occurs within the middle deciles, whereas the lowest and highest deciles exhibit relatively greater stability. In other words, low-income and high-income households are more likely to remain in their initial income positions than households in the middle of the income distribution. A comparison between urban and rural areas reveals a broadly similar mobility pattern, although differences exist in the magnitude of mobility and the factors determining it. Lower-income urban households experience less mobility than their rural counterparts, while rural households are more sensitive to demographic characteristics and economic conditions. The panel regression results confirm the significant roles of the household head's age, household size, asset ownership, internet access, expenditure patterns, and macroeconomic variables in shaping income positions and decile mobility. Inflation, particularly in urban areas, emerges as one of the most important barriers to upward income mobility. These findings highlight the need for targeted regional policies aimed at controlling inflation, strengthening real household incomes, improving access to assets, and expanding information infrastructure to enhance opportunities for income mobility.

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ntroduction

Income mobility, defined as the movement of individuals or households across the income hierarchy over time, is a central concept in the economics of inequality and income distribution dynamics. Unlike static approaches that measure inequality at a single point in time, income mobility provides a dynamic perspective on changes in economic position, capturing the extent to which individuals can move up or down the income ladder and escape persistently low-income states (OECD, 2018; Aaberge et al., 2002; Isaacs, 2007; Jäntti & Jenkins, 2015; Piketty et al., 2018, 2023). The concept is commonly examined through two complementary dimensions: intragenerational and intergenerational mobility. Intragenerational mobility refers to changes in an individual's or household's income position over the life course and reflects the role of education, work experience, and access to economic opportunities in shaping upward mobility. In contrast, intergenerational mobility captures the extent to which economic status is transmitted across generations by comparing parents' and children's income positions, thereby reflecting the persistence of socioeconomic advantage or disadvantage (Solon, 2002). Together, these dimensions highlight income mobility as a key indicator of social justice and equality of opportunity.

Income mobility is also widely used as an indicator of the effectiveness of economic and social policies. Although redistributive, educational, and tax policies are typically designed to reduce inequality, their ultimate success depends on whether they enhance mobility. Persistently low mobility, by contrast, may reflect structural inefficiencies in labor markets or social protection systems (Black & Devereux, 2011; Jäntti & Jenkins, 2015; Rohenkohl, 2019). Higher levels of mobility are further associated with greater economic resilience, as societies that allow both upward and downward movements are better able to absorb shocks while promoting productivity, improving living standards, and expanding economic participation (Aaberge et al., 2002; Breen et al., 2016; Isaacs, 2007; Piketty et al., 2018).

In the Iranian context, income mobility is closely linked to macroeconomic conditions. Existing evidence suggests that high inflation and income inequality reduce absolute mobility among urban households, while spatial disparities between urban and rural areas, rural inequality, wage differentials, and climate-related shocks further constrain mobility pathways. At the same time, some long-run evidence indicates partial income convergence, which has created limited opportunities for upward mobility among low-income households. Nevertheless, structural rigidities in the labor market, particularly low wage levels, continue to restrict upward income mobility (Shahiki & Sheidaei, 2022).

Figure 1 depicts the joint evolution of real per capita income and inflation in Iran over the period 2011–2024. The figure shows a predominantly inverse relationship between the two variables, where periods of rising inflation are generally associated with weaker growth in real income. A temporary improvement in real income is observed following the implementation of the Joint Comprehensive Plan of Action (JCPOA) in 2015, reflecting a short-lived easing of macroeconomic constraints. However, this improvement was reversed after the U.S. withdrawal from the JCPOA in 2018 and the subsequent reimposition of sanctions, which coincided with a marked decline in real per capita income. Overall, these patterns highlight the role of macroeconomic shocks in shaping household income dynamics and underscore their implications for welfare and economic opportunity. This context provides a foundation for examining how macroeconomic instability may influence income mobility and households' ability to adjust to adverse economic conditions.

While these macroeconomic trends define the broader economic environment, their effects on income mobility are transmitted through household-level socioeconomic mechanisms rather than operating directly. In this regard, human capital, social capital, and access to economic opportunities represent key channels through which macroeconomic conditions influence mobility (Becker et al., 2018). From the perspective of human capital theory, education, skills, and employment status play

a central role in shaping income mobility by enhancing productivity, improving labor market competitiveness, and expanding access to better employment opportunities (Mirfardi et al., 2021).

In addition, social capital constitutes an important mechanism of mobility. Family networks, social ties, and interpersonal relationships particularly in the context of rural-to-urban migration can reduce job-search costs, facilitate access to labor market information, and lower entry barriers to employment (Lin & Huang, 2005; Mirfardi et al., 2021). Beyond social capital, access to economic resources and infrastructure also plays a critical role in shaping mobility prospects by influencing employment choices, investment capacity, and the ability of households to exploit regional economic opportunities (OECD, 2022; Sabaghi, 2020). Accordingly, income mobility should be understood as the outcome of interactions between household characteristics and broader spatial, institutional, and economic opportunity structures, rather than merely as a reflection of observable differences across population groups.

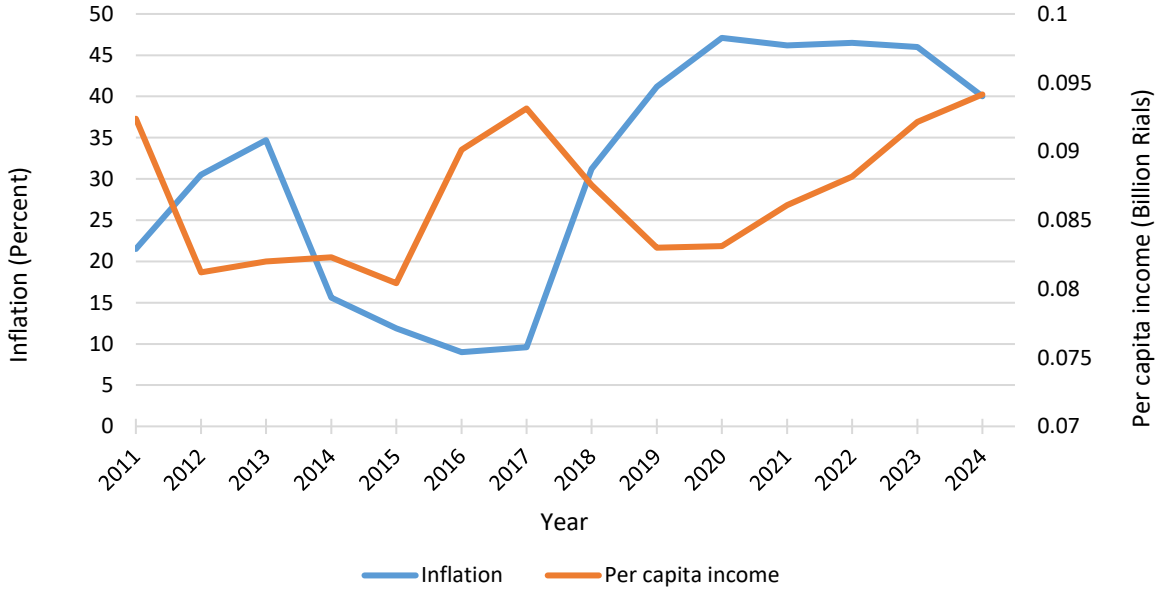


Fig. 1. Real Per Capita Income and Inflation from 2011 to 2024
Source: Authors' own elaboration based on Statistical Center of Iran (2025) data.

Recent trends in income and inequality in Iran further highlight the economy's vulnerability to macroeconomic conditions. Household income data for both urban and rural areas over the period 2011–2024 show substantial fluctuations in real per capita income, while also concealing more gradual changes in the underlying income distribution. Although the Gini coefficient remained relatively stable approximately 0.35–0.40 for urban households and 0.32–0.38 for rural households' segments of the population, particularly low-income groups, experienced declining purchasing power and a persistent deterioration in their relative income positions (OECD, 2017; OECD, 2022). These findings suggest that conventional cross-sectional measures of income inequality, such as mean income and the Gini coefficient, may mask important dynamics in households' economic trajectories. Without considering income mobility, such indicators provide only a partial picture of inequality and welfare, as they fail to capture movements within the income distribution over time (Isaacs, 2007; Piketty et al., 2018; Berman, 2022).

In the Iranian context, the agricultural sector plays a central role not only as a major source of income and employment in rural areas, but also as a key determinant of aggregate economic performance and rural livelihoods. The income structure of rural households heavily dependent on agriculture, livestock, and related activities makes them particularly vulnerable to production volatility, price shocks, climate variability, and changes in government support policies. These factors

directly affect income stability and households' capacity to move across the income distribution (Jani & Khodaverdizadeh, 2019; Haggblade et al., 2010). From this perspective, developments in the agricultural sector are likely to shape rural income mobility patterns and may either exacerbate or mitigate the urban–rural income gap.

Rural-to-urban migration has also emerged as an important channel of economic mobility in recent decades. Driven primarily by disparities in employment opportunities, income levels, and infrastructure, such population movements not only reallocate labor from agriculture to industrial and service sectors, but may also generate long-term changes in income trajectories and contribute to upward mobility among households (Mirfardi et al., 2021; Shahiki & Sheidaei, 2022). Accordingly, income mobility in rural areas should be examined in connection with structural transformations in agriculture and migration processes to provide a more comprehensive understanding of development dynamics.

Despite its importance, a substantial body of domestic research in Iran has largely focused on periods preceding recent economic developments. For example, Amanzadeh and Heydari (2023) analyze the 2011–2019 period, while Salehi-Isfahani and Majbouri (2013) focus on 1992–1995; both studies document relatively high short-term income mobility. At the international level, Berman (2022) attributes the observed decline in absolute mobility to slower income growth and rising inequality, whereas Doruk et al. (2022) emphasize the importance of accounting for regional and social heterogeneity an issue particularly relevant in Iran given pronounced urban–rural disparities.

Against this backdrop, and given persistent urban–rural inequalities as well as the role of economic, social, and household-level factors, analyzing income mobility in Iran has become increasingly important. Such analysis provides a clearer understanding of household movements within the income distribution and of how economic conditions and social structures shape opportunities for income advancement. In the Iranian context, severe macroeconomic fluctuations, chronic inflation, and structural changes in the labor market have contributed to income instability, generating substantial short-term movements in household income positions. Accordingly, short-term income mobility analysis is particularly relevant as it captures households' responses to economic shocks and reveals adjustment dynamics over time.

Building on this context, this study examines whether, under stagflationary conditions in Iran, households in lower income deciles face greater constraints in achieving upward mobility or whether they are still able to improve their income positions during the period under study. It also investigates differences in mobility patterns between urban and rural areas and explores the channels through which economic, social, and demographic factors influence the likelihood of upward or downward income transitions. It is expected that, under persistent inflation and macroeconomic volatility, income mobility is unevenly distributed across income groups, and that both the intensity and mechanisms of mobility differ between urban and rural households.

Given that the analysis is limited to the period 2021–2023, concepts such as "poverty traps" or "persistence of poverty" are interpreted in a short-run sense, referring to the relative stability of households' income positions within this restricted time window. Accordingly, the findings should not be interpreted as evidence of long-run income persistence or structural mobility patterns. Robust conclusions regarding long-term dynamics require longitudinal data covering a substantially longer period.

Methodology

Data Source

The data used in this study are drawn from the Household Expenditure and Income Survey (HEIS) conducted by the Statistical Center of Iran. This survey has been implemented annually since 1984 and represents one of the most comprehensive micro-level datasets for analyzing household economic and welfare conditions. It includes detailed information on monetary and non-monetary income, consumption expenditures, household characteristics, and indicators of economic well-being.

The analysis covers the period 2021–2023 and includes both urban and rural households across the country. Since 2010, the HEIS has been conducted as a rotating panel survey, in which a subset of households is re-interviewed in consecutive waves, and each household may remain in the sample for up to three years. This structure enables the analysis of short-term dynamics in household welfare and income mobility, although the panel is unbalanced due to household attrition across waves.

From an econometric perspective, if the probability of remaining in the sample is correlated with initial household characteristics, estimates of income mobility may suffer from sample selection bias. To address this issue, attrition probabilities are explicitly modeled, and Inverse Probability Weighting (IPW) is employed to correct for potential non-random sample selection.

Household identification is primarily based on residential address and geographic location. However, residential mobility may lead to misclassification of households across survey waves. To reduce this risk, the age of the household head is additionally used as a complementary identifier alongside spatial information.

Given the well-documented limitations of survey-based income data and potential reporting errors, particularly at the upper tail of the distribution, this study uses per capita household expenditure as a proxy for income. Consumption is generally more stable than income and provides a more reliable indicator of long-term welfare. However, it may yield more conservative estimates of income mobility, particularly in higher deciles where consumption adjustments to income changes are not immediate or proportional. The use of consumption-based measures is widely established in the income mobility and welfare economics literature.

Data Preparation and Estimation Strategy

The dataset was subjected to a systematic cleaning procedure to ensure consistency and reliability. Observations with missing or inconsistent values in key variables, including per capita expenditure and household characteristics, were excluded from the sample.

To mitigate the influence of extreme values, observations in the upper and lower tails of the per capita expenditure distribution were trimmed. This procedure reduces the impact of outliers on mobility estimates while preserving the overall structure of the distribution.

All monetary variables were deflated using the Consumer Price Index (CPI) and expressed in constant prices. As a result, changes in per capita expenditure reflect real variations in welfare rather than price level fluctuations.

To account for panel attrition, a binary indicator was constructed that takes the value of one if a household is observed in two consecutive waves and zero otherwise. A probit model was then estimated to model the probability of sample retention, using the age and education of the household head, housing and vehicle ownership, and province of residence as explanatory variables.

Based on predicted probabilities from the probit model, IPW were constructed to adjust for potential non-random attrition. Households with a lower probability of remaining in the sample are assigned higher weights in the analysis. The weighted data are then used to rank households according to per capita expenditure and to assign them into ten equal-sized groups (deciles). This procedure enables the identification of movements across expenditure deciles and the measurement of short-term income mobility while improving the representativeness of the sample.

All data processing, including construction of transition matrices, estimation of econometric models, and implementation of diagnostic tests, was conducted using Python, R (RStudio), and Stata. The use of multiple software environments enhances computational efficiency, flexibility, and reproducibility of the empirical analysis.

Mobility Indices

To quantify income mobility and enable comparisons across groups and time periods, this study employs numerical mobility indices in addition to transition matrices. While transition matrices describe movements across expenditure deciles, they do not provide a scalar measure of mobility intensity. Mobility indices therefore summarize transition dynamics in a single metric, allowing consistent comparisons across time and subgroups.

Among the most widely used measures is the Shorrocks index (Shorrocks, 1978), which captures the extent to which a distribution departs from perfect immobility. This index is defined in Equation (1).

$$M_S = \frac{n - Tr(\rho)}{n - 1} \quad (1)$$

where n denotes the number of income deciles and $Tr(\rho)$ represents the trace of the transition matrix. The diagonal elements capture the proportion of households that remain in their initial income decile over time; hence, lower values of the trace indicate higher mobility across deciles and, consequently, a higher value of the Shorrocks index. The index ranges between zero and one, where zero corresponds to perfect immobility and values closer to one indicate greater mobility, making it suitable for comparisons of mobility intensity across groups and time periods (Shorrocks, 1978).

In addition to the Shorrocks index, the Prais index is employed as a complementary measure of income mobility. Drawing directly on the structure of the transition matrix, this index focuses on its diagonal elements to capture the average probability of exiting the initial income position. For a decile-based transition matrix, the Prais index is defined in Equation (2).

$$M_p = 1 - \frac{\sum_{i=1}^{10} \rho_{ii}}{n} \quad (2)$$

In this context, P_{ii} denotes the probability of a household remaining in the same income decile over time. The index therefore provides an indirect measure of mobility by capturing exits from the initial decile and transitions to other income groups. Higher persistence within the same decile implies lower income mobility and a smaller value of the Prais index, whereas greater movement across deciles increases its value (Bibby, 1975).

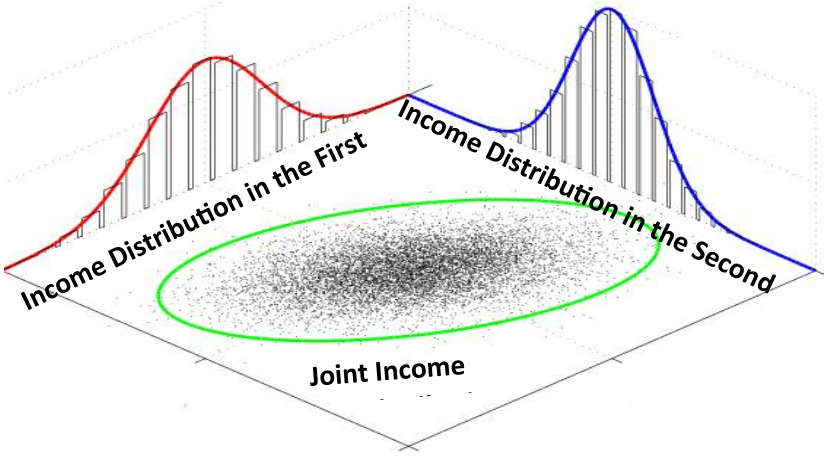
In addition to scalar mobility measures, a symmetry test of the transition matrix is employed to examine its statistical structure. This test assesses whether the probability of moving from decile i to decile j is equal to the probability of the reverse transition from j to i. Deviations from symmetry may indicate asymmetric mobility patterns, such as differences between upward and downward mobility. Incorporating this test strengthens the empirical analysis and allows for the identification of structural heterogeneity in mobility processes (Formby et al., 2004).

Transition matrix

To measure income mobility between two consecutive years, a decile-based transition matrix is employed. The matrix is of dimension $n \times n$, where n denotes the number of income deciles, and each element represents the probability of a household moving from decile i in the base year to decile j in the subsequent year.

As illustrated in Fig 2, the diagonal elements (P_{ii}) capture income persistence, representing the share of households that remain in the same income decile over time. Off-diagonal elements reflect mobility across the income distribution: entries above the main diagonal indicate upward mobility,

while those below the diagonal capture downward mobility. This framework allows for the analysis of income distribution dynamics, comparison of mobility intensity and direction, and examination of heterogeneity in mobility patterns across household groups (Cherubini et al., 2004; Nelsen, 2006; Fields & Ok, 1999; Chetty et al., 2014).



Income Distribution in the Second Year

Income Distribution in the First Year	0	1	2	3	4	5	6	7	8	9
0	P_{00}	P_{01}	P_{02}	P_{03}	P_{04}	P_{05}	P_{06}	P_{07}	P_{08}	P_{09}
1	P_{10}	P_{11}	P_{12}	P_{13}	P_{14}	P_{15}	P_{16}	P_{17}	P_{18}	P_{19}
2	P_{20}	P_{21}	P_{22}	P_{23}	P_{24}	P_{25}	P_{26}	P_{27}	P_{28}	P_{29}
3	P_{30}	P_{31}	P_{32}	P_{33}	P_{34}	P_{35}	P_{36}	P_{37}	P_{38}	P_{39}
4	P_{40}	P_{41}	P_{42}	P_{43}	P_{44}	P_{45}	P_{46}	P_{47}	P_{48}	P_{49}
5	P_{50}	P_{51}	P_{52}	P_{53}	P_{54}	P_{55}	P_{56}	P_{57}	P_{58}	P_{59}
6	P_{60}	P_{61}	P_{62}	P_{63}	P_{64}	P_{65}	P_{66}	P_{67}	P_{68}	P_{69}
7	P_{70}	P_{71}	P_{72}	P_{73}	P_{74}	P_{75}	P_{76}	P_{77}	P_{78}	P_{79}
8	P_{80}	P_{81}	P_{82}	P_{83}	P_{84}	P_{85}	P_{86}	P_{87}	P_{88}	P_{89}
9	P_{90}	P_{91}	P_{92}	P_{93}	P_{94}	P_{95}	P_{96}	P_{97}	P_{98}	P_{99}

Fig. 2. Transition Matrix of the Joint Income Distribution
Source: Authors' own calculations

Regression model

To identify the determinants of household income mobility, this study employs panel data regression models. The panel structure allows for controlling unobserved time-invariant heterogeneity across households, thereby improving the consistency and efficiency of the estimated coefficients. Two separate models are specified. The first model ($Y_{1,it}$) represents the proportion of households that move to a higher expenditure decile, capturing relative upward mobility. The second model ($Y_{2,it}$) measures the proportion of households experiencing an increase in real income, reflecting absolute income mobility.

The use of panel data methods for analyzing income mobility is well established in the empirical literature (e.g., Shi et al., 2010; Elouardighi, 2011). Previous studies have also employed alternative econometric approaches, including quantile regression, copula-based models, Tobit models, and pseudo-panel techniques, depending on the research objective and data structure (Aydemir et al., 2009; Kano, 2009; Salehi-Isfahani & Majbouri, 2013; Raghfar & Babapour, 2014; Fotras & Shahbazi, 2014, 2015).

Consistent with the empirical framework, the explanatory variables comprise both household-level socioeconomic characteristics and macroeconomic indicators. Household-level variables include per capita expenditure, the age and marital status of the household head, household size, dwelling area, vehicle ownership, and internet access. Macroeconomic variables include the inflation rate and the Gini coefficient, capturing the broader economic environment in which household income mobility occurs.

Given the importance of residential structure and sectoral employment in shaping mobility outcomes, the model also incorporates indicators for urban–rural residence and employment in the agricultural sector. Including these variables allows the analysis to account for spatial and sectoral heterogeneity that may influence patterns of income mobility. The final regression specifications are presented in Equations (3) and (4).

$$Y_{1,it} = \beta_0 + \beta_1 \text{Expenditure}_{it} + \beta_2 \text{Age}_{it} + \beta_3 \text{Married}_{it} + \beta_4 \text{Hsize}_{it} + \beta_5 \text{Space}_{it} + \beta_6 \text{Vehicle}_{it} + \beta_7 \text{Internet}_{it} + \beta_8 \text{Inflation}_{t} + \beta_9 \text{Gini}_{t} + \varepsilon_{it} \quad (3)$$

$$Y_{2,it} = \beta_0 + \beta_1 \text{Expenditure}_{it} + \beta_2 \text{Age}_{it} + \beta_3 \text{Married}_{it} + \beta_4 \text{Hsize}_{it} + \beta_5 \text{Space}_{it} + \beta_6 \text{Vehicle}_{it} + \beta_7 \text{Internet}_{it} + \beta_8 \text{Inflation}_{t} + \beta_9 \text{Gini}_{t} + \varepsilon_{it} \quad (4)$$

During the model-building process, a broader set of explanatory variables was initially considered. The final specification was determined based on a combination of theoretical relevance, econometric diagnostics, and model parsimony. Variables that exhibited limited explanatory contribution or introduced multicollinearity without improving overall model performance were excluded from the final specification. Consequently, the reported models retain only those variables that are theoretically justified and contribute meaningfully to explaining household income mobility.

Fig. 3. Research Methodology Flowchart

Source: Authors' own calculations

Results and discussion

To provide a clear overview of the research design and empirical workflow, Figure 3 presents a flowchart summarizing the main stages of the study. The flowchart outlines the complete analytical process, from the extraction of raw data from the HEIS through data preprocessing and cleaning to the econometric analyses, including probit estimation, the construction of IPW, and the analysis of income transition matrices. This workflow illustrates the logical sequence of the empirical procedures adopted to estimate household income mobility.

Figure 4 presents the transition matrices for rural and urban households between 2021 and 2022. Each cell reports the percentage of households moving from a given expenditure decile in the base year to another decile in the subsequent year, thereby offering a granular characterization of short-term income mobility across the distribution.

The transition matrix of income deciles indicates substantial persistence in the lower part of the distribution. Approximately 41 percent of rural households and 48 percent of urban households in the first decile remain in the same income group between 2021 and 2022. Although more than half of households appear to exit the bottom decile, most of these movements are concentrated in the adjacent decile, with very limited transitions to higher income groups. This pattern suggests that observed

mobility at the lower tail primarily reflects short-term fluctuations around decile thresholds rather than sustained upward mobility.

A similar pattern is observed in the upper tail of the distribution, where more than 43 percent of rural households and nearly 47 percent of urban households in the top decile remain in their initial position. When movements occur, they are mainly directed toward the ninth and eighth deciles. In contrast, the middle deciles exhibit the highest degree of mobility, consistent with the overall distributional structure and the patterns illustrated in Figure 5.

Figure 6 presents the transition matrices of income deciles for rural and urban households between 2022 and 2023. Consistent with previous periods, the highest degree of mobility is observed in the middle of the income distribution, whereas both the lower and upper tails exhibit relatively high persistence. Approximately 39 percent of rural households and nearly 48 percent of urban households remain in the first decile, indicating limited upward mobility among low-income households. In the top decile, more than 39 percent of rural households and around 43 percent of urban households retain their position, with most transitions concentrated in adjacent deciles, reflecting substantial persistence among high-income households.

Overall, although mobility exists across deciles, the income distribution is characterized by considerable stability at both tails, with restricted upward and downward movements among households at the extremes. This pattern is also clearly illustrated in Figure 7.

To examine symmetry in income mobility and test whether upward and downward transitions across adjacent deciles occur with equal probability, symmetry and marginal homogeneity tests (Stuart–Maxwell tests) are applied to the transition matrices. For rural households in the 2020–2023 period, the chi-square statistic for the symmetry test is 43.92, while the marginal homogeneity statistic is 5.21. Both statistics are below the corresponding critical values at the 5 percent significance level; therefore, the null hypotheses of symmetry and marginal homogeneity cannot be rejected. Similar results are obtained for rural households in 2021–2022, as well as for urban households in both periods, with no statistically significant evidence of asymmetric mobility patterns.

These findings suggest that income transitions are broadly symmetric over the observed periods, with no systematic dominance of downward over upward mobility or vice versa. Accordingly, there is no statistical evidence of persistent asymmetric mobility patterns in the form of structural downward bias across income deciles.

Following the descriptive analysis, Shorrocks and Prais mobility indices are computed to provide a concise and comparable summary measure of overall income mobility. These indices aggregate information from the transition matrices into scalar measures, allowing for systematic comparison between urban and rural areas. The results indicate relatively high levels of income mobility in both regions, with Shorrocks indices ranging from 0.82 to 0.83 and Prais indices between 0.74 and 0.75 in rural areas, compared to 0.81–0.82 and 0.73 in urban areas, respectively.

Nevertheless, when interpreted alongside the transition matrices, these indices suggest that observed mobility is primarily driven by movements within the middle of the income distribution, while both tails exhibit substantial persistence. Although the aggregate measures point to relatively high mobility, this pattern largely reflects turnover in middle deciles rather than widespread transitions across the entire distribution.

To examine the socioeconomic determinants of household position and income mobility across urban and rural areas, this study employs panel data models with fixed and random effects. This approach allows for controlling unobserved time-invariant heterogeneity and provides consistent estimates of the effects of key explanatory variables, including the age and marital status of the household head, household size, asset ownership, internet access, inflation, the Gini coefficient, and household expenditure patterns. The Gini coefficient is calculated separately for each province, thereby capturing spatial heterogeneity in income inequality across regions.

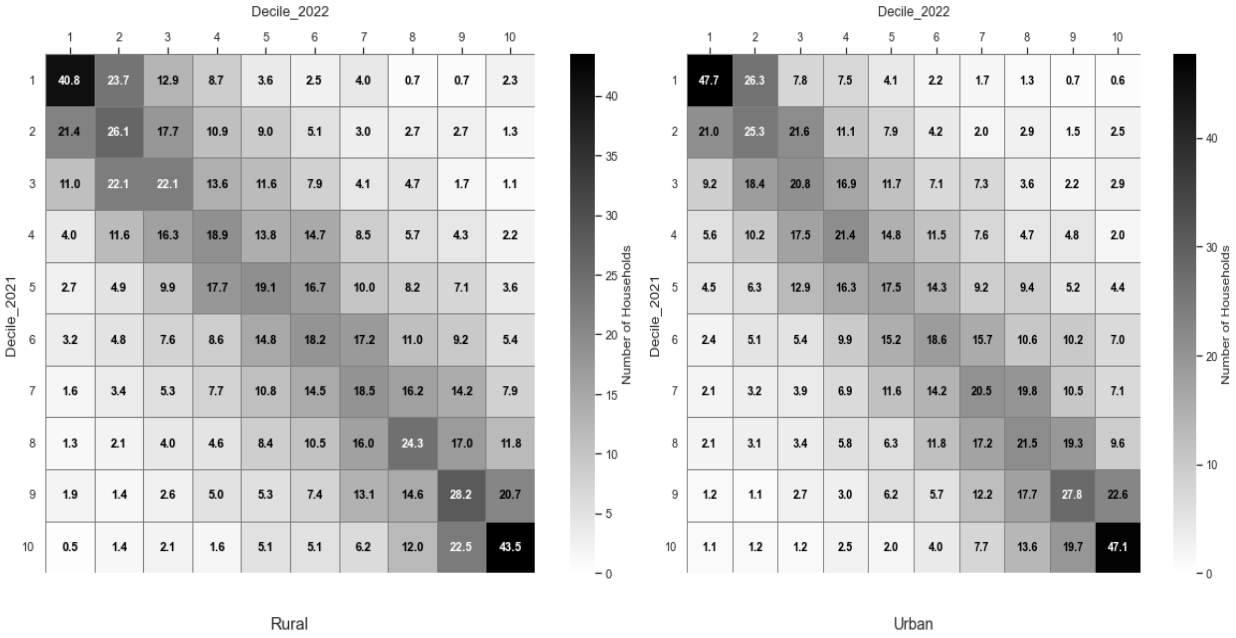


Fig. 4. Transition Matrices of Income Deciles for Rural and Urban Households over Two Consecutive Years, 2021–2022 (Percent)

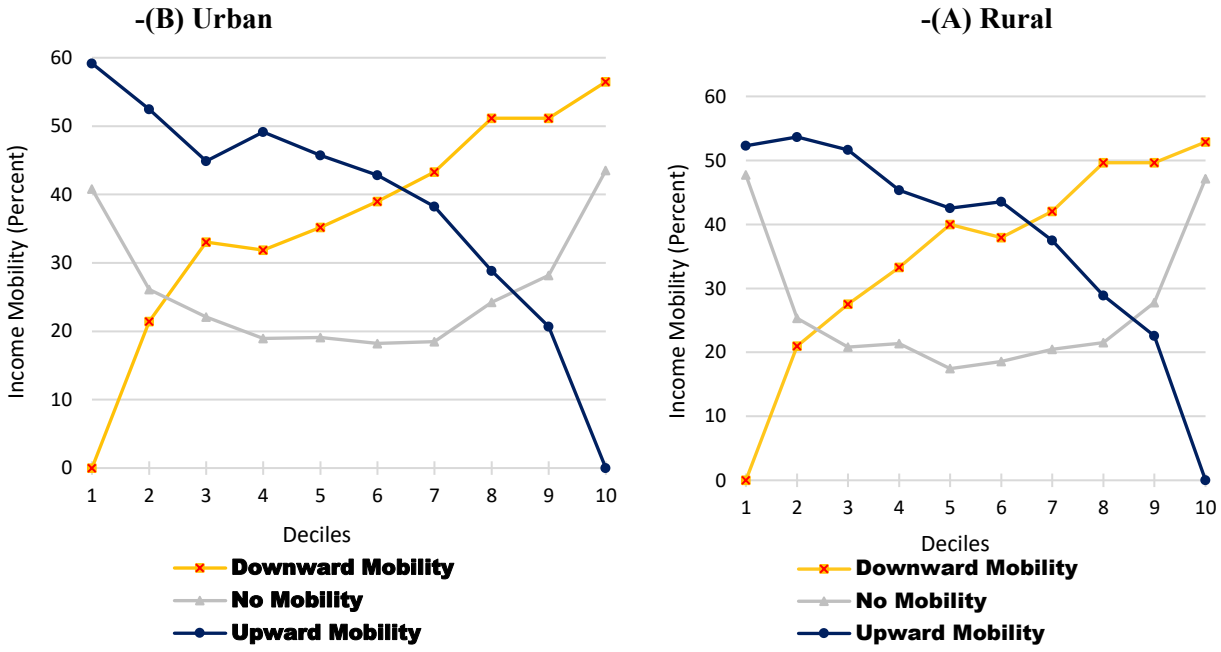


Fig. 5. Income Decile Mobility of Rural and Urban Households over Two Consecutive Years, 2021–2022 (Percent)
Source: Authors' own calculations

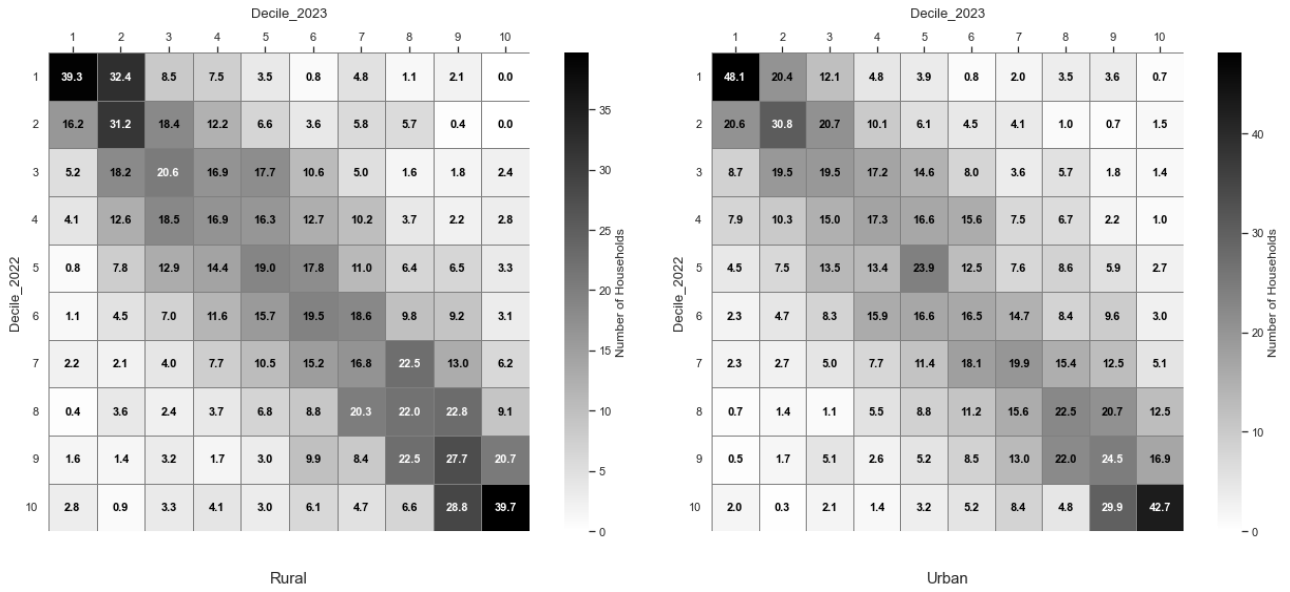


Fig. 6. Transition Matrices of Income Deciles for Rural and Urban Households over Two Consecutive Years, 2022–2023 (Percent)

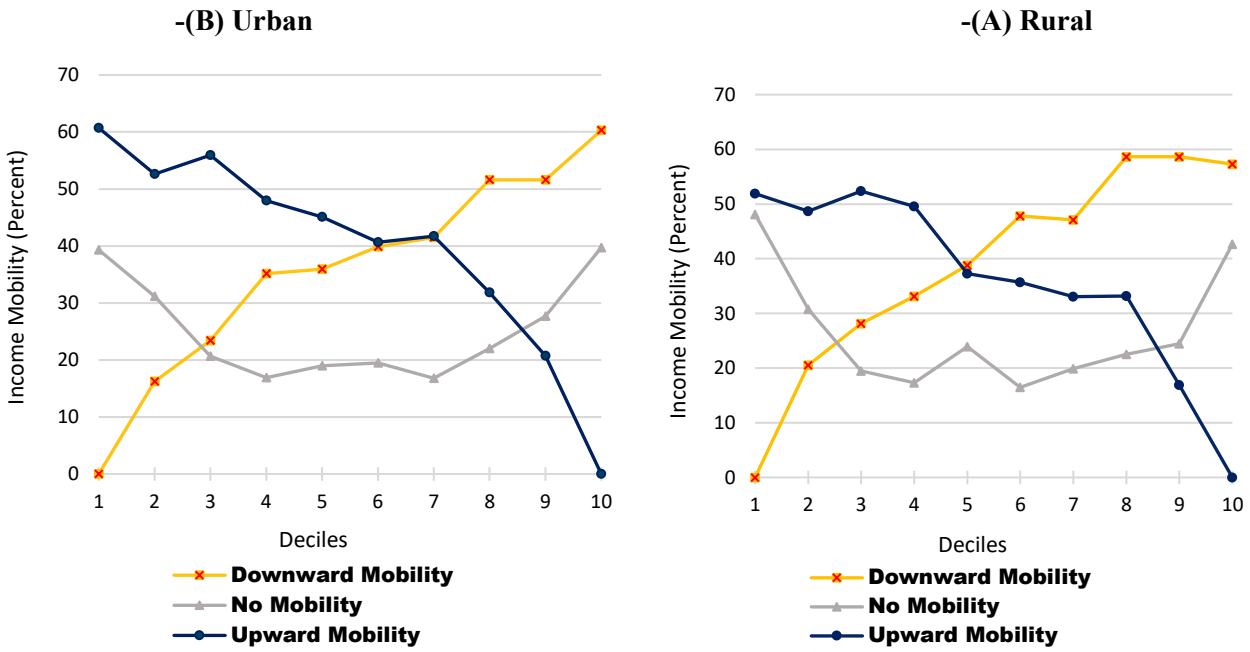


Fig. 7. Income Decile Mobility of Rural and Urban Households over Two Consecutive Years, 2022–2023 (Percent)
Source: Authors' own calculations

Table 1 reports the estimated determinants of household income position in rural and urban areas. In rural areas, household head age and household size are negatively associated with income deciles, whereas asset ownership and internet access have positive and statistically significant effects. Inflation is negatively associated with income position, while the provincial Gini coefficient is positively related to income mobility. Higher expenditures on food, health, education, and recreation are also associated with higher income deciles. For urban households, the age of the household head likewise has a negative effect, whereas household size plays a smaller role. Indicators of household welfare and access to information including residential location, asset ownership, and internet access are positively associated with income position and upward mobility. Inflation remains negatively associated with mobility, while greater expenditures on education, health, investment, and recreation are linked to higher income deciles.

Table 2 presents the regression results for household income mobility across expenditure deciles. In rural areas, household head age and household size reduce the likelihood of upward mobility, whereas asset ownership and the provincial Gini coefficient have positive effects. Inflation is not significantly associated with mobility. In urban areas, a younger household head, household size, and indicators of household welfare and access to information facilitate upward mobility, whereas inflation remains a significant constraint. Higher expenditures on education, health, investment, and recreation are also positively associated with transitions to higher income deciles.

Taken together, the results of Tables 1 and 2 reveal important urban–rural differences in the determinants of household income position and mobility. Welfare-related assets and access to information play a more prominent role in urban areas, whereas provincial income inequality is more strongly associated with mobility in rural areas. Inflation exerts a stronger negative effect on household income position than on mobility, particularly in rural areas. Hausman test results support the use of fixed-effects panel models for all specifications.

Despite these findings, the results should be interpreted in light of several limitations. The analysis is based on a three-year observation period and therefore captures only short-term income mobility; assessing long-run mobility requires longitudinal data spanning a substantially longer period. In addition, the analysis is constrained by the variables available in the HEIS. Although the survey provides rich socioeconomic information, it does not capture all determinants of household income mobility. Factors such as social capital, the quality of social networks, individual skills and productivity, and unexpected economic shocks are not directly observed and therefore cannot be incorporated into the empirical models. Consequently, part of the observed variation in household income mobility may be attributable to these unobserved factors.

Table 1. Panel regression of socio-economic variables on urban and rural income deciles (2021–2023)

VARIABLES	Rural		Urban	
	Model (1) FE	**Model (1) RE**	**Model (1) FE**	**Model (2) RE**
Age	-0.55***	-0.00**	-0.49***	-0.00
	(0.02)	(0.00)	(0.02)	(0.00)
Household Size	-0.97***	-0.53***	-0.13	-0.51***
	(0.08)	(0.02)	(0.11)	(0.02)
Space (m^2)	0.00	0.01***	0.00***	0.01***
	(0.00)	(0.00)	(0.00)	(0.00)
Marital	-0.48**	0.46***	-0.33	0.14*
	(0.22)	(0.08)	(0.23)	(0.08)
Vehicle	0.54***	0.63***	0.33***	0.50***
	(0.08)	(0.05)	(0.07)	(0.05)
Internet	0.20***	0.44***	0.18**	0.37***
	(0.06)	(0.05)	(0.08)	(0.06)
Inflation	-0.03***	-0.09***	-0.07***	-0.11***
	(0.01)	(0.01)	(0.01)	(0.01)
Gini	-0.50	2.89***	1.97**	0.26
	(1.02)	(0.66)	(0.85)	(0.48)
Food Expenditures	0.68***	0.65***	0.59***	0.48***
	(0.03)	(0.02)	(0.03)	(0.02)
Beverages Expenditures	1.12***	1.18***	0.48**	0.46**
	(0.16)	(0.15)	(0.23)	(0.20)
Clothing Expenditures	0.82***	0.88***	0.58***	0.68***
	(0.06)	(0.06)	(0.05)	(0.05)
Housing Expenditures	0.31***	0.36***	0.26***	0.30***
	(0.05)	(0.04)	(0.02)	(0.02)
Household Equipment Expenditures	0.77***	0.86***	0.45***	0.60***
	(0.14)	(0.13)	(0.11)	(0.12)
Health Expenditures	0.72***	0.71***	0.59***	0.62***
	(0.05)	(0.04)	(0.04)	(0.04)
Transportation Expenditures	0.43***	0.30***	0.71***	0.57***
	(0.10)	(0.10)	(0.11)	(0.10)
Communication Expenditures	0.18	1.66***	1.46***	2.98***
	(0.48)	(0.43)	(0.39)	(0.37)
Recreation Expenditures	0.73**	0.77***	0.75***	0.80***
	(0.29)	(0.28)	(0.25)	(0.24)
Hotels & Restaurants Expenditures			0.56***	0.46***
			(0.09)	(0.09)
Education Expenditures	0.66***	0.71***	0.60***	0.66***
	(0.02)	(0.02)	(0.02)	(0.02)
Investment Expenditures	0.70***	0.76***	0.60***	0.64***
	(0.03)	(0.03)	(0.03)	(0.03)
Constant	35.04***	5.50***	29.26***	6.62***
	(1.33)	(0.35)	(1.24)	(0.32)
R-squared	0.58	0.58	0.61	0.61
Observations	4,845		4,518	
Number of ID	1,615		1,506	

Note: Household expenditures are expressed in million Iranian rials (IRR). Standard errors are reported in parentheses. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$.

Source: Authors' own calculations.

Table 2. Panel regression of socio-economic variables on changes in household income deciles (urban and rural, 2021–2023)

VARIABLES	Rural		Urban	
	Model (1) FE	Model (1) RE	Model (1) FE	Model (2) RE
Age	-0.91***	-0.01*	-0.76***	-0.00
	(0.16)	(0.00)	(0.15)	(0.00)
Household Size	-0.89***	0.14***	0.90**	0.23***
	(0.33)	(0.04)	(0.40)	(0.04)
Space (m^2)	-0.00	-0.01***	0.00	-0.00***
	(0.00)	(0.00)	(0.00)	(0.00)
Marital	-0.45	-0.35***	-0.70	-0.34***
	(0.69)	(0.11)	(0.74)	(0.11)
Vehicle	0.64***	-0.26***	0.81***	-0.22***
	(0.24)	(0.08)	(0.23)	(0.08)
Internet	0.19	-0.16*	0.52**	-0.26***
	(0.19)	(0.09)	(0.25)	(0.10)
Inflation	-0.01	-0.03***	-0.06**	-0.04***
	(0.02)	(0.01)	(0.03)	(0.01)
Gini	14.60***	-5.13***	1.87	-1.64**
	(3.24)	(0.98)	(2.90)	(0.77)
Food Expenditures	0.68***	0.30***	0.80***	0.30***
	(0.07)	(0.04)	(0.07)	(0.04)
Beverages Expenditures	1.45***	0.56**		
	(0.43)	(0.22)		
Clothing Expenditures	0.79***	0.34***	0.84***	0.31***
	(0.16)	(0.10)	(0.14)	(0.08)
Housing Expenditures	0.50***	-0.07	0.20***	0.02
	(0.14)	(0.06)	(0.07)	(0.03)
Household Equipment Expenditures	0.96***	0.24	0.58*	0.19
	(0.36)	(0.23)	(0.31)	(0.21)
Health Expenditures	1.00***	0.53***	0.70***	0.46***
	(0.12)	(0.07)	(0.09)	(0.06)
Transportation Expenditures	0.55**	0.36**	0.93***	0.06
	(0.27)	(0.16)	(0.29)	(0.17)
Communication Expenditures	-0.27	-2.60***	1.02	-0.10
	(1.56)	(0.81)	(1.16)	(0.64)
Recreation Expenditures	1.24*	0.60	1.21	-0.41
	(0.74)	(0.44)	(0.83)	(0.49)
Hotels & Restaurants Expenditures	1.35**	0.77**	0.80***	0.56***
	(0.55)	(0.34)	(0.21)	(0.14)
Education Expenditures	0.85***	0.42***	0.76***	0.32***
	(0.06)	(0.03)	(0.05)	(0.03)
Investment Expenditures	0.96***	0.59***	0.71***	0.51***
	(0.07)	(0.05)	(0.09)	(0.06)
Constant	43.85***	2.68***	35.21***	1.58***
	(6.01)	(0.57)	(7.47)	(0.54)
R-squared	0.34	0.34	0.37	0.34
Observations	3,230		3,012	
Number of ID	1,615		1,506	

Note: Household expenditures are expressed in million Iranian rials (IRR). Standard errors are reported in parentheses. *** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$.
Source: Authors' own calculations.

Conclusion

The findings of this study indicate that the pattern of income mobility among Iranian households during the period 2021–2023 was characterized by relative stability in both urban and rural areas. The income decile transition matrices show that approximately 41% of rural households and 48% of urban households remained in the lowest income decile, a finding consistent with that of Salehi-Isfahani and Majbouri (2013), who also reported limited income mobility among low-income households. The results further indicate that households located at the lower and upper ends of the income distribution

experienced less change in their income position than those in the middle deciles. This pattern differs from the evidence reported for some developed countries, including the Scandinavian countries, which exhibit substantially higher levels of income mobility (Aydemir et al., 2009).

The regression results show that educational expenditure, as a proxy for human capital investment, has a positive and statistically significant effect on upward movement across income deciles, highlighting the importance of investment in education for improving household income position. This finding is consistent with the results reported by Berger and Engzell (2022). In contrast, inflation emerges as one of the main constraints on income mobility, particularly in urban areas, by reducing households' purchasing power and limiting their ability to move to higher income deciles. In rural areas, rising production costs and inflationary pressures are likewise associated with more limited income mobility, consistent with the findings of Fotras and Shahbazi (2015).

Overall, the findings suggest that income mobility in Iran during the study period was concentrated primarily in the middle deciles of the income distribution, whereas households located at the lower and upper ends experienced considerably less mobility. A similar pattern has been documented in several developing countries (Berman, 2022). These findings underscore the importance of policies that, alongside inflation control, promote human capital development, expand access to education, improve information infrastructure, and strengthen economic opportunities for households.

Despite these contributions, several limitations warrant acknowledgment. First, the study covers only a three-year period (2021–2023); therefore, the findings reflect short-term income dynamics and cannot be interpreted as evidence of the long-term persistence of the observed mobility patterns. Second, the data are limited to the observable variables available in the HEIS, and several potentially important determinants of income mobility including social capital, behavioral characteristics, the quality of social networks, and other unobserved factors could not be incorporated into the analysis.

Policy implications

Based on the findings of this study, income mobility among Iranian households over the period 2021–2023 is shaped by a combination of economic, demographic, and welfare-related factors. Accordingly, the following policy implications are proposed to improve opportunities for upward income mobility.

- Improving agricultural productivity and strengthening productive assets: The regression results indicate that asset ownership is positively associated with improvements in income position and a higher probability of upward mobility. Therefore, supporting productive investment, expanding mechanization, land consolidation, and enhancing production efficiency can help improve income opportunities for rural households.
- Developing local economic activities and strengthening value chains: Given the differences in mobility patterns between urban and rural areas, the expansion of agro-processing industries, the

development of local enterprises, and the strengthening of agricultural value chains can increase employment and income opportunities in rural regions and reduce households' dependence on agricultural income.

- Expanding digital infrastructure and internet access: The findings show that internet access is positively associated with both income position and decile mobility. Accordingly, improving communication infrastructure, providing digital skills training, and facilitating households' access to online services and digital markets can create broader economic opportunities.
- Strengthening human capital through education and health investment: The positive effects of education and health expenditures on income mobility highlight the importance of investment in human capital. In this regard, improving access to education and healthcare services for low-income groups is of particular importance.
- Controlling inflation and preserving household purchasing power: The results indicate that inflation, particularly in urban areas, is a key constraint on upward income mobility. Therefore, implementing effective anti-inflation policies and preserving household purchasing power can play an important role in improving economic conditions and enhancing mobility opportunities.

- Directions for future research: Given the limited time horizon of this study (three years), future research is encouraged to use longer panel datasets in order to examine income mobility patterns over extended periods and to better capture long-term dynamics.

Author Contributions

Esmaeil Pishbahar was responsible for the conceptualization, study design, and drafting the original manuscript. Zakieh Davoudnia carried out the data collection and software-based analysis. Mohammad Ghahremanzadeh, Javad Hosseinzad, and Arash Dourandish supervised the entire project and provided administrative and scientific oversight.

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"Not applicable"

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Ethical considerations

The authors avoided data fabrication, falsification, plagiarism, and misconduct.

Conflict of interest

The author declares no conflict of interest.

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اسماعیل پیش‌بهار[1]✉، زکیه داودنیا[2]، محمد قهرمان‌زاده[3]، جواد حسین‌زاد[4]، آرش دوراندیش[5]

۱ - نویسنده مسئول، گروه اقتصاد کشاورزی، دانشکده اقتصاد و توسعه کشاورزی، دانشگاه تهران، کرج، ایران. رایانامه: esmaeil.pishbahar@ut.ac.ir

۲- گروه اقتصاد کشاورزی، دانشکده کشاورزی، دانشگاه تبریز، تبریز، ایران. رایانامه: z.davoudniya@tabrizu.ac.ir

۳- گروه اقتصاد کشاورزی، دانشکده کشاورزی، دانشگاه تبریز، تبریز، ایران. رایانامه: ghahremanzadeh@tabrizu.ac.ir

٤- گروه اقتصاد کشاورزی، دانشکده کشاورزی، دانشگاه تبریز، تبریز، ایران.رایانامه: j.hosseinzad@tabrizu.ac.ir

۵- گروه اقتصاد کشاورزی، دانشکده اقتصاد و توسعه کشاورزی، دانشگاه تهران، کرج، ایران. رایانامه: dourandish@ut.ac.ir

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انتقال بین‌دهکی، پویایی اقتصادی، رفاه خانوار، نوسانات اقتصاد کلان، پانل چرخشی، شاخص شوروکس.

چکیده

تحرّک درآمدی یکی از شاخص‌های کلیدی پویایی اقتصادی است و نقش مهمی در ارزیابی نابرابری و فرصت‌های ارتقای اقتصادی خانوارها دارد. این مطالعه الگوهای تحرّک درآمدی درون‌نسلی خانوارهای شهری و روستایی ایران طی سال‌های ۱۴۰۰ تا ۱۴۰۲ را با استفاده از ماتریس‌های انتقال دهک‌های درآمدی، شاخص شوروکس و مدل‌های رگرسیون پانلی بررسی می‌کند. نتایج نشان می‌دهد بیشترین جابه‌جایی درآمدی در دهک‌های میانی رخ می‌دهد، در حالی که دهک‌های ابتدایی و انتهایی از ثبات نسبی بیشتری برخوردارند؛ به‌گونه‌ای که خانوارهای کم‌درآمد و پردرآمد در مقایسه با دهک‌های میانی، احتمال بیشتری برای باقی ماندن در موقعیت درآمدی پیشین خود دارند. مقایسه مناطق شهری و روستایی حاکی از شباهت الگوی کلی تحرّک همراه با تفاوت در شدت و عوامل مؤثر است؛ به‌طوری‌که دهک‌های پایین شهری نسبت به دهک‌های پایین روستایی تحرّک کمتری داشته و خانوارهای روستایی حساسیت بیشتری نسبت به ویژگی‌های جمعیتی و شرایط اقتصادی نشان می‌دهند. نتایج مدل‌های رگرسیون پانلی نقش معنادار سن سرپرست، اندازه خانوار، مالکیت دارایی‌ها، دسترسی به اینترنت، الگوی مخارج و متغیرهای کلان اقتصادی را در تعیین جایگاه درآمدی و تحرّک دهکی تأیید می‌کند. تورم، به‌ویژه در مناطق شهری، یکی از مهم‌ترین موانع ارتقای درآمدی خانوارها محسوب می‌شود. این یافته‌ها بر ضرورت اتخاذ سیاست‌های هدفمند منطقه‌ای تأکید دارند که از طریق کنترل تورم، تقویت درآمد واقعی خانوارها، بهبود دسترسی به دارایی‌ها و توسعه زیرساخت‌های اطلاعاتی، زمینه افزایش فرصت‌های تحرّک درآمدی را فراهم سازند.

استناد:
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