

Middle class, a multidimensional phenomenon: new research approaches

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A vast internal heterogeneity characterizes the classic category of “middle class”. Under a single label coexist individuals and families with very different income levels, lifestyles and political ideas. Within the “middle class”, salaried and non-salaried workers, people with skills acquired in the formal education system and other self-taught, public and private sector workers are brought together. Professionals, merchants, accountants, office workers, managers and teachers are unified in only one denomination. This empirical diversity may seem a hindrance; but as Raymond Aron^[1] suggested, many current historiographical and ethnographic investigations insist that this should be the starting point. Large-scale regional and even global economic reports use a universal “middle class” notion. Certainly, the sectors usually characterized as “middle class” cannot be isolated

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from capitalist economic processes. However, knowledge of the structural dimensions of global capitalism is not enough to understand the characteristics of social segments defined as “middle class”. Several ethnographic and historiographic studies have shown how necessary it is to understand the middle classes by emphasizing their national specificities^[2]. In the past, many Latin American or Asia studies analyzed their data based on research on the United States or Western Europe, which were considered paradigmatic and universal^[3]. Thus, the peculiar characteristics of the emerging middle class in Nepal at the beginning of the current century can only be understood if these can be placed as part of a conflict between a modernizing cultural project and religious traditions^[4]. In the same way, the growth of the middle class in India cannot be separated from the politics of caste, religion, and gender, which shaped this population^[5]. In Argentina, the idea of the middle class acquired a strong ethnic and racial meaning^[6,7]; precisely, the stories of origin of the middle class have these characteristics^[8].

“Middle class” is often conceived as a reality taken for granted, which is apprehended by the direct correlation between socioeconomic indicators and real groups. But new research approaches are interested in the concrete ways in which middle class is conceived, defined and perceived by specific social groups. A variety of aspects are included: ethnic and racial invocations, conceptions about the nation and collective identity, morality and religion, migratory origins, diverse uses of language and many more. One of the most significant changes in middle class research has been the emphasis on shaping processes. The middle class has been studied as non-teleological, never finished processes. David Parker’s study of the first half of the twentieth century has been fundamental. He analyzed how employees developed a distinctive identity demanding preferential treatment^[9]. In a similar vein, Adamovsky^[6] studied how the Argentine middle class identity emerged as a public discourse as an opposition to Peronism and popular sectors in the mid-twentieth century.

However, these new approaches to research have had little impact on the main disciplines that nurture public administration, such as economics, quantitative sociology, political science or demography. For these disciplines, almost all problems concerning middle class are measurement problems. Consider the following example. According to a 2012 World Bank report, the middle class increased by 50% between 2003-2009, from 103 million people to 152 million. This increase of the middle class reflected the economic growth of the region, a higher per capita income level and an expansion of employment. Who were the middle class? People earning between US \$ 10 and US \$ 50 per day and per capita. In countries like Argentina (which had coped with a very serious crisis in the early twenty-first century), the growth of this segment revealed both the success of economic policies as an extraordinary and rapid recovery. In this case, “middle class” is a category that allows quantitative estimation of the effects of economic policies. If we consider a given period, are people richer or poorer? How many people became wealthy or impoverished? If people improved their income, did the consumption of goods and services increase? In this growth of consumption, what kind of goods and services increased? There is no doubt that this type of information is very relevant; crucial, I would say. This type of organization of socioeconomic information allows the definition of public policies, such as social assistance, health, housing loans, public education or fiscal policy. From the point of view of the functioning of the state, it is a strategic knowledge.

These policies are based on a segmentation of the population in socioeconomic strata: a classification, in the end. These classifications are often made by experts (such as economists and sociologists) and used on behalf of state authority. Like any classification, it has certain arbitrariness. A classificatory category that should include people who are not poor or rich will surely have a significant degree of

arbitrariness. From this perspective, the “middle class” as a category has to solve a double difficulty: on the one hand, its internal diversity, since its roof approaches the upper class while its floor comes close to the lower class; on the other hand, the boundaries with the upper and the lower class. As we know, the “middle class” includes people with very diverse incomes. And some are closer to the “real rich” and others to the “real poor.” The borders can be very diffuse. The specialists are aware of this trouble and, therefore, they discuss the most appropriate criteria for delimiting the segments. This does not seem problematic, unless we confuse these classifications of state experts and officials with the concrete ways in which people classify themselves and others in social life. They do not express the real behaviors, lifestyles, identities, thoughts, ideas or beliefs of people classified as “middle class”. Nevertheless, this does not mean that these classifications do not account for some aspect of reality. Obviously, a certain income level conditions access to certain goods and services. But this relationship is neither mechanical nor automatic. Numerous studies have shown that consumption practices include both decisions based on rational calculations related to available resources and moral or aesthetic aspects. So, the correlation between a population segment and a given type of consumption needs a question: why do people consume certain goods and services? Empirical studies show that acts of consumption are not independent of moral judgments^[10]. If goods and services have different moral qualities (variables according to sectors and contexts), the possession (or not) of these goods and services qualifies their owners^[11]. Similarly, there is no necessary association between the middle class and certain political ideas. People with similar income levels (and even lifestyles) can be expressed in very different political ways. It is the empirical research from a historical and contextual perspective that must study how some political ideas were accepted by certain sectors.

Some scholars assert that the category should be abandoned. If we take into account the inaccuracies discussed above, this may seem reasonable. But things are not so simple, because “middle class” is not just an expert category: it is also and at the same time a social category. The act of classifying is basically human and social. Experts may argue that their taxonomies are better, but they cannot disqualify or ignore everyday classification acts. As I pointed out, we consistently classify people, objects, and places. These classifications are based on cognitive schemes that are socially produced and reproduced, effective to distinguish goods and services, areas of a city to live, walk or consume, clothing, brands, etc. Clearly the access to goods and services is the product of an uneven social structure; but these classification systems organize the experiences regarding levels and lifestyles, possessions or consumptions, while making possible the moral evaluation of such experiences^[12]. The classification is not neutral: it seeks to classify people, goods and places in moral terms, distinguishing the appropriate and inappropriate, the right and wrong, the admissible and inadmissible^[13]. People who define themselves as part of the “middle class” draw boundaries that equate or differentiate them from others. These are hierarchical classifications: some are above and others below. Consider this simple example. When a family seeks a home, it must take into account its objective economic possibilities. These possibilities will allow you to buy, rent or will preclude any real estate transaction. The family can aspire to live in a specific area (because they like it, consider it appropriate, etc.). Consequently, they will live where they can. The area where the family will live has a social image: it is morally qualified. The objective economic possibilities conditions of the family: the area in which their home is located classifies it economically and morally, which confines it to live within certain social and symbolic boundaries^[14,15]. Now, these limits are permanent disputed and redefined. Individuals and families can appeal to different strategic actions to be classified into morally better categories. This activity needs the

approval of other individuals to be successful. Through different modes people seek to be classified and, simultaneously, to classify others: the display of a certain cell phone or clothing of a prestigious brand; the knowledge of certain prestigious places; or the walk in special areas of a city (bars, cafes, restaurants, shops, parks, shopping centers). Of course, as the qualities of the goods are not universal, approval can only succeed to particular audiences. An important consequence of the understanding of this process is that the concepts of social mobility must be reconsidered. In times of crisis, social boundaries become especially labile. But under these circumstances the social groups that perceive themselves as superiors carry out diverse strategies to defend the limits of classification. Individuals and families who experience social decline are able to invest time and money to defend their lifestyles. O'Dougherty^[16] showed how in São Paulo (Brazil) during post-crisis (early 1990s), the middle class appealed to consumption and private education to distinguish themselves from impoverished sectors. For his part, Visacovsky^[17] revealed the tactics carried out various members of the middle class during the first years after the 2001 crisis, such as seeking public schools in areas considered "acceptable".

As we have seen, it is imperative to abandon stereotyped visions of the middle class. The middle class is both a heterogeneous population and a polysemic category, which vary historically and socially. Historical and ethnographic research has shown that the "middle class" is not necessarily associated with certain consumption, lifestyles, values or political ideas. The middle class does not have essential, immutable and universal characteristics. On the contrary, these characteristics are contingent and we must discover them through empirical research. We must think about how social groups become "middle class" in a given context; hence, the new approaches emphasize the study of the processes of conformation of the middle classes as a complex interaction of objective and symbolic forces. Possibly these studies may help to imagine

more careful and targeted public policies, from a less biased perspective, which should be more aware of the complexities and peculiarities of these populations.

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