

## **The new middle class in the global south - a 2-day workshop held at Wiser, Wits University on 21<sup>st</sup> and 22<sup>nd</sup> September 2015.**

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Paradoxically, while in EuroAmerica the old middle class is declining, in the global south its newer incarnation is on the rise. Ever since 1994, the South African press and media has demonstrated an ambivalent attitude towards this newly-emerging group. Is it the bedrock of political stability in our new democracy, or is it simply engaged in frivolous conspicuous consumption and bling? These questions were at the heart of a two-day workshop held at Wiser last week. The organisers tried to help illuminate these questions by introducing some comparative material, from other southern countries where the middle class has recently grown with equivalent speed: especially India and Brazil.

The papers disagreed on whether it is more useful to classify the new middle class using “objective grounds” –whether, as discussed by Roger Southall in a chapter from his forthcoming book, these be people’s roles in the world of work and production or households’ capacity to consume (as with the much-used Living Standards Measures or LSMs)--or whether we should take seriously the “subjective” views of people themselves. According to one paper discussed, by Phadi and Ceruti, a large number of Sowetans regard themselves as “middling people”, positioned somewhere between the top and the bottom, even though their material circumstances, values, and lifestyles differ very widely. In discussion, Ivor Chipkin pointed out that self-identifying as being in the middle is one way to claim membership in a new society, in which “being poor” can be stigmatising. Case studies from India and elsewhere have shown that everyone now considers themselves middle-class. But others have pointed out that to tell a good news story by including those earning \$1 to \$2 a day, as the World Bank does, can be misleading. Are these new categorisations motivated purely by the profits that arise from new forms of financial inclusion – and from targeting a new group of consumers who will buy “more bling”? The paper by Ivor Chipkin suggested that people’s own view of what they are trying to achieve – he called it “middle-classing” – is very important. But what was stressed as crucial by the inhabitants of townhouse complexes in both Roodepoort and Polokwane was neither the jobs they held in the here-and-now nor the things they could buy with the money earned from those jobs. Rather, they were concerned with becoming educated, getting qualifications, and getting ahead: jobs and “buying stuff” might follow, but this could not simply be assumed. (The preoccupation with education, we discovered from reading literature on other regions, is everywhere central in self-definitions of the middle class.) Chipkin suggested that although this preoccupation with educational self-improvement might seem classically “individualised”, it is in its own way intensely political, given how such opportunities were previously denied. The topic of middle class politics was shown to be complicated in other ways too: Mayfair, once a suburb where bourgeois and property-owning Indian families held sway, is now a site of great mixing between income levels and ethnic groups. This has unexpected outcomes for electoral politics, as Khadija Patel showed in her presentation.

In South Africa, as in Brazil and India, the rapid growth of this class owes much to the extension of consumer credit to those formerly denied it, enabling new forms of consumption

(but also leading to precarious outcomes as people struggle to repay, as Deborah James showed in her paper.) As Jason Musyoka pointed out, adopting too broad-ranging and “subjective” definition of the middle class can run the risk of misrepresenting the actual, material circumstances. He, along with many other participants, drew attention to the importance of considering how the links that tie people to their relatives might force us to rethink our categories. In contrast to our classic assumptions about the middle class and its tendency to consume, many of the people he studied were unable to spend the kind of money they would have liked to, since so much of their income was spent on supporting family members: they are “distributors rather than consumers”.

Something the media seldom considers is how the so-called “new middle class” is linked to its older counterpart in South Africa. A paper by Nkululeko Mabandla gave a fascinating account of the way in which, in Umtata in the former Transkei, a group of propertied people--of the type that formed the backbone of the classic “old” “respectable” African middle class--skilfully adapted itself over three generations, turning from farming, through trading, to landlordism, all the while improving the educational qualifications of each successive generation. In this case, the “new” was clearly linked to the “old” via direct links of descent, land ownership, and the development of confidence and social capital over a single family’s lifetime. The question was further illuminated by Max Bolt, who has researched the use of wills to organise the inheritance of property, both landed and otherwise. While certain groups made a habit of this from early in the 20<sup>th</sup> century, many others are now jumping on the bandwagon. But stipulating inheritance in so definite a fashion can have major consequences, creating family conflict and perhaps enabling some to remain middle class while other, non-inheriting family members might undergo “class decline”.

Even if we go with the “middle class as conspicuous consumer” idea, we should look behind the façade to see the complexity beneath. Mehita Iqani explored three films on the “new black middle class”, showing how all (in different ways) highlighted leisure, shopping, and restaurant dining. Why, she asked, do these activities merit such special attention if they are just part of what, for other people, are considered to be ordinary life? Simon Wood’s film *Forerunners* – one of those she referred to – was shown, to great acclaim. It depicted four successful upwardly mobile black people who play golf, drive good cars, and go to restaurants: but who also attend to – and are sometimes torn apart by --- their sense of obligation to their families and ancestors. Showing a similar kind of ambivalence and tension, Simphiwe Ngwane spoke about interviewees who aimed at self-actualisation, often using self-help books in order to do so. But they were in the grip of contradictory and tense emotions: they felt the risk involved in “going it alone” and anxiety--even guilt--about their obligations to relatives. “Performing strategic guilt”, they were careful not to boast lest this make them responsible for even more family support than they felt able to give. Again focussing on consumption, in her paper ‘Khanyi Mbau: Some Notes on How the Media Shouldn’t Address “Rich” Black People’ Hlonipha Mokoena made a subtle argument, showing that some celebrities, in the face of critical interrogation from the media, are assertively engaging in pleasure politics. By constantly changing her face and body, Mbau is indulging in an activity which is both leisure-oriented *and* political. In the face of the kind of dismissive media coverage already mentioned, she becomes both the object of desire, and her own admirer. Danai Mupotsa offered fascinating insights, similarly focused on how bodies are reconfigured and presented, and with a particular focus on women’s aspirations and identities, based on her studies of wedding photographs.

Work, education, family values, and marking oneself off from others both higher and lower than oneself: these themes are common in other studies of middle classes in the global South.

Bringing the whole workshop full circle and reconnecting it to Brazil, George St Clair gave us a foretaste of what might happen some way down the line. The church members he studied in Sao Paulo had played by the rules—being upwardly mobile and aspirational, educating their children, espousing respectable domesticity—but had not enjoyed the fruits of this. In part they blamed a corrupt government, but they also blamed their “typical Brazilian” tendency to seek favours from others, bend laws, skirt institutional norms. (Sound familiar?) They had largely withdrawn from the public-facing role that theorists assume middle classes ought to play; for them the feeling of being middle class included disappointment and disillusion. Perhaps, the workshop concluded, it is easier to struggle at being middle class than to arrive.

Overall, we took a lesson from a working paper by Carola Lentz, entitled “Elites or middle classes? Lessons from transnational research for the study of social stratification in Africa”. The sense of being middle class, she concludes, *is* subjective and involves people’s sense of identity. But this needs to be combined with a “class analysis” centred on objective criteria: education, occupation, income and property.

Deborah James