MIDDLE CLASSES LIFESTYLE IN POSTMODERN SOCIETY:
TAIWAN, CHINA, JAPAN AND BULGARIA IN COMPARATIVE PERSPECTIVE

Maya KELIYAN

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Summary of the book

In this study she focuses on comparative sociological research on Taiwanese, Chinese, Japanese and Bulgarian trends of post-modernization, globalization, glocalization and internationalization, through changes in their middle classes formation, recruitment, composition, socio-structural boundaries, consumption patterns, leisure, and lifestyle. What is the value of such an approach? On the one hand, she is following her belief that when sociological study is conducted using a comparative method, fresh insights into studying societies be uncovered and new discoveries revealed. On the other hand, this research is important for fuller comprehension of contemporary society and culture in general. Middle classes lifestyles in Taiwan, China, Japan, and Bulgaria in recent years have been characterized by growing diversification, globalization, internationalization, digitalization, the increasing influence of youth cultures and subcultures, the rising lifestyle power of women (not only as housewives, but also the influence of single new middle class representatives). The aging population and deepening socio-economic inequalities are becoming topics of intense discussion in four studied countries. Bulgarian and Chinese middle classes lifestyles are now moving through stages that Japan and Taiwan have long since passed, including “Westernization,” “MacDonaldization,” consumerism, malling, Americanization, and so on. What kind of conclusions and lessons, both in positive and in negative aspects could be drown from studied societies social development, achievements and problems? This work is not a purely academic effort: the practical-applied aspect of the text is to learn from each of researched societies positive and negative experience concerning middle classes patterns of development and lifestyle changes.

Key words: Taiwan, China, Japan, Bulgaria, middle classes, lifestyle, consumption patterns, post-modernization.

Cover image: Taiwanese aboriginal cultural performance group
Photo by the author
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INTRODUCTION

1. Four countries in focus: Taiwan\(^1\), China, Japan and Bulgaria

According to well-known and widespread socio-economic and geopolitical stereotypes, Taiwan is one of four Asian tigers, Japan is among world economic powers and advanced economies, China is the most quickly developing BRICS country and Bulgaria is small East-European nation, the EU member state often criticized for its failure to overcome corruption and an inefficient judicial system. This research aims to go beyond familiar labels; its ambition is to ask questions, to look for similarities and differences, to elaborate explanations beyond obviousness and ordinary visibility.

Statistical data, quoted in Table 1 show that among four nations China is the largest, most populated one, with the highest nominal GDP, but with the lowest GDP per capita. Bulgaria has both the smallest population and the smallest nominal GDP, which is an illustration of its weak economic performance. Japan and Taiwan (which is the smallest between four countries by its area of 36,000 square km) meet all necessary economic criteria to be defined as developed countries with advanced economies. Japan ranks 3\(^{rd}\) among 148 countries by its life expectancy of 82.6 years, followed by Taiwan at 31\(^{st}\) position with life expectancy of 79.2 years, Bulgaria at 64\(^{th}\) position with life expectancy of 74.2 years and China ranks 75\(^{th}\) with life expectancy of 73.5 years (Table 1).

According to the data presented by The World Economic Forum’s The Global Competitiveness\(^2\) Report 2013-2014, based on economic development criteria Japan ranks 9th, Taiwan 12th, China 29th and Bulgaria – 57\(^{th}\) among studied 148 nations. During 2013 Taiwan and Japan continue to enjoy a major competitive edge in innovation - Japan ranks 5 with its score of 5.5 and Taiwan ranks 8 with score of 5.2 (Table 2) and in health and primary education (Japan

\(^{1}\) I respectfully acknowledge the generous support of The Taiwan Fellowship awarded by Ministry of Foreign Affair of Republic of China making possible one year research stay in Taiwan during 2014. I highly appreciate warm hospitality and excellent working conditions offered by host institution - Department of Sociology and International Program of Asia Pacific Studies at National Chengchi University as well as a kind support and cooperation of my host Professor, Dr. Ping-Yin Kuan.

\(^{2}\) Competitiveness is defined as “the set of institutions, policies, and factors that determine the level of productivity of a country. The level of productivity, in turn, sets the level of prosperity that can be reached by an economy” (Schwab 2013, 4, \textit{http://www3.weforum.org/docs/WEF_GlobalCompetitivenessReport_2013-14.pdf}).
holds 10th position Taiwan holds 11th position). Taiwan has world-class tertiary education enrollment rate (7th position) and higher education and training (11th).

Table 1:
Basic statistical information 2013

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Taiwan</th>
<th>China</th>
<th>Japan</th>
<th>Bulgaria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area (sq. km)</td>
<td>36 000</td>
<td>9 597 000</td>
<td>378 000</td>
<td>111 000</td>
</tr>
<tr>
<td>Population (millions)</td>
<td>23,2</td>
<td>1 344</td>
<td>127,8</td>
<td>7,3</td>
</tr>
<tr>
<td>GDP (US$ billions)</td>
<td>474</td>
<td>8 227</td>
<td>5 964</td>
<td>51</td>
</tr>
<tr>
<td>GDP per capita (US$)</td>
<td>20 328</td>
<td>6 076</td>
<td>46 736</td>
<td>7 033</td>
</tr>
<tr>
<td>Life expectancy (years)</td>
<td>79,2</td>
<td>73,5</td>
<td>82,6</td>
<td>74,2</td>
</tr>
</tbody>
</table>

Among four countries Taiwan ranks highest by its quality of educational system (30th position), far ahead of Japan (50th), and China (54th). Bulgaria has the lowest level of quality of educational system among four countries (90th), innovation (105th), health and primary education (45th) which describes some of the reasons of its weak competitiveness. It is the poorest EU member state, with lowest income level and weak economic performance.

China’s position is lowest when it comes to secondary education enrollment (90th), higher education and training (70th), and tertiary education enrollment (83rd). China and Bulgaria, on one hand, and Taiwan and Japan, on the other hand, share common patterns of women participation in labor force as ratio to men; China’s position is 36th and Bulgaria’s – 39th, and Taiwan’s rank is 87th, and Japan’s – 90th (Table 2).

---

Taiwan’s and Japan’s position, competitiveness and socio-economic performance have been very stable and consistently strong over the recent years. China’s macroeconomic situation remains generally favorable, but the country needs to improve the low tertiary education enrollment the average quality of teaching, and an apparent disconnect between educational content and business needs, as well as its innovation capacity.

Table 2:  
Global competitiveness indicators 2013

<table>
<thead>
<tr>
<th>Indicators (rank out of 148 countries)</th>
<th>Taiwan</th>
<th>China</th>
<th>Japan</th>
<th>Bulgaria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and primary education</td>
<td>11</td>
<td>40</td>
<td>10</td>
<td>45</td>
</tr>
<tr>
<td>Higher education and training</td>
<td>11</td>
<td>70</td>
<td>21</td>
<td>69</td>
</tr>
<tr>
<td>Innovation</td>
<td>8</td>
<td>32</td>
<td>5</td>
<td>105</td>
</tr>
<tr>
<td>Secondary education enrollment</td>
<td>40</td>
<td>90</td>
<td>27</td>
<td>74</td>
</tr>
<tr>
<td>Tertiary education enrollment</td>
<td>7</td>
<td>83</td>
<td>37</td>
<td>44</td>
</tr>
<tr>
<td>Quality of educational system</td>
<td>30</td>
<td>54</td>
<td>50</td>
<td>90</td>
</tr>
<tr>
<td>Women in labor force</td>
<td>87</td>
<td>36</td>
<td>90</td>
<td>39</td>
</tr>
</tbody>
</table>
2. Comparison between Taiwan, China, Japan and Bulgaria

According to the author’s understanding, in order to be topical and fruitful, the debate as to the nature of contemporary societies, as to their particularities, mutual similarities and differences, and the crises they undergo, requires a comprehensive analysis of the processes occurring in the middle classes lifestyle of these societies.

Middle classes and their lifestyle do not exist simply in general, in themselves: apart from theoretical constructs, abstractions, and generalizations, they are always linked to concrete societies; they exist at a specific stage of development, and they are tied to specific social-stratification structures and formations. The aim of this work is definitely not to limit itself to outlining the geographical particularities and the network of cultural differences in middle classes lifestyle, but to compare these in order to reach a fuller understanding of the concept under study.

The choice of topic made here is not coincidental; it has been influenced by the following considerations:

The first (but not most important) is personal: I have had many years (more than 22) of research experience with Japanese society and about 10 years with Chinese society; the internal logic of my study brought about the necessity to include Taiwan in this comparative sociological research.

Second, the choice of comparison between middle classes lifestyle in Taiwan, China, Japan and Bulgaria is not coincidental; despite the obvious differences of civilization, culture, economy and geography between three East Asian countries and East European Bulgaria, there are also more than a few important common points between them. More precisely:

- In their development one observes certain features common to “late” and “state-conducted” modernizations: state policy and state priorities prove a particularly important factor of the direction of social development, of the achievement of preset goals, and of the final result of changes.
- Similar are some trends in social structuring and the development of middle strata after the World War Two, for example patterns of reproduction of new middles in Japan, Taiwan and Bulgaria, the decline in relative share of old middles in Japan, Taiwan and Bulgaria, etc. After World War Two, in Taiwan, Bulgaria and Japan alike, small-scale
farmers made up the major part of the population. During the three country’s post-war modernization and industrialization, the agricultural sector was the main yielder of material and human resources for the development of the industrial branches. The proportion of the working class and of the new middle strata grew at the expense of the decreasing share of people occupied in the agrarian sector. The analysis of the middle strata in Taiwan, Japan and Bulgaria shows that in three cases state policy has had a decisive impact on their status characteristics and the recruitment patterns of these strata. The chosen aims and directions of post-war modernization have also defined the development trends of the working class on one hand, and of the place of the new middle strata on the other, in the changing system of social stratification.

- In Taiwan, China and Japan there are special local meaning of the term of the middle class. In Taiwan it could be “middle propertied class”, “middle propertied strata”, “intermediate class”, “intermediate strata”, “the solid middle” (Hsiao 1993, 9). In Japanese we can recognize “middle economic class”, “middle prestigious class”, and “middle strata” (Odaka 1966, 543; Kosaka 1994, 95-97). “Middle economic class” is used to denominate the middle class which some conceptions define as “bourgeoisie”, or as a middle class defined on the basis of owned means of production and economic power. “Middle strata” is used as a concept characterizing the middle class as regards their intermediate position in the stratification space. After the 1970s, the sociological concept, equivalent to the understanding of a middle class in western sociology, is “middle prestigious class”, or in Japanese chuuryuu kaikyuu, situated between the upper and lower classes (Kosaka 1994, 103-104).

- Egalitarian values and attitudes are important and strongly influential in all investigated four societies.

- In separate periods of their development, these societies have followed the leading Western models and they have understood their respective modernizations as Westernization.

- Japan, Taiwan and China during some periods of their history have been regarded as examples for successful reforms – Japan as first successful modernized non-Western country and Taiwan as first Chinese democracy; during recent years China is an example for fast economic growth. During the end of 1950s Japan emerged as second world
economic power in terms of its nominal GNP and its rapid and high economic development till early 1990s was described as “economic miracle”. From the 1960s to the early 1990s Taiwan emerged as one of East Asian quickly industrialized “Little Tigers” and its stunning economic growth was also seen as “miraculous” (Tsang 2012).

- After the World War Two, both China and Bulgaria developed as communist countries under the dictatorship of their respective communist parties. In 1949 in Taiwan was enforced the martial law. In 1978 China declared a course of market-oriented changes, and opened its economy; the martial law was repealed in Taiwan in 1987 and country developed democratic institutions. In 1989 Bulgaria commenced a transition to a democratic and market society, and after joining NATO in March 2004, since January 1, 2007 has become an European Union member state.

- During 1970s Taiwan political leaders following successful Japanese model two decades ago realized that, for assured future prosperity, a transformation from production of cheap consumer goods for export to competitive and qualititative high-tech electronics is needed. As a result a number of high-tech industrial parks have been opened. In its turn mainland China has used the same model after middle 1990s to strengthen its economy. Japan is well known producer of global brand names in high-tech electronics and decades after its success Taiwan, and during recent years mainland China encouraged their local enterprises to switch from other firms original equipment to establishing their own brands. Three countries are among world largest holders of foreign exchange reserves and high saving rates. At the end of 2013, Japan ranked as the world's largest net creditor with a net asset position\(^4\) of US$3.11 trillion, ahead of China’s US$1.97 trillion in net asset position, and Taiwan holds fifth place with international investment recorded a net asset position of US$44.9 billion.

- Middle classes lifestyles in Taiwan, China, Japan and Bulgaria in recent years are characterized by growing diversification, globalization, internationalization, digitalization, increasing influence of youth cultures and subcultures, rising lifestyle power of women (not only as housewives, but also the influence of single new middle class representatives), the population aging, and the deepening socio-economic

\(^4\) The net asset position is calculated by subtracting a country's total external liabilities from its total external assets. A creditor nation has positive net investment after recording all of the financial transactions completed between it and the rest of the world; it is a nation with a cumulative balance of payment surplus.
inequalities is becoming a topic of intense discussion. Bulgarian and Chinese middle
classes lifestyles are now moving through stages that Japan and Taiwan has long since
passed, such as “Westernization”, “MacDonaldization”, consumerism, malling,
Americanization, etc.

Thirdly, there are similarities between Taiwan, China, Japan and (to a lesser extent)
Bulgaria, in the extensive role which the family plays in providing social welfare and social
solidarity\(^5\). In all studied countries smaller proportions of old people live on their own and it is
still alive the tradition to live with other family members. However in recent years there are
evident changes in household composition and consistent nuclearization of family.

Fourthly, in the global world of today, there are growing trends of convergence, of basic
similarity between corresponding social structures in societies that are otherwise at different
stages of development. Of course, the significant differences between these societies remain, but
there is a general similarity in the mechanisms of social structuring and in certain characteristics
of the social status of corresponding social categories, groups, and strata.

The fifth reason for undertaking the comparative research of these four societies is the
role of middle classes and their lifestyle in the contemporary world. Their study serves as a basis
for conclusions as to the similarities and differences in social structuring in Taiwan, China, Japan
and Bulgaria.

What is the value of such an approach? I am following the conviction that when
sociological research is conducted by a \textit{comparative method}, on the one side, new aspects of
studied objects (in our case Taiwan, China, Japan and Bulgaria) can be discovered. On the other
side, this research is important for fuller comprehension of contemporary society and culture in
general.

What are the characteristics of the social structures, and what are the mechanisms of
social structuring that underlie the very different results of Taiwanese, Chinese, Japanese and
Bulgarian social development? The answers will be sought in the framework of the indicated
parameters and within the set limits of this study: in reference to the social-stratification structure
of the four societies, the place of the middle strata in them and the role of their lifestyle in the
processes of their respective post-modernization. These answers will define the practical purpose
and meaning of this work.

\(^5\) See Goodman and Stockwin, Preface in Shirahase 2014, xvi, about the case of Taiwan and Japan.
The analysis of the middle classes lifestyle in comparative perspective in Taiwan, China, Japan and Bulgaria goes beyond the field of regional studies. It is not limited only to conclusions on their similarities and differences, but, on the basis of these conclusions, attains a more comprehensive understanding of the very concept of middle classes lifestyle, of its characteristics and manifestations in various contemporary societies. The study of lifestyle allows making conclusions about the common and the specific in the development and social structuring of Taiwanese, Chinese, Japanese and Bulgarian societies, and about contemporary societies in general. Similarities and differences are traits of trends toward growing similarity or difference, toward convergence or divergence, not only in middle classes lifestyle but also between separate societies and their social-structure formations.

The comparative study of post-communist East European Bulgarian society, post-reform China, and of postmodern Japan and Taiwan makes it possible for sociological knowledge to go beyond the Western, more specifically the European, context. This approach contributes to deepening out understanding of the nature of various contemporary Eastern societies and their experience in post-modernization, democratization, transition to a market society, globalization, etc. In this sense, the text proposes answers to questions such as: what is the nature of East Asian post-modernization and what are the social-structural particularities of East Asian post-modernity, in this case in Taiwan and Japan? Can we rightfully refer to “postmodern” processes and trends in a post-communist society such as the Bulgarian one and in post-reform China? Is the use of the term nonsensical here or is this a reality? What are the social-structural particularities of contemporary Eastern societies, both developed and developing ones? Of course, the text does not oppose East and West – this would be unjustified and not sensible, especially in today’s global world. The realities in these two parts of the world are rather different types, variants, of postmodern development, different kinds of social experience, and understanding them would lead to a fuller understanding of all contemporary societies in their concrete features and variety.

The study of middle classes lifestyle in Taiwan, China, Japan, and Bulgaria from comparative international perspective helps to describe broader Eastern perspective of the studied social phenomenon and to provide a comprehensive framework for conceptualizing undergoing contemporary global social-structural changes. Through her research author would like to contribute from East European (and more precisely Bulgarian) intellectual traditions to
better understanding of **place and role of studied Eastern** (East Asian and East European) **type of societies in contemporary global world.** The study makes it possible for sociological knowledge to go **beyond the Western, more specifically the European, context.**

**3. Research purpose, hypotheses and methodology**

The **goal** of the project is by studying middle classes lifestyle, to establish the general and specific characteristics and trends of Taiwanese, Chinese, Japanese and Bulgarian society, the place and role of their middle classes in current socio-economic and cultural changes. The project **purpose** is to study the **particularities of the middle classes lifestyle** in these four countries through exploring different social group’s activities, the **factors** that enable and stimulate lifestyle diversification, and the **impact** all these processes have on four societies’ social structures and development.

From formulated goal and purpose of the project, the following **tasks** follow:

1. To identify main trends of Taiwanese, Chinese, Japanese and Bulgarian middle classes patterns of development in the middle of first decade of 21st century and to arrive to conclusions about their general similarities and differences.

2. To characterize middle classes lifestyle particularities in four countries as compared with those of other social-structural formations.

3. To distinguish differences between lifestyles of various social groups, belonging to the middle classes (old and new middle; upper-middle, middle-middle, low-middle; entrepreneurs, professionals, administrators, managers, etc.) and to arrive to generalizations about middle classes lifestyle diversification.

4. To trace the importance of the middle classes lifestyle for objective and subjective social status identification in investigated countries.

**The hypotheses** of this project are the following:

1. It is assumed that in China and Bulgaria, which middle classes are not as developed and stable compared to these formations in Taiwan and Japan, lifestyle plays, in principle, the same structure-determining role as in developed postmodern societies in general.
2. It is assumed that the middle classes in China and Bulgaria, although much weaker in their social-economic, cultural, power, etc., resources than the Taiwanese and Japanese middle strata, have a fundamentally similar role and importance for defining the overall character of the lifestyle of their respective societies.

The methodological basis of the study lies within the research field of social stratification (classical names as Weber and Veblen), on the work of Bourdieu, Featherstone, Jameson, Chaney, McCracken, etc. The author bases her discussion on middle classes on the neo-Weberian tradition in the field of theories of classes and of social stratification, elaborated by British sociologists (Goldthorpe, Savage, Barlow, Dickens Fielding, Butler, Gouldner, Crompton, Hickox, etc.).

What are the characteristics of the social structures, and what are the mechanisms of social structuring that underlie the very different results in Taiwan, China, Japan and Bulgaria? The answers will be sought in the framework of the indicated parameters and within the set limits of this study: in reference to the social-stratification structure of the four societies, and the place of the middle strata in them.

What kind of conclusions and lessons, both in positive and in negative aspects could be drawn from studied societies social development, achievements and problems? This work is not a purely academic effort: the practical-applied aspect of the text is to learn from each of researched societies positive and negative experience concerning middle classes patterns of development and lifestyle changes.

These answers will define the practical purpose and meaning of this work.

4. The middle strata lifestyle dynamism and diversification in postmodern society

4.1. The middle strata as social-group

I am following the neo-Weberian tradition in the theories of classes and social stratification, and more precisely the conceptual framework for defining middle class by objective criteria, elaborated by John Goldthorpe (1982). The notion of “middle class” is incompatible with Karl Marx’s class dichotomy, but is close to Max Weber’s understanding of
“status groups”. It is defined on the basis of an aggregate of criteria, including not only ownership of the means of production, income and assets, but also the type of employment, the work situation, profession, occupation, education, prestige, power resources, cultural status, lifestyle, consumption patterns, values system, political views and behavior, etc. The middle class holds an intermediate place in the stratification ladder, in the so-called stratification middle. Due to the heterogeneous nature of this class, it would be more appropriate to speak, not of a single middle class, but of middle classes in the plural, or more precisely of middle strata. The middle strata are an explanatory mechanism for the processes and changes in contemporary societies.

In studying the middle strata, it is important to have in mind the following (Tilkidjieva 2002, 137-261):

1. The social-economic situation of a group, although it is of foremost importance in determining the stratification boundaries of the middle strata, is not a sufficient or unique criterion for distinguishing these strata. Social-economic status, for its part, is not reducible only to financial status, to the incomes and assets, but depends on the work situation and type of employment and occupation, on profession, market situation, job position, and institutional power resources.

2. The middle strata have an achieved social-economic status, based on education and qualification, on organizational skills, property; they rely mainly on their own labor and enjoy autonomy in their labor activity, carried out legally.

3. Three basic middle strata can be distinguished:
   - Those including the private entrepreneurs in small and middle business, who mostly use their economic resources, such as real estate, financial means and property;
   - Administrators, who rely mainly on their organizational resource;
   - Professionals, known in some former communist countries as the “intelligentsia”, who have their cultural resource consisting in education, knowledge and qualification;

4. The middle strata are enterprising social actors; they share post-materialistic values\(^6\) and have a corresponding lifestyle and consumption patterns.

\(^6\) In a sense Roland Inglehart 1977 used the term.
4. 2. Lifestyle

Lifestyle is closely connected with identity and it characterizes a person’s class, status group or subculture (Zablocki and Kanter 1976, 271). Groups and community identities are formed through lifestyle-related practices (Crompton 1992, 128). Lifestyle is a significant indicator of the ways in which social ties are formed and in which solidarity appears in the group and community (Longhurst and Savage 1996, 228, 295). This important function is one of the reasons why “lifestyle” is so widely used and is also an important theoretical instrument for the study of social-group status in modern theories of social stratification.

In postmodern society, according to Mike Featherstone, “the new heroes of consumer culture turn lifestyle into a life project and express their individuality and understanding of style by the specific set of commodities, clothing, practices, experience, outward appearance that they create as their own lifestyle” (Featherstone 1991, 86). The greater economic freedom and higher living standard people enjoy in this type of society, all other things being equal, create greater opportunities for free choice and activeness in lifestyle for different social groups and strata.

According to my own view, some of the phenomena pertaining to lifestyle are: the complete set of typical and distinctive particularities and characteristics of activities other than paid labor, activities that can be freely chosen or done out of necessity but in ways specific to the individual or group, as well as all the subjective assessments, attitudes and feelings of satisfaction related to those activities (Keliyan 2010, 24-26). Lifestyle, although at first glance a product of individual choice, goes beyond individual distinctiveness; through it individuals can express themselves and their preferences, but it remains, nevertheless, something pertaining to the social-group and is a form of collective identity (Chaney 1996, 11, 31). Lifestyle creates social bonds between people and significantly delimits, distinguishes social-formations from one another (Featherstone 1991, 13).

On the basis of the above analysis and the adopted stratification approach, I define the concept under study in the following way:

Lifestyle is defined as a synthesis, a unity stabilized through the social-group, a unity of specific, typical and distinguishable consumption patterns, leisure patterns of individuals, of various distinctive activities, apart from paid labor, as well as the evaluations, attitudes and satisfaction related to them. Lifestyle is structure-defining for social subjects and is among the
key indicators of social-group status in postmodern society. Lifestyle began to play this important role in the 1970s, when developed societies entered into a postmodern stage. Since then the middle classes have affirmed themselves as a social group whose lifestyles play an innovative and stabilizing role in contemporary societies. Lifestyle creates social bonds between people and significantly delimits, distinguishes social-formations from one another. Middle classes lifestyle is an integral unity of specific, typical and distinctive activities carried out by different social groups belonging to the various middle classes formations (old middle and new middle; upper-middle, middle-middle and low-middle; entrepreneurs, professionals, managers, administrators, experts, specialists, etc.), activities carried out apart from paid labor (i.e. on a voluntary basis); some of these activities may be freely chosen (preferred), others may be pursued out of necessity (i.e. obligatory); it includes the evaluations, attitudes and satisfaction derived from all these activities. Lifestyle also plays a structure-determining role with respect to the different social-group formations among middle classes, as well as between middle classes and other social classes: ever since the emergence of postmodern society, not only individuals but the organizations and communities formed by individuals have enjoyed much greater freedom and have a growing possibility to choose their lifestyle; in turn, that lifestyle defines their position in the social structure of society.

4.3. The middle strata lifestyle post-modernization

Lifestyle practices affirm and reproduce social hierarchies, and this function of theirs appears with various degrees of force in different social groups and strata and in different types of society. “Maintenance of consumer practices”, which are important part of lifestyle, largely depends on one’s place in the social structure and “on economic and class position” (Crompton 1996, p. 118). After societies have achieved a certain level of material-economic development during mid-1950s, a new historical epoch begins with the transition from modern to postmodern society. Predominant in the latter are different kinds of correlations, and consumption and lifestyle attain an important new role for “economic freedom”, for development, and for the way of thinking of society. This “marks the end of traditional social structures and divisions, based foremost on production” and clearly demonstrates the
importance of consumption and of lifestyle in distinguishing them (Featherstone 1991, 83). The ever expanding middle strata are most actively included in the creation of a postmodern lifestyle, in the “production and dissemination of its values” (Featherstone 1987, 56). These processes are related, on one hand, to the large size and stability of the middle strata in the stratification structure of postmodern society, and on the other to their own social group characteristics.

Among the various patterns of consumer behavior and lifestyle of the middle strata, two basic types may be distinguished (Savage et. al. 1992, 99). One type of consumers are defined as traditionalists and conformists; the other, as radical innovators, adherents of new, vanguard consumption patterns. Until the late 1960s, or until the features of the emerging postmodern society became distinct, the middle strata were perceived primarily as conformists, for most of them followed conservative consumption patterns (Mills 1951, Whyte 1957). But in the 1970s and 80s, a radical change came about in their consumer culture and lifestyle. At that time their relative share in the population grew appreciably and the new middle strata came to the fore, as expressers of “progressive social and cultural views” (Gouldner 1979). Their growing numbers and importance are related to the particularities and requirements of postmodern society, which increasingly needs, and invests in, developed sectors of services, science, education, information technologies, media communications, etc. The new middles have been defined as the social carrier of post-materialistic values (Inglehart 1977, 1997), and are considered to be the social basis of postmodern culture (Lash and Urry 1987). These social-professional groups have the needed social-group resource that allows them to utilize the available opportunities for individual self-expression and initiative, and to choose in matters of consumption and lifestyle. This makes the new middle the “new trendsetters in matters of taste”; they are people who invest in consumption and in the “art of living” (Bourdieu 1984, 310, 366). Some of them even “take their lifestyle more seriously than they do their professional career” (Binkley 2004, 72) and strive to “educate themselves in the art of lifestyle” (Skeggs 2004, 136). The work positions that they occupy permit them to have “some cultural authority as creators of taste and disseminators of new consumer values” (Nixon and Du Gay, 2002). On the basis of all this, Pierre Bourdieu defines the members of the “new bourgeoisie” and “new petty bourgeoisie” (as they are delimited according to this class scheme) as “cultural mediators”, who ensure symbolic commodities and services. In striving to legitimate themselves as “new intellectuals”, they “invest in the art of living” (ibid. 359-371). They identify with the “intellectual lifestyle” and
play the role of a transmission and intermediaries between “intellectual ideas” and the broader public. All this makes them “consumers by nature” and the chief characters in the “process of creating the perfect consumer” (Featherstone 1987, 64-65). They are “cultural entrepreneurs” who try to legitimize the intellectualization of practices located far from “high taste” and belonging to mass culture.

The postmodern lifestyle is defined in literature as directly linked to the middle strata; various authors differ only as regards the relative importance they attach to specific groups within the middle strata (Savage et al. 1992). According to Scott Lash and John Urry (1987) the “top-rank white collars” belonging to the “service class” play a leading role for creating postmodern forms of culture. In striving to clarify the nature of these groups, some authors have pointed out the importance of highly-educated employees in large corporations (Pfeil 1988). Others believe the leading groups are the professionals in advertising, because they “produce symbols” (Lash 1990).

In the 1990s a distinction was reached between three clearly different types of lifestyle among the middle strata. These were: the ascetic, typical for professionals from the budget sector; the postmodern, current among professionals and specialists from the private sector, and the ordinary, also designated as the inconspicuous or even dull lifestyle, typical for managers and state officials (Savage et al. 1992). In the front ranks of this lifestyle were the young professionals from the private sector, who are prepared to easily part with the consumption patterns inherited from their ancestors and turn to new patterns. Given that contemporary postmodern lifestyle involves a “valuation and transformation of a commodity into cultural patterns”, these groups of the middle strata have the greatest chances of taking part in this process. The postmodern, which is overall associated with the commercialization of culture and the massification of “high culture”, moves on a different track from the strivings of highly-cultivated intellectuals who cannot be the leaders of such a lifestyle but can only comment on it (Savage et al. 1992).

In the social structure of postmodern society, the “service class” has a special place (Goldthorpe et al. 1987). Although understood in different ways by different authors (Goldthorpe 1982, Lash and Urry 1987), depending on their class schemas, its place and importance in contemporary consumption patterns and lifestyle is undisputed. Certain social groups in the quickly developing “service class” use the postmodern tastes and lifestyle they have assimilated
in order to ascribe to themselves the highly desired “intellectual” public image (Lash and Urry 1994). Playing the role of postmodern consumers, they are an “avant-garde” of the “disorganization of capitalism” (Lash and Urry 1987). According to Rosemary Crompton (1992) the growing proportion of such people and their increasing heterogeneity as a group, lead to great differences in their class consciousness and in their consumption patterns and lifestyles. These differences could play both an “organizing” (according to John Goldthorpe) and “disorganizing” (according to Scott Lash and John Urry) role in postmodern society.

Since the 1990s the opposite tendencies have been observed in the lifestyle of the middle strata. A number of authors maintain that increasingly important in the self-identification of class position is not the distinctiveness of the consumption patterns and lifestyle of a person but rather the non-distinctive difference between strata in this respect (Warde 1997, 2002, Miller 1995, Savage et al. 1992, Bell and Hollows 2005, 2006, and others). These authors assume that consumption and lifestyle are not based only on abundant wealth; they are not related only to the desire to demonstrate symbolic difference in status. Increasingly important, according to them, is for people to show they are following ordinary consumption and lifestyle practices. The middle strata follow ordinary lifestyles and define themselves as the middle mass of ordinary people. They want to be “like the others”, “like most people”, and not to differ from them in their consumption patterns. After decades of highlighting great differences in the ways and forms of consumption, in consumer values, attitudes, tastes, and lifestyle, now the members of the middle strata feel comfortable when “merging with the mass” (Savage et al. 1992).

According to Juliet Schor in mid-1990s American middle class became “decidedly anxious… apparently more concerned with what they could not afford than with what they already had” (1998, 12), which made them feel “materially dissatisfied” (ibid. 6).

In postmodern society cyclic recurrence and repetitiveness are evident not only in fashion trends but also in the consumption patterns and lifestyle of the vanguard strata of consumption, the middle strata. In the 1950s they typically displayed “dull conformism and mass consumption” (Featherstone 1991, 83); then, between the 1960s and 90s, there was increased variety and diversity, connected with their striving for distinction. Since the 1990s the emphasis has gone back to similarity to, rather than difference from, the other social strata. A kind of spiral movement can be traced, the latest trend being a sort of repetition at a higher level of the starting position.
CHAPTER ONE:

THE TAIWANESE MIDDLE STRATA: FORMATION, DEVELOPMENT AND LIFESTYLE

1. Middle Class Formation and Development in Post-war Taiwan

What are main reasons for quick and stunning economic growth of Taiwan since the 1960s? What are the most influential factors, stimulating successful political democratization of the country since the 1990s and where should we look for forces, ensuring nation’s stable social development? Following chosen stratificational methodological approach answers of all these questions will be searched in social structure of Taiwanese society and more precisely in its middle classes patterns of development and lifestyle.

According to Hsiao (1993, 9) in Taiwanese understanding of the term the meaning of the notion of the middle class could be “middle propertied class” or “middle propertied strata”; intermediate class” or “intermediate strata”, and general reference to this important social formation is as to the “solid middle” with heterogeneous structure. Certain standard of living and lifestyle generally are seen as important criteria by which middle class and middle strata are distinguished from other social groups. Because of its heterogeneity Hsiao recognizes as more precise the term “middle classes” in plural, instead of singular “middle class” in order to emphasize significant internal differences between different social groups belonging to this social-group formation. The sociological concepts for defining objective middle class in Taiwan are based mainly on neo-Marxist (Wright) or on neo-Weberian (Goldthorpe) framework. Since the middle class is not a homogenous social group, within it are distinguished old and new middle class, and upper-middle, middle-middle, and lower-middle class. The old middle class encompasses all the strata whose existence as social groups is derived from the pre-industrial and pre-modern society. These are predominantly the small artisans, traders, farmers, and people exercising independent professions, such as doctors, dentists, lawyers, etc. By new middle class we mean all the social strata that have been created in modern times. These are people connected
with large social organizations, institutions, etc., and include managers, specialists, professionals, experts, technicians, civil servants, etc. Upper-middle class, also called “the elite or elites” encompasses people with considerable power, economic, cultural, and other resources. Upper-middle class are those among the middle class who have been relatively more successful in their business or profession, have higher income, greater civic activeness, and better consumption opportunities. The lower-middle class includes groups with more limited financial capacity, with a secondary education, such as skilled workers, civil servants, traders, and other non-manual workers, small business persons, small farmers, etc.

Table 3:
Class Structure of Taiwan in 1992 (%)

<table>
<thead>
<tr>
<th>Class</th>
<th>Distribution (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capitalist</td>
<td>2</td>
</tr>
<tr>
<td>Middle class, comprising:</td>
<td>34</td>
</tr>
<tr>
<td>Old middle (small employers)</td>
<td>9</td>
</tr>
<tr>
<td>New middle, including:</td>
<td>25</td>
</tr>
<tr>
<td>White collar managerial</td>
<td>15</td>
</tr>
<tr>
<td>White collar professional</td>
<td>10</td>
</tr>
<tr>
<td>Petty bourgeoisie</td>
<td>18</td>
</tr>
<tr>
<td>Working class</td>
<td>40</td>
</tr>
<tr>
<td>Small farmers</td>
<td>6</td>
</tr>
</tbody>
</table>

In Taiwan\(^7\) during the 1970s, the 1980s and the 1990s, due to relocation of manufacturing from advanced economies to newly emerging ones, the number of small firms instead of declining experienced rising. The quick economic development and the growing well-being after the World War Two brought to the gradually development of the middle class: professionals, managers, administrators, entrepreneurs, etc. In 1992 about one third of working population in

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\(^7\) Source – Hsiao 2001, 166.

\(^8\) Similar to some other East Asian countries like South Korea, Singapore and Hong Kong, for more details see Hsiao and So 1999, 3.
Taiwan is estimated as **middle class by objective criteria**, such as education, occupation, and income. According to the same data (see Table 3) around a quarter of employed Taiwanese belongs to the new middle and about 9% to the old middle class.

Similar to Japan during the 1970s, in Taiwan 20 years later there was a *state policy of purposeful and methodical support for the development of the new middle strata*. They enjoyed high social prestige and received income corresponding to it. During the 1990s as a result of industrialization, establishment of modern state with its institutions and administration, development of education, healthcare system, welfare and service sectors, **middle class developed as the second biggest social-structural formation after the working class** in Taiwanese society. Its quick enlargement is closely connected with ongoing processes of intergenerational upward mobility (Hsiao 2012, 42). Class classification scheme, used in East Asian Middle Classes (EAMC) project was elaborated on the base of John Goldthorpe (1987) classification scheme. Colossal socio-economic and structural changes since the 1970s “have led to a significant expansion of middle class position, primarily of new middle class and marginal middle class” (Hsiao 1999, 10-11).

New middle class almost doubled its share increasing from 15% to 27% (Graph 2), and has remained at this proportion ever since. One third of these people work for large companies, one fourth, for state institutions, and about 40%, for small and middle firms (Tsai et al. 2014, 61). For the same period from the 1970s till the 1990s the relative share of marginal middle class rises, and the relative share of old middle class decreased. New middle class stands out with its higher educational achievements – in the same period 59% of its representatives have BA or higher education level, which holds true for 22% of marginal middle and 10% of old middle class which is with the lowest educational level among other middle class segments.

Taiwanese middle classes arise during the 1980s and stabilize during the 1990s. Since 1997 Taiwanese society, as part of the increasingly globalizing world economy is affected by financial crisis influencing “the speed and course of the formation” of middle classes (Hsiao 2006, 5). As a result of the social-economic and structural transformations in the society and the world, important changes can be seen in the lifestyle of various social strata in Taiwan. The

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9 EAMC research project, conducted in the second half of 1992 was based on the following classes: 1) capitalist class, hiring 20 or more employees; 2) new middle class; 3) old middle class; 4) marginal middle class; 5) working class; 6) farmers (Hsiao 1999, 9).

10 These and the following EAMC research project data are quoted from Hsiao and So 1999, 26-28.
relative share of objective middle class remains relatively stable but there are changes in different middle class representatives’ self-identification indicating the rise of phenomenon of “middle class status anxiety”, especially among old middle class and marginal middle class which fell in more vulnerable socio-economic position.

Graph 1\textsuperscript{11}:
Class Structure Changes in Taiwan 1990-2006 (%)

In 2006 the previous scheme, used in EAMC research project during 1992 is enlarged to nine classes. According to Taiwan Social Change Survey\textsuperscript{12} (TSCS) in 2006 the relative share of objective middle class is about 47\% (Tsai et al. 2014, 19) from working population which indicates 13\% growth compared to 1992 data (see Graph 1). New middle class remains stable during the same period with its relative share of near 27\% (6\% managers and 21\% professionals

\textsuperscript{11} Source – TSCS 2006, See Tsai et al. 2014, 27.

\textsuperscript{12} The class scheme, used in quoted survey comprises nine classes : 1) the capitalist, hiring ten or more employees; 2) the manager; 3) the professional; 4) the small employer, hiring no more than 9 employees; 5) the self-employed; 6) the routine non-manual employee, who possesses lower level skills and performs office work; 7) the working class; 8) farmers; 9) military personnel (See Tsai et al. 2014, 18).
in 2006, see Graph 1). **One fifth of working population belongs to the old middle class,** compared to 9% in 1992; 6% of working Taiwanese in 2006 are small employees and 14% – self-employed. According to the 2006 TSCS data the marginal middle class includes 23% of working population, decreasing from 41% in 1992 (Graph 1). During this period of 26 years the capitalist class and managers experienced decrease, the relative share of the former fell from 2% to 1%, and of the later – from 10 to 6% of working population. The share of small employees also shrank from 9% to 6%, and of self employed – with one third, from 21% to 14%. This means the reduction of old middle class. Farmers’ share also dropped off by a half – from 6% to 3%. The relative share of working class slightly increased from 22% to 24%, and that of marginal middle class (or routine non-manual employees) rose with almost a half – from 16% to 23%. The most significant changes are witnessed in relative share of professionals, which grew up with more than a half – from 13% to 21%. Explanation of these structural changes is long time domination of small and medium-sized firms in Taiwan economy (Tsai et al. 2014, 28), which needed reduction in managerial staff and expansion of qualified and educated professionals.

**Professionals** are the youngest middle class representatives; their mean age is 39 years, same as the mean age of routine non-manual employees, belonging to the marginal middle class (Graph 3). Quoted data illustrate characteristics of Taiwanese economy, dominated by service sector which is preferred by young population. **Managers** are the oldest new middle class representatives (mean age 48), and small employers with mean age of nearly 54 are the oldest among old middle class representatives (Graph 3). Relative share of **working class** is almost 24% of employed Taiwanese and their average age is 45 years. **Farmers** are 3% and their average age is the highest among all working population – almost 68 years, and more than 78% of them are women. Much higher mean age as well as the domination of women among farmers indicates the low prestige and evident feminization of their profession. Their average income is much lower compared to this in industrial sector and services; their labor is hard and economic outcome is unsure, heavily dependent on nature and weather.

Routine non-manual employees hold the second place as a group with large share of women – around 70% of them. More than a half of professionals (53%) are women, but men are dominating among capitalist class representatives – 82%, managers – 72%, small employers – 74% and self-employed – 64%.
Graph 2:\nRelative share of different classes (as proportion of the total working population)

![Social class in Taiwan](image)

Calculated by the data cited in the Graph 2, the **new middle class**, including the share of military personnel, comprises between a quarter and one third of all occupied persons (29%), and is a most numerous social class in contemporary Taiwan. It includes managerial class (6%), professional class (21%), and military personnel\(^{14}\) (2%). The **old middle class**\(^ {15}\) is estimated as more than a quarter (23%) of all occupied.

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\(^{13}\) Graph 2 and the following Graph 3, present data from TSCS, conducted in 2006 and I build them on the basis of data presented in Tsai et al. 2014, 19-32. The information from TSCS survey analyzed below is cited from the same source, so Tsai et al. designations of social groups are used.

\(^{14}\) Tsai et al. 2014 calculated the relative share of these three social groups (managerial class, professional class and military personnel) separately but following the goal and framework of analysis in the text these very similar and close to each other social-structural formations are presented together as new middle class representatives.

\(^{15}\) In this class are included small employers hiring till nine employees, self-employed and farmers. In Tsai et al. these social groups are presented separately but having in mind above mentioned reasons in the text they are presented as “old middle class”.
New middle class, as the biggest middle class segment, stands out by its higher income, education, market situation advantages, which make its social-group position stable even during periods of economic crisis and instability. Middle class remains as balancer and mediator with its economic, social and cultural position in stratification ladder, located on the middle between capitalist and working class.

2. Subjective middle class in Taiwan

The share of those who self-identify with the middle class in 1992 shows that those who have placed themselves in this category, i.e. the so-called “subjective middle class” are far more than those who fall into the “objective” one; they are more than a half of the working population. More precisely 89% of new middle class, 62% of marginal middle and 59% of new middle class self-assessed themselves to the upper middle or middle class while at the same time
the same is true for 45% of working class representatives (ibid. 10-12). EAMC research data illustrate **middle class heterogeneity**: for example, with the regard of social origin, the old middle class and marginal middle class are more likely to have farmers or working class origin, and they are more inclined to self-identify themselves with working class and lower class\(^{16}\).

This phenomenon of high **self-identification with middle class** can be observed not only in Taiwan but also in different type of societies, including Japan, China, Bulgaria, as well as in other Eastern and Western countries\(^{17}\). For instance in Japan during the 1970s and the 1980s, the subjective middle class attains, according to some surveys’ results, as much as 90% of respondents. In some societies during the period of rapid economic development and increased prosperity there has been a diffusion of believe that the greater part of society belongs to the middle class. The data of comparative international surveys show that 90% of respondents in Canada, West Germany (71% in 1986), Italy, Brazil, India, South Korea, the Philippines, Singapore, USA and Australia self-identify as middle class\(^{18}\). The phenomenon of “middle self-identification” itself indicates the importance of the middle class in societies of varying levels of development. The fact has been widely commented in relevant literature. Jonathan Kelley and Mark Evans have analyzed the psychological causes that make people identify as belonging to a certain group or community. According to the quoted authors, self-identification as middle class is a kind of relating to a social “mean”. They see this as a typical phenomenon of mass consciousness. People avoid the “extreme” social positions and identify with the majority, with the “others”\(^{19}\).

Scholars have also sought an explanation to this in the impact of the following factors:

- **The growing share of non-manual occupations in modern and postmodern societies;**
- **The symbolic importance for the middle strata of the modern lifestyle;**
- **The prestige of belonging to the middle class;**
- **The changes in consumption patterns.**

The greater part of those self-identifying as belonging to the middle strata, actually have in mind belonging to it in terms of *prestige*, i.e. they assess themselves as middle prestigious class, and make their estimate on the basis of their

\(^{16}\) For more details see Hsiao and So 1999, 41-45.

\(^{17}\) Goldthorpe 1982; Savage et al. 1992; Crompton 1996; Butler and Savage 1995; Savage, Bagnall and Longhurst, 2001.

\(^{18}\) Kosaka, 1994, p. 110.

\(^{19}\) Kelley and Evans 1995, 157-158.
lifestyle, consumption and position in the “middle” of the stratification range, not according to economic resources, in other words not as a “middle economic class”.20

Using latent class analysis method to discover middle class self-identification mechanisms in Taiwan on the base of Taiwan Social Change Survey (TSCS) from 1997, Kuan (2006, 199-200) arrives to the conclusions about different ways of understanding of “working class” and “middle class” depending on respondents’ sex, marital status and spouses’ educational and occupational level. According to Kuan’s findings working class is understood by about a third of the population as participation in the labor market. The working class identities are very likely to be chosen by unskilled or skilled laborers or service workers. Middle class self-assessment is preferred by more highly educated respondents from both sexes, self-employed men, and even from those who do not participate in labor force. Men and women seem to have different perception about class membership: men are much more inclined to identify with lower middle class and lower classes, when women prefer to place themselves in the social middle. This “variation of class image” (ibid. 200) is explained by differences of male and female work and family life experience. Spouses’ educational level and occupation reflects their wives’ class self-identification, which is not as much true to the male respondents. Women (who may otherwise incline to identify as lower class) are much more disposed to judge their social position as higher then working class because of their husbands’ higher level of education or supervisory job. The conclusion is that Taiwanese men understanding of social class position is not connected with their wives socio-economic characteristics which prove to be the opposite in the case of women’s view on their class location.

Using data from TSCS 2006, Table 4 describes how respondents evaluate their social standing using for their judgment the scale of five classes: upper, upper middle, middle, lower middle and lower class (Tsai et al. 2014, 24). New middle class representatives self-evaluate as positioned at upper level of social ladder. Managers have the highest level of self-identification; they consider themselves as belonging to the upper location of social stratification structure. Second position is hold by professionals, followed closely by capitalists. Self-employed and working class are very similar in their self-consideration in the lower stratum of society and the lowest position is chosen by farmers. Women self-identification is higher than men for all social-structural groups, except farmers.

20 Keliyan 2008, 97; Keliyan 2012b, 123.
Table 4\textsuperscript{21}:
Subjective status evaluation of social class in Taiwan 2006
(Five classes scale)

<table>
<thead>
<tr>
<th>Social class</th>
<th>Total</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capitalist</td>
<td>3.07</td>
<td>3.05</td>
<td>3.20</td>
</tr>
<tr>
<td>Managerial</td>
<td>3.17</td>
<td>3.04</td>
<td>3.52</td>
</tr>
<tr>
<td>Professional</td>
<td>3.08</td>
<td>2.99</td>
<td>3.16</td>
</tr>
<tr>
<td>Small employers</td>
<td>2.89</td>
<td>2.86</td>
<td>2.97</td>
</tr>
<tr>
<td>Self-employed</td>
<td>2.60</td>
<td>2.57</td>
<td>2.65</td>
</tr>
<tr>
<td>Routine non-manual</td>
<td>2.85</td>
<td>2.75</td>
<td>2.90</td>
</tr>
<tr>
<td>employees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working class</td>
<td>2.59</td>
<td>2.54</td>
<td>2.66</td>
</tr>
<tr>
<td>Farmers</td>
<td>2.25</td>
<td>2.58</td>
<td>2.14</td>
</tr>
</tbody>
</table>

3. Middle class living standard and lifestyle

What is the living standard of Taiwanese middle class, does it hold stable and prosperous social position in terms of income, ownership and lifestyle in general?

According to TSCS, in 2006 41\% of the working population monthly earning is over 30000 NT\$, which is 1.2 times the starting salary of a graduate from a university with good reputation. Taiwanese middle class is in favorable position: 79\% of managers, 64 \% of professionals and 67\% of small employers (similar to capitalist class) have monthly income over 30000 NT\$ (see Graph 4).

There is not a significant gender division between men and women managers, women earning above 30000 NT\$ are slightly more (3\%) then men. Among professionals, small employers and capitalist the share of women with such salaries is about 9\% less than men, which indicates gender income inequality. The biggest income gender gap among middle classes is

\textsuperscript{21} Source of Table 4 and Table 5 are TSCS 2006, See Tsai et al. 2014, 24-25.
witnessed in the case of self-employed where only 13% of women’s income exceed 30000 NT$, against 42% of men (Graph 4). More than a quarter from routine non-manual employees (26%) and working class (27%) receives over 30000 NT$; men and women from both classes are highly unequal in terms of their wages distribution. In the case of routine non-manual employees 32% of men receive over 30000 NT$ which is true for 23% of women; the drastic gender income gap is seen among working class where 42% of men have such earning against only 7% of women, which is 6 times less. Farmers are the less paid social class in Taiwan, only 1.8% of them receive over 30000 NT$, without women representatives in this group of bread earners which means the later are unpaid family worker in the farms.

Graph 4:\n
Different classes monthly individual income over 30 000 NT$\(^{22}\) (%)


During the time of survey 30 000 NT$ are approximately equal to 1000 US$ and the amount is twice bigger then official minimum monthly wage in Taiwan.
New middle class enjoys higher income level, modern lifestyle and various cultural activities: according to EAMC survey from 1992 (Hsiao and So 1999, 26-27) two thirds of its members have a car, 61% - credit card, one third - hand camera, 83% owe their own residence, and near one third have a second flat. For comparison 68% of old middle class, 56% of marginal middle and 43 % of working class have automobile; 24% of old middle, 41% of marginal middle and 13 of working class have credit card; hand camera possess 22% of old middle and the same relative share of marginal middle, and 11% of working class. The patterns of home ownership rate are similar between new middle class and marginal middle (83%), and old middle (69%) and working class (72%). More than a quarter - 27% of old middle class, 23% of marginal middle and 8% of working class have a second flat. House ownership rate is high in Taiwan but other important question is about the size, quality, aging, facilities, etc. of the residence.

New middle class is much more concerned about children extra curriculum education: more than one third of their children attend arts and sports classes after school; the same is true for less than one fifth of old middle class children, 15% of marginal middle class children and one tenth of working class children. Special attention is paid to the new middle class children foreign language education – more than one fifth of them go to such additional classes, against 14% of old middle class children, 10% of marginal middle class and 5% of working class children. New middle class members invest in their children computer education: during late 1992 one tenth of them take computer classes, while only 4% of old middle class and working class and 3% of marginal middle class children are participating in such courses.

New middle class is leading active modern lifestyle, taking part in different cultural activities – near a half of it (47%) go to concert, while less than one fifth of old middle (19%), more than one third (35%) of marginal middle and 9% of working class chose such kind of activity during their leisure time (Hsiao and So, 1999). 14% of new middle class members play golf, which is not so popular (or affordable) among other classes representatives. 7% of new middle class are social club members and more than one third (35%) travel abroad, compared to 22% of old middle class, 17% of marginal middle and 6% of working class.

Data from Table 5 indicate capitalists are much satisfied with their quality of life, followed by new middles - managers and professionals. Old middle class representatives – small employers and self employed are less satisfied, and farmers are most unsatisfied social class with the level of satisfaction lower even compared to that of routine non-manual employees and
working class. For all social groups, women show the higher level of life quality satisfaction, then men from the same social group, with an exception of farmers. This is very interesting finding, because for all social groups women in general are situated in more unfavorable economic conditions. Table 5 data show women from all social groups are less satisfied with their health. Women higher level of quality of life satisfaction could be explained probably by reasons outside their health condition or economic rewards; they could be searched in their family life, children, and etc. factors. The most satisfied with their health are new middle class representatives, followed by capitalist class members, and farmers declare the poorest health condition, probably connected with their higher average age.

**Table 5:**

*Life quality evaluation by different classes in Taiwan 2006*

<table>
<thead>
<tr>
<th>Social class</th>
<th>Satisfaction with life</th>
<th>Satisfaction with life</th>
<th>Satisfaction with life</th>
<th>Satisfaction with health</th>
<th>Satisfaction with health</th>
<th>Satisfaction with health</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Men</td>
<td>Women</td>
<td>Total</td>
<td>Men</td>
<td>Women</td>
</tr>
<tr>
<td>Capitalist</td>
<td>4.26</td>
<td>4.23</td>
<td>4.40</td>
<td>3.85</td>
<td>3.86</td>
<td>3.80</td>
</tr>
<tr>
<td>Managers</td>
<td>3.88</td>
<td>3.78</td>
<td>4.13</td>
<td>4.05</td>
<td>4.11</td>
<td>3.90</td>
</tr>
<tr>
<td>Professionals</td>
<td>3.86</td>
<td>3.79</td>
<td>3.92</td>
<td>4.00</td>
<td>4.05</td>
<td>3.95</td>
</tr>
<tr>
<td>Small employers</td>
<td>3.74</td>
<td>3.67</td>
<td>3.93</td>
<td>3.81</td>
<td>3.82</td>
<td>3.80</td>
</tr>
<tr>
<td>Self-employed</td>
<td>3.64</td>
<td>3.57</td>
<td>3.76</td>
<td>3.56</td>
<td>3.68</td>
<td>3.35</td>
</tr>
<tr>
<td>Routine non-manual employees</td>
<td>3.69</td>
<td>3.58</td>
<td>3.74</td>
<td>3.84</td>
<td>3.93</td>
<td>3.80</td>
</tr>
<tr>
<td>Working class</td>
<td>3.63</td>
<td>3.49</td>
<td>3.82</td>
<td>3.78</td>
<td>3.85</td>
<td>3.68</td>
</tr>
<tr>
<td>Farmers</td>
<td>3.56</td>
<td>3.92</td>
<td>3.46</td>
<td>3.10</td>
<td>4.00</td>
<td>2.85</td>
</tr>
</tbody>
</table>

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24 Measured in means, scored from “very unsatisfied” – 1 to “very satisfied” – 5.
4. Middle class, ethnicity and politics

Taiwan is a multiethnic society and TSCS data prove its growing openness for upward social mobility for major ethnic groups – Minnanese, Hakka and Mainlanders. This tendency is developing together with still remaining ethnic division and significant inequalities; for example Mainlanders are in much favored position to achieve new middle class status which is the most advantageous one among all middle class major social groups.

Graph 5:
Class Structure and ethnicity in Taiwan 1990-2006 (%)
(Part I – Managers and Professionals)

TSCS results presented in Graph 5 show the relative share of managers during 1990-2006 period is declining among all major ethnic groups in Taiwan. But the Mainlanders still remain most represented among them – 11% of Mainlanders are managers, against 6% of Minnanese

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25 The population of Taiwan of its biggest part is from ethnic Han origin; the aboriginal people are about 400,000, or less than 2%. Because of their small number and the lack of information about them in TSCS database, their case is excluded from this analysis. Among Han people, the most numerous are Minnanese (or Hoklo) Taiwanese, who amount more than two third or 70% of the population. Hakka share is about one fifth of Taiwanese Han population. Mainlanders immigrate from mainland China in 1949 during ROC government relocation to Taiwan and that time they were about 1.3 million people. Their relative share is about one tenth of the population (The Republic of China Yearbook 2012, 26-28).

26 Source of Graph 5, Graph 6 and Graph 7 – TSCS 2006, See Tsai et al. 2014, 29.
and 4% of Hakka; actually the total amount of relative shares of Minnanese and Hakka managers is equal to this of Mainlanders managers. The share of professionals is almost doubling for Minnanese (from 11% the share of Minnanese professionals reaches 21%), and for Hakka (from 11% to 20%), when for Mainlanders it grows slightly from 23% to 26%. Mainlanders get more access to managerial position while for Minnanese and Hakka professional job is much reachable; Mainlanders keep stable their presence at occupations as professionals.

We could conclude that “despite greater openness to entry into the new middle class for the two Taiwanese groups previously excluded, their odds of moving up lagged far behind those of the Mainlanders” (Tsai et al. 2014, 28).

Graph 6:
Class Structure and ethnicity in Taiwan 1990-2006 (%)
(Part II – Small employers and Self-employed)

The data presented in Graph 6 clearly demonstrate the decline of relative share of Taiwanese old middle class - small employers and self-employed which is evident for all major ethnic groups. Only the share of Hakka small employers and self-employed remains relatively stable. The share of Mainlanders small employers is dropping sharply from 6% to almost insignificant 1%. Self-employed Minnanese decrease with one third (from 23% to 16%), and for
Hakka this reduction is almost half (from 23% to 11). From 8% self-employed Mainlanders in 1990, in 2006 only 5% remain in the same status.

Data cited in Graph 7 illustrate the rise of both marginal middle class (called routine non-manual employees in TSCS) and working class for all major ethnic groups of Taiwanese society. The more obvious is the increase of Hakka routine non-manual employers – with 10%, from 13% to 23%; the share of Minnanese with the same occupation grows with a half – from 15% to 23%, and of Mainlanders with a quarter, from 20% to 25%. There no registered changes in relative share of Minnanese and Hakka working class; this of Mainlanders grows with 5% for the period 1990-2006 (from 13% to 18%) but they are less inclined to take a working class position compared to other two main ethnic groups.

Graph 7:
Class Structure and ethnicity in Taiwan 1990-2006 (%)
(Part III – Routine non-manual employees and Working class)

Results from TSCS clearly demonstrate that the new middle class positions in Taiwan are more open to Mainlanders, more of one third of which (37%) belong to the new middle class in 2006. Around a quarter of each of other two main ethnic groups – 27% for Minnanese and 24% for Hakka are located in such stratification location. Only 6% of Mainlanders belong to the old
middle class, compared to 23% of Minnanese and 18% of Hakka. Mainlanders achieve more favorable middle class position – this of new middle class which is with much more stable and prestigious status then old middle class in Taiwanese society.

According to the theories on middle class political role we could distinguish on the one hand, views on middle class as important condition for development of democracy (most influential among them are concepts of Aristotle, 1953 and S. M. Lipset 1963, 1964). On the other hand, it is well known historical fact some social groups, belonging to the middle class, as petty entrepreneurs and commerchants for example, in some socio-historical conditions could become a social basis of regimes similar to this of Nazi Germany. According to C. W. Mills (1956, 1962) assumption, some social groups belonging to the new middle strata, connected to the giant corporations and govermental structures, could also under some circumstances hinder the processes of democracy. Some civil society groups, independent and voluntary associations could play not only stimulating, but also in some cases following their own goals and interests, could have negative impact on the development of democracy. Analyzing the above mentioned concepts, Hsiao poses the crucially important question about the role of middle class in Taiwanese society. Are they stimulating or rather hindering the rise of democracy in this country? What are political and social roles of their civil society groups’ activities in the process of democratization? He concludes that „the sustainable links between a liberal middle class and pro-democracy civil society have underpinned Taiwan’s social and political vitality” (Hsiao 2012, 42).

EAMC research results show three middle class segments share similar political attitudes: they strongly believe in their social and political mission. Taiwanese middle class is seeing itself as a precondition for stable socio-economic development and democracy in its own society: more precisely 80% of agree with the statement “middle class has made great contribution to the development of society” (Hsiao and So 1999, 35). Two third of middle class express opinion “middle class is vanguard of democracy” and new middle class is more likely to be supported for political position by other middle class representatives. Among new middle strata, professionals and scholars are most supported and trusted by other middle class members: one third of new middle class, 28% of old middle class, 40% of marginal middle and 28% of working class think professionals are more suitable to take position of government officials27. The second highly

27 Hsiao and So 1999, 40.
supported social group are scholars – a fifth of new middle class, a quarter of old middle and less than a quarter of marginal middle and working class consider them appropriate for the position of government officials. The similar tendency of political support and trust is evident regarding positions of legislators and social leaders: 47% of new middle, 31% of old middle, 36% of marginal middle and 27% of working class believe professionals have a capacity to be legislators; and 48% of new middle, 37% of old middle, 43% of marginal middle and 32% of working class see them as capable to be social leaders. Scholars are also seen as competent to attend position of legislators – 26% of new middle and the same share of old middle, 27% of marginal middle and 21% of working class share this opinion. They are also regarded as competent for social leaders, according to 28% of new middle, 30% of old middle, one third of marginal middle and more than a quarter of working class.

TSCS data for 2006\textsuperscript{28} show all middle class segments and working class strongly support the government policy to increase expenditure for education: this opinion is expressed by 70% of managers, 75% of professionals, 66% of marginal middle class, 68% of small employers, 60% of self-employed and 68% of working class. Taiwanese from different social groups are consolidated around the idea of significance of education in contemporary society and the need of government policy for its development. But the same is not true when it comes to the increase of government expenditure for environmental policy: only new middle class (82% of managers and 76% of professionals) and 74% of marginal middle class support it.

\textsuperscript{28} Tsai et al. 2014, 31.
CHAPTER TWO:

MIDDLE STRATA IN CHINA

1. The middle strata as symbol of desired social prosperity in post-reform China

After the World War Two China developed as communist country ruled by communist party; market and democratic institutions were abolished and a plan economy system was imposed. At that time the so-called “socialist industrialization” was implemented, meaning a “communist version of post-war modernization”. The imposed model proved ineffective and in 1978 China declared a course of market-oriented changes and opened its economy. As a result of the long and complicated road covered by the country, by the end of 2014 China became the first in rank world economic power in terms of its nominal GDP and the country is keeping its economic growth. China is conducting reforms in a unique way of its own, building an economy based on market principles but at the same time maintaining the monopoly of the communist party in politics, and developing “socialism with specific Chinese characteristics”. Some of the serious problems confronting Chinese society are: the irregular pace of development in the separate parts of the country - the wealthy Eastern coast and the poor inner regions; the enormous social-economic inequality between the urban and rural regions; the large rate of industrial pollution that is a threat to the ecological balance, high level of corruption, etc.

In these circumstances, what is exceptionally important for China is the stable presence of the middle strata in the social stratification structure. The importance of these strata for every modern society comes from the fact that the processes observed in these strata can serve as a measure of the speed, direction and success of the social transformations. The development of the middle strata, the changes in their lifestyle are indicators of what is happening in society at large.

Since 2002 the high governing circles of the Chinese Communist Party declared that the goal of public development was the achievement of xiaokang shehui (a moderately well off society). The notion of xiaokang shehui already existed more than 2500 years ago, and was first
developed by Confucius. In its contemporary meaning *xiaokang shehui* signifies a society in which most people live in prosperity and the *middle strata are widely present.*

As a result of the Chinese reforms, a situation came about in which the **concept itself of “middle class” acquired some kind of political connotation** and turned into a **symbol of desired social prosperity.** The ruling political elite looks upon the *middle class* as a **guarantee of the stability of the existing political system;** it is perceived as a **condition for the economic prosperity** of society and hence for preserving the political status quo. The governing authorities are well aware of the importance of the middle strata for the development of China, for the preservation, maintenance and stimulation of economic growth, for the position of the country in the international community. The strategy of the Communist Party for the development of the middle strata has been defined by some authors as a “social engineering project of the contemporary reformist state and its agencies” (Tomba 2004). In China the *middle strata developed in the 1990s not so much as a result of the work of market mechanisms, but through the stimulus of the state.*

When studying contemporary Chinese society, the question arises as to which social strata are in a “winner’s” situation in the transition. The most dramatic and visible changes in post-reform China are those in consumption patterns and lifestyle. In social stratification self-identification term people consider themselves in terms of consumption, rather than of their relation to production (Keliyan 2008). The question of consumption is of key importance in contemporary politics, “elections are now fought increasingly over the issue of who can most efficiently manage the economy, in short who can provide the resources to households to buy and in turn ‘deliver the goods’” (Miller 1995, 16). The causes of the collapse of totalitarian socialism, apart from the political ones, are related to the imposed system of consumption patterns at the time, described “as a culture of shortage… of an idealized economic system” (ibid.). The social changes in everyday life usually are described with politically oriented rhetoric, combined with the rhetoric of one’s personal experience of consumption, and that association “can be interpreted as one of the most natural ways of appropriation and/or rejection of the societal changes and the discursive regime in which these changes are enveloped” (Oushakine 2000, 101). For example the communist and post-communist societies are associated with the dominant elements of consumption of the time (ibid. 114).
The logical question is whose lifestyle and consumption patterns have undergone the most significant positive changes and the most tangible improvements of standard in China? The answer that the public is offered by the governing authorities, the academic community and the media in China, is that the middle strata, by their lifestyle, are the symbol of post-reform changes; there is imposed and suggested public image of the middle strata as the symbol of positive lifestyle changes; they are perceived as a category undergoing a “consumer boom”.

While the middle strata of the rapidly developing megalopolises in the highly industrialized eastern coastal area symbolize the success of the reforms and enjoy a high living standard, the Chinese pensioners, the low-skilled workers, the residents of small towns and especially of villages, the migrant workers in big city centers, are in a disadvantaged social-economic situation. According to UN criteria and data, the inhabitants of Shanghai have a living standard identical with that of the Portuguese, while in Tibet the standard is at the level of poor African countries (The China Human Development Report 2005).

In 2005 the Gini coefficient\textsuperscript{29} for China was 0.45, given that the borderline where the range of alarm begins is 0.40, and only 31 of the 131 countries surveyed by UNDP come after China in this respect. The huge income inequality continued to rise during the next decade and in 2014 this coefficient increased to nearly 0.47 and China ranked at 28 position\textsuperscript{30}. Among four investigated in this work societies China is the country with the deepest and most sharply growing income inequality. For example in Japan Gini coefficient kept its continuous rising from less than 0.30 during 1980s till 0.38 in 2011 ranking the country at 74 position. For Bulgaria the Gini coefficient also has seen an increase from approximately 0.31 to 0.36 for the period 2005-2012 and country ranked on 89 position. The society with most equal household income distribution among four studied countries is Taiwan holding 99 position among 144 countries in 2012 with Gini coefficient of less than 0.34. But here too has been witnessing the clear tendency of consistently rising in the coefficient, starting from 0.27 in 1980s, 0.28 in 1990s, and a less than 0.30 in 2000. In all of the studied four countries during the last decades is evident the trend of growing income inequality, but the speed of this change is slower in Taiwan and more rapidly.

\textsuperscript{29} This coefficient is used to measure the income distribution among households and its values are an indicator of economic inequality in a society. The nearer the value is to 0, the more evenly distributed the incomes, and the nearer to 1, the greater the inequality of incomes.

\textsuperscript{30} According to the data presented by Central Intelligence Agency, The World Factbook, about the Distribution of Household Income (Gini coefficient) in Different Countries - https://www.cia.gov/library/publications/the-world-factbook/rankorder/2172rank.html. The data presented ranking among the studied 144 countries.
rising in China. In Taiwan, China, Japan and Bulgaria the Gini coefficient increases with age, especially affecting people in their late fifties and sixties\textsuperscript{31}, but on the other hand it is evident the rise of inequality also among younger people.

The cited social-economic inequalities between various status groups has led to the description of the social-stratification of China as being in the shape of “a reversed letter T”, because of the “irrationally large part” of the lower class in Chinese society (Li Q. 2006\textsuperscript{32}).

2. Middle class and the middle strata in Chinese sociology

The ideological restrictions that existed in China during the communist past left a mark on the orientations of theoretical research in its sociological traditions. The concept of “social stratification”, “middle strata”, and “middle class” do not fit into the framework of classical Marxism, where the term used would be “bourgeoisie”. In orthodox Marxist paradigm, researchers remain in the framework of class analysis, where there is no place for a middle class, but reference is made to “intelligentsia” and “the new worker stratum”. According to the accepted class, there are two basic classes in society: workers and peasants, and the intelligentsia, whose analogue in developed societies are the professionals, is reduced to a layer serving workers’ and peasants’ interests.

In post-reform Chinese society, and the debates regarding middle class concern the criteria for defining the boundaries of this class.

Among the numerous definitions of the middle class, many are based on the income criterion, which varies in a rather wide range. Since Bourdieu (1984), it has been generally accepted that equal income does not mean similar consumption, but to the contrary, it is especially important to consider the impact of “tastes” on the lifestyle, which are a significant component for defining social-status differentiation.

A number of authors connect the consumption patterns of the middle strata with the issue of stability of economic development, and they caution that the decreased “consumption

\textsuperscript{31} About changes in Japan and Taiwan see Shirahase 2014, 25.
\textsuperscript{32} Cf. China Daily, 08.08.2006; the conclusions are drawn on the basis of an analysis of statistical data from the latest population census in PRC.
capacity among the traditional white collar middle strata” is a risk to the stability of economic growth (Li, Q. 2001). The social status of the middle strata is defined outside the traditional relationships at the workplace. It is considered that consumption has an increasingly large impact on social relationships, because the social nature of urban dwellers is changing from *danwei* (work-unit) individuals to *shehui* (social) individuals or *shequ ren* (community individuals). These processes are a result of increased purchasing power of urban public-sector employees.

A growing number of authors use the income criterion and consumption patterns in combination with indicators for occupation and education. The excessively vague boundaries of income, in which representatives of the middle class fall according to the numerous definitions, are unclear and too imprecise for fixing the stratum boundaries. The level of income assumed as indicator of middle class affiliation has been criticized for being too high, because groups with such income, especially in a country like China, are an *economic elite, not middle class* (Johnston 2004, 608). It is assumed that the middle class is a group with *shared interests regarding the issues of consumption, leisure time, material goods, education and information, as well as the desire for legal predictability* (Robison and Goodman 1996).

The media are suggesting to their audiences an image of the middle class as consisting mostly of young people in their early 30s; with a higher education, professionals with good jobs in the public sector; with high incomes and money to spend; with consumption patterns that display prosperity; with security regarding the future, with good pension and health insurance. Research team at the Chinese Academy of Social Sciences - CASS (Lu 2002, 252-253) define six important criteria for middle class identification: 1) type of work - intellectual labor in a safe and clean environment; 2) rights and duties at the workplace, including responsibilities, the right to speak up, make suggestions and exercise some form of control; 3) income, including all perquisites, patrimonial assets and other benefits directly or indirectly deriving from employment (25 000-30 000 RMB a year per person) despite the fact that average incomes are much lower even in the most affluent urban areas); 4) skills, especially education higher than high school, training and experience; 5) lifestyle and consumption habits; 6) moral and civic consciousness.

The other research team at the CASS engaged in a study called “Structural Changes of Contemporary Chinese Society” outlined *four criteria* to assess whether one belongs to the middle class: *professional status; income; patterns of lifestyle and consumption; and self-*
identification (Li, C. 2004). First, about 16% of those surveyed can be categorized as “middle class by profession” (zhiye zhongchan). Five professions: party and political officials, business managerial class, private entrepreneurs, technical skilled labor, and office workers, are labelled “white collar” professions. Secondly, about 25% are defined as “middle class by income”. There is no standard mean for all the regions surveyed, because the income gaps are huge between different places therefore the “mean” was calculated on regional basis. Thirdly, 35% of those surveyed are considered “the middle class by standards of consumption and lifestyle”. With some exceptions seen among the middle-aged and young people in metropolises, “so-called middle class culture has not appeared in China” (ibid.). Since a specific standard of “cultural” consumption was absent, the researchers developed an elaborate point system for measuring each household’s capacity for consuming medium-range and high-end luxury goods. The “consumer middle class” (xiaofei zhongchan) resulted from the calibration and comparison of the total scores earned by each household. The last category, “subjective cognition,” yields the largest percentage: as many as 47% of those surveyed considered themselves members of the “middle class.” However, if the four criteria are combined to arrive at a comprehensive index for the middle class, then the percentage of Chinese middle class dropped to about 7%. Even in big cities, the percentage is as low as 12% (Li, C. 2004).

Table 6:  
Composition of a Chinese urban middle class

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government officials</td>
<td>11.8%</td>
</tr>
<tr>
<td>Business managers</td>
<td>22.1%</td>
</tr>
<tr>
<td>Private business owners</td>
<td>9.8%</td>
</tr>
<tr>
<td>Employees of government agencies</td>
<td>23.9%</td>
</tr>
<tr>
<td>Professionals</td>
<td>32.4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

The disparity between the criteria chosen by various authors for defining middle strata boundaries stems from the fact that these strata are quite heterogeneous and they include structural elements with an “intermediate status” (Tilkidjiev 2002, 204). Some people, such as highly qualified professionals, administrators and managers, are situated in the upper range and are close to the elite, which is why they have been called the “new privileged class”. Others, such as skilled manual workers and technicians, supervisors of workers, routine non-manual employees, are in the lower ranges, close to the working class.

The “distance from the political, economic and cultural centers” and the differences between urban and rural areas “play a more important part in social stratification on the mainland China than in other countries” (Li, Q. 2002:116). In China it could be observed the above-mentioned “two cultural models” of social-group behaviour” (Tilkidjiev 2002: 389). The category of people exemplifying the first pattern are the middle strata; they are better educated, more enterprising and willing to take initiatives, they share post-materialistic values and a modern lifestyle. The groups embodying the second model are the less educated strata, those with lower income, who usually live in smaller settlements and in rural areas.

3. Middle strata patterns of development in China

The present-day social strata in China, including the middle ones, are connected in one way or another with the former social structures, and without knowledge of the latter it is impossible to trace the continuity between social-group structures or understand the construction of the new social order.

For Chinese sociologists it is very important and “essential for future sustainable development in China to bring about a reasonable order of social stratification with the aid of legal system”, because “without a legal economy there will be no moral economy” (Li, P. 2002, 45)
In the 1980s and early 1990s in China “there occurred fundamental changes in the framework of the distribution and allocation of social resources and wealth and in the basic context of social stratification” (Sun 2002, 61). The **winners by the economic reforms** where the people who **had the possibility of drawing public resources** from the economy and reinvesting them in productive activities in the form of private or collective enterprises (Tomba 2004). In China, like in other former communist countries in Central and Eastern Europe, including Bulgaria, “the old privileged groups managed to maintain their old pattern of intergeneration reproduction in the market-oriented transition by means of capital exchanges and their privileged access to social networks and human capital” (Li, L. 2003, 4). Since the middle of the 1990s the picture of “high achievers” became more complicated and this category started to include the expanding group of “urban professionals and skilled employees in both the public and private sector” (Tomba 2004.). They have been called “the fourth generation of those who got rich first” (xian fu qunti). The first three generations are: entrepreneurs - hard working agricultural entrepreneurs in the late 1970s; entrepreneurs in rural townships and village enterprises in the early 1980s; and successful entrepreneurs in speculative activities such as construction and the stock market in the 1990s. The **housing reform** that has been conducted since 1998 is among the important factors for the **formation, stabilization and growth of the middle strata**, specifically the professionals and administrators in the public sector. In China the early access to the privatization of housing became a major factor, one that had a much greater impact on social status than did the level of income. “The privatization of real estate itself becomes a source of socio-spatial differentiation, because through the real-estate market households are able to capitalize properties that were not distributed equally during the socialist period” (Wu and Li 2005).

The emergence of a professional middle class in China has been the result of a **purposeful and ideologically grounded state policy**, leading to perceptible growth in salaries in the public sector and the defence of the social privileges of the publicly employed urban population. This is particularly true of the new middle strata of urban professionals and managers, whose consumption has been stimulated in order to stimulate production, maintain economic growth, and develop the market. While the traditional idea of prosperity in China did not go beyond the possession of “30 mu[^34] of land, a cow, a wife, children and a hot stove” (Hein

[^34]: 30 mu is approximately 2 hectares.
2013, 117), the new slogan “liberation of consumption forces” is leading to changes of consumption patterns and lifestyle.

A policy is being applied whereby “high salaries to foster honesty” are being paid to certain administrative positions in the public administration, the purpose of this being to achieve effective and non-corrupt administrative management. Administrators play a crucial role in the effective functioning of society; that is why stimulating them, as well as professionals, is perceived as a serious investment in the success of the reforms.

This situation shows that after the start of the reforms in China, public administrators, professionals, and experts are in a course of upward economic and social mobility. Their status gives them the capacity of maintaining and increasing their living standard, their social, cultural and economic advantages, as well as transmitting them to the following generations, which are in a considerably better starting position than that of other social strata. Their family members are usually occupied in the urban public sector and have a higher education and qualification level because of their advantages and privileged position in situation of “the growth of the supply of educational opportunities concomitant with the growth of educational inequality” (Li, C. 2003, 76).

The “social engineering” of the state, aimed at raising the consumer status of the middle strata, displays its most tangible results in the state housing policies (Tomba 2004). The state continues to distribute dwellings by subsidizing housing property for certain categories of administrators and professionals occupied in the state sector, whereby it raises their status and makes it more visible.

In China the access to housing in certain neighborhoods is determined not only by income – the market principle, but also by the capacity to overcome administrative obstacles, social-cultural divisions, etc. The research of China’s changing social stratification system has focused almost entirely on the analysis of income, household assets and occupational mobility but some authors have drawn their attention to housing distribution system as a factor with increasing importance to life chances under a market-driven system (Bian and Liu 2005). The inequalities between the so-called “new middle class within the system” (white collar employees in state-owned sector) and those “outside the system” (working in non state-owned sector) “have further increased under the housing reform” (Li, J. and Niu 2003, 19). The new middle class
employed in the state-monopolistic industrial sector with a better economic performance forms the most influential group and the most stable elements of the new middle class in Beijing (ibid.).

The consumption of such important resources, which are in limited supply and, hence, difficult to accede to, is called “positional consumption” (Hirsh 1977) and is strongly dependent on “class position and class situation”. When competing for a limited number of dwellings, what is decisive are not only one’s financial resources (income, security of income and property) but likewise knowledge resources (education, knowledge about the real estate market), political resources (the capacity to make the formal rules in society and take advantage of them), and the social ones, especially membership in certain social networks. This phenomenon has been aptly called “gate under the market transition” (Wu 2005). At present in urban China we can observe a change of forms of “gated communities”, i.e. the transition from danwei (work-unit compounds) to gated commodity housing enclaves. At the time of socialist planning in China the so-called danwei system was imposed: cities were organized into something like cells formed around enterprises, near which the housing of the people working in them are built. Since danwei was the main administrative, production and social unit in cities at that time, the social status of everyone was highly dependent on the resources and status of one’s employer. The distributive institutions traditional for the previous system, for instance work units, have lost their role, their place being occupied by other “agents of the state’s project to ‘create’ a middle class”, for instance state-owned real estate developers and state commercial banks. Dependent on these agents is access to housing and to financial means for buying a home, because they do not function in a purely market environment, i.e. what we have here is social capital at work, the connection between public employment, the state and the achieved status. Those who succeed in preserving a relatively high status position in the public sector are directly or indirectly privileged in their access to the above-mentioned assets and have formed the so-called propertyed class (fangchan jieji).

Within the newly formed middle strata neighborhood communities, are emerging the first middle strata social organizations in post-reform China, whose goals are to protect the rights and interests of inhabitants and owners, to resolve conflicts with investors, etc. (Read 2003). The existence of such organizations shows that residential communities are becoming a center of collective action. There is a noticeable change in lifestyle among these middle strata: instead of being centered mainly on the workplace, their lives are shifting the emphasis to the housing
environment and the respective community of neighbors. The common interests of neighbors in these communities and the need for defending these interests jointly have led to the above-mentioned residents’ grass-roots organizations for handling disputes, which are also the *first informal organizations of the middle strata*, an expression of their *social and civil activeness*.
CHAPTER THREE:

THE JAPANESE MIDDLE STRATA

1. Middle strata in post-war Japan

*Lifestyle and the prestige connected with it, are among the important criteria* by which contemporary Japanese sociology *distinguishes the middle strata* from other stratification groups\(^{35}\).

In Japanese we can recognize three major notions pertaining to the concept of middle class: “middle economic class”, “middle prestigious class”, and “middle strata”\(^{36}\). “Middle economic class” is used to denominate the middle class which some conceptions define as “bourgeoisie”, or as a middle class defined on the basis of owned means of production and economic power. “Middle strata” is used as a concept characterizing the middle class as regards their intermediate position in the stratification space. After 1970s, the sociological concept, equivalent to the understanding of a middle class in western sociology, is “middle prestigious class”, or in Japanese *chuuryuu kaikyuu*, situated between the upper and lower classes\(^{37}\). Since the 1970s in Japan the term *class – kaikyuu – is taken to mean precisely “middle class”*, whereas before the country became a postmodern society the term referred primarily to “working class” due to the latter’s importance for industrial development at that time.

The growing economic well-being after the World War Two brought to the gradually expanding of the middle class in Japan. According to SSM\(^{38}\) surveys the Japanese middle class share, defined on the base of objective criteria, grows from 30% in 1955 to over 50% in 1985 (Seiyama 1993, 26), it share remaining relatively stable during following decades. The share of

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35 See Keliyan 1999, 68-85, 97-103.
37 Ibid, 103-104.
38 Social Stratification and Mobility National Surveys (SSM) are held every 10 years since 1955 and are representative for the Japanese population.
those who self-identify with the middle class in Japan in 1964 reached 90%\(^{39}\). These data differ from those of the SSM survey, according to which 70-75% of the population self-associate with the middle class during the same period, mainly because of differences in the classification categories and schemes used.

There is certain difference between those who believe they belong to the “middle prestigious class”, and the “middle economic class”. The majority of those who identify themselves as belonging to the middle class do so from the view point of prestige, consumption patterns and lifestyle, as well as of their position as a middle stratum in the stratification environment, but not according to their economic resources (Keliyan 1999, 97-103).

The economic prosperity after World War Two and the fact that within two generations Japan turned from a poor country into a rich society, provide the foundations of the myth of “a middle class society”, zealously maintained by political parties and the media.

Similar in this to the US in the 1950s\(^{40}\), in Japan 20 years later there was a state policy of purposeful and methodical support for the development of the new middle strata. They enjoyed high social prestige and received income corresponding to it. In the mid 1950s Japan was an “old middle class society” (Hashimoto 2003, 18)\(^{41}\). The numerical size of this old class sharply declined in the following forty years, while the new middle class nearly doubled in size in the same time. The period of the latter’s most rapid growth as a proportion of the population was in the period between the mid 1950s to the mid 1960s. In the following decade its growth slowed down slightly, but in the mid 1980s it again started to speed up considerably. In the mid 1990s the share of the new middle strata grew to nearly one fourth of the occupied population and has remained at this proportion ever since. One third of these people work for large companies, one fourth, for state institutions, and about 40%, for small and middle firms (ibid. 61).

Calculated by the data cited in the graph 8\(^{42}\), the new middle class\(^{43}\) includes nearly one fourth of all occupied persons (24%), and is a little more numerous than the old middle class\(^{44}\).

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39 Quoted data are from PMO (Prime Minister Office) survey. See Kosaka 1994, 9.
40 Taiwan during 1980s and China during 1990s follow the same policy as Japan.
41 The quoted author has used the findings of an SSM survey conducted in 1995, and re-groups some of the data to fit his class schema. For more details see next page footnotes.
42 This and the following graphs up to Graph 16 inclusively, present data from the SSM 1995 and I built them on the basis of data, presented in Hashimoto 2003, 89. The information from the SSM survey analyzed below is cited from the same source, so Hashimoto designations of social groups are used.
43 It includes professionals, administrators, specialists, officials, and office workers.
(22% of all occupied), but its relative share is two and a half times bigger than that of the capitalist class\(^{45}\) (9%). According to Hashimoto’s schema\(^{46}\) the working class\(^{47}\), with its relative share of 45%, is nearly equal in size to the new and old middle classes put together.

**Graph 8:**

Relative share of different classes
(as proportion of the total working population)

According to the data in Graph 9, the representatives of the new middle class are the youngest: their average age is nearly 42, which is 10 years younger than the average of the old middle class. The members of the latter class, together with those of the capitalist class, are the oldest by average age.

The new middle class has the highest proportion of men and the share of women in it – about one fifth – is the lowest, compared with other classes. More than half of the working class are women (56%), and the proportion of women among the old middle class is about ten

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44 In this class Hashimoto includes leaders and directors of enterprises with a staff of less than five persons, as well as entrepreneurs, self-employed, and family members working for the latter.
45 Falling under this category are leaders and directors of enterprises with a staff of five persons or more, as well as entrepreneurs, self-employed, and family members working for the latter.
46 The criteria this author applies to delimit these four classes are in keeping with his neo-Marxist schema. In Introduction it was made clear that the positions assumed in this research are related to the Neo-Weberian tradition in stratification analysis. A large part of the groups Hashimoto assigns to the capitalist class are entrepreneurs in small and middle business as well as managers, i.e. they belong to the new and old middle. Although Hashimoto’s theoretical arguments are not accepted here, the results of the SSM survey he cites are a good basis for characterizing the lifestyle of the middle class in contemporary Japan.
47 Hashimoto assigns to this class all employed excluding professionals, administrators and officials.
percentage points lower than this (47%). One third of the members of the capitalist class are women. Women are most widely present in lower-status positions, and their proportion is lower in leadership positions within firms. They are present in stable proportions in family businesses, where their role is often that of an unpaid worker.

Graph 9:
Different classes compared by average age, proportion of females, proportion of married and level of education

The highest percentage of married persons is that in the capitalist and old middle class: respectively 90% of the former and 88% of the latter have created a family. More than 80% of the men in the new middle class are married, and only two thirds of the women. The average age of these women is 39, which indicates that a high share of them have preferred their professional career to making a family. According to the data in Graph 9, the new middle class is the most highly educated: more than half its members (52%) have a university education.

The living standard of the members of the new middle class is above the average for the country: their income level as indicated in Graph 10, is the second highest after that of the
capitalist class. The old middle class is in third position, the difference between second and third being negligible. The representatives of the new middle class have a **considerable autonomy in their work**, possess **authority** in their firm, and take part in decision making, especially as regards distribution of work tasks. They have much better possibilities for **growth in their professional career**. Their **social contacts** are usually with professionals, administrators, and managers, which means with people of their own class or of the capitalist class - company directors, etc. (Hashimoto 2003, 110).

**Graph 10:**

Different classes average individual and household income, savings, and average value of real estate (1000 Japanese yen)

Nearly two thirds of the new middle class are **satisfied with their life** (Graph 11), by which indicator they are in the **second highest position**, coming after the capitalist class. Half of the satisfied have specified they are “more or less satisfied”, and one seventh have indicated “satisfied”.
Over one third of the members of the new middle class self-identify as upper or upper-middle class (Graph 12), and 41%, as “middle class” (Graph 13), which once again puts it in second place after the capitalist class. Two thirds of the new middle class are not supporters of any political party: in this it is similar to the working class and differs from the capitalist and old middle class. Nearly half of the people belonging to the latter two classes are not sympathizers of any party but approximately 40% of them are supporters of the Liberal Democratic Party (the share of supporters of this party among capitalists is slightly higher than among old middle class).

The composition of the old middle class at the end of the 20th century was different from that in the middle of the century. Farmers were the main component then but are now a minority; instead, self-employed traders and industrialists make up two thirds of it (ibid. 94). It has the best gender balance, but has the highest average age: nearly one third of its members are over 60 (Graph 9).

Graph 11:
Life satisfaction
The old middle class also proves to be the least educated, and more than one third of its members (36%) have completed only the obligatory educational level, which is the highest share of this level of education among all classes (Graph 9). The average level of household income, as indicated in Graph 10, is equal to that of the new middle class, but their individual income levels are much lower, which shows that the household revenues come from the active participation of family members in the business. Since they are self-employed, they have a high degree of work autonomy and can decide how to organize their work. Most of the people they socialize with belong to their own class or to the new middle and working class. They maintain very good contacts with local administrators, with high-ranking officials from the trade associations, and with politicians, contacts that are necessary and useful for their business.

According to the data contained in Graph 11, by its degree of satisfaction with life, the old middle class is in third highest position, after the capitalist and new middle class (but the difference between it and the new middle is slight).

By status and class self-identification (Graph 12 and 13), the members of the old middle are in a slightly lower position than those of the new middle, but here too the difference between the two groups is small. The old middle class has a much larger percentage of supporters of the Liberal Democratic Party – more than one third of the members of this class, which is twice more than the share of the party’s supporters in the new middle class. Slightly over half its members do not support any political party, which is nearly 15% less than the non-supporters among the new middle.

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48 In Japan the obligatory education is 9 school years, which comprise the full three levels of basic education.
The working class has a low level of education (next to last, with only the old middle class below it) and the lowest income level (Graph 9 and 10). The average household income for this class amounts to two thirds that of the households in the new and old middle classes. Among workers is registered the lowest degree of satisfaction with life (Graph 11). They self-identify as part of the lower and lower-middle class (Graph 12), but more than one fifth of them define themselves as belonging to the middle class (Graph 13). Workers have the lowest degree of autonomy in work, and they are least able to determine the rate of work and the organization at their job. They show the lowest degree of political activeness: three fifths of them indicate they are not supporters of any political party, and one fourth feels that “politics is too complicated for me to understand” (ibid. 93).

What has been said so far allows us to generalize that in Japanese postmodern society the proportion, social role, and importance of the new middle class is growing; it is the class with the fastest and steadiest growth in the last few decades. Were it not for this class, Japanese society would hardly enjoy its present level of “digital prosperity” and would hardly strive for “all-encompassing communication nets” and ubiquitous information technologies. The relatively young age of its members, its high educational level and income level, the ample social contacts
of its members, its high degree of satisfaction with life, and its class and status self-identification, have made it the *bearer of the latest trends in consumption and lifestyle.*

**Graph 13:**

**Class self-identification**

![Class self-identification graph](image)

Unlike the *new middle*, the *old middle class* is more conservative, as its members are older, less educated, more connected with other household members in the framework of the family business. The tendencies in the post-war stratification structure of Japanese society have determined the *stratification in the consumption patterns of the various classes*, as well as the *growing internal class differences within the middle class itself.*

2. **Middle classes consumption and leisure patterns**

The *new middle class* is in *third position* as regards the average amount of its possession of consumer durables, house ownership and financial assets, and by this criterion seems nearer to the working class than to the old middle and capitalist classes (Graphs 14, 15 and 16). The situation of this class is similar as regards the *rate of house ownership*; nearly two
thirds of its members, which is almost as much as in the working class, live in a home of their own (Graph 14).

**Graph 14:**
Rate of house ownership

![Graph showing rate of house ownership for different classes](image)

The data show that *this class has the highest share of members* – nearly one tenth, as shown in Graph 14 – who *live in company-owned dwellings*. This fact is indicative of the *advantages* provided by the status of “people belonging to the organization”. The *new middle class is in second place, below the capitalist*, with regard to *consumer durables ownership*, as evident in Graph 15.
Graph 15:
Consumer durables ownership (part one)

This trend is especially clear with respect to the rate of ownership of a computer and piano, a criterion by which the new middle follows consumption patterns very similar to those of the capitalist class and quite different from those of the old middle and working class (the latter two prove to have approximately equal percentages of owners of these two items). Because of its higher educational level, the new middle class invests in objects related to high technology and culture. The percentage of people possessing a computer and piano is indicative of what this class would prefer to invest its money in, and of its interests and occupations in leisure – these are connected with high culture. This class is in second place with respect to the level of the individual salary but in third place with regard to house ownership (Graph 14). Its members can rely on “the organization they belong to” so they do not feel they must buy property as an eventual source of income should the need for this arise. The new middle class prefers to spend its money on consumer durables and leisure activities, due to its higher educational level and more developed esthetical taste.
According to the criteria “rates of consumer durables ownership, house ownership and financial assets” the old middle class is in second place, following the capitalist class (Graphs 14, 15). By the indicator “rate of house ownership” it is even in first place, ahead of the capitalist class (Graph 14). Most of its members are self-employed and they want to be able to rely on this property in case of need. By investing in a home, in real estate and movable property and savings, they are providing for their family members actively engaged in the family business. By the rate of consumer durable ownership (Graph 15), the old middle class is in third place, following the capitalist and new middle class, but is in second place after the capitalist class by the criterion sport club membership and ownership of art objects and antiques (Graph 16).

The capitalist class is oriented above all to objects and property of high value and prestige. It has the highest percentage of owners of a home plus a country house (Graph 14). In Japan the possession of a country house is something rare, for three reasons: the high price of dwellings; the high tax rates on buildings, which grow in geometric progression for every following dwelling owned; the small amount of leisure time they have in which to go to a country house even if they had one. The people belonging to the capitalist class and possessing a country house are four times as many as those in the new and old middle class. Also, the
The working class has a similar level with regard to house ownership as the new middle class (Graph 14), but has the lowest level of consumer durables ownership (Graph 15 and 16).

The leisure patterns of the four classes differ considerably from one another (ibid. 105-107). Of all four classes, the most active one during leisure time is the new middle class. This shows it has a lifestyle in which leisure holds a special place. The highest relative share of people performing activities such as reading sports newspapers, women’s weekly magazines, fiction and history books, and of karaoke users, are in the new middle – 80% for each of these activities. Members of the new middle class are the most frequent visitors of art exhibitions and museums – about 70% of all members. The same proportion of it takes part in costly recreation activities such as golf, skiing, and tennis, while 40% go to concerts of classical music. It has the same percentages for these two indicators as the capitalist class, even though the latter has higher income. This confirms that the new middle have a leading place in activities requiring high esthetical taste and education.

Professionals and managers, though they respectively amount to 7% and almost 12% of respondents, represent more than one fifth of the group with the highest level of “information literacy” (ibid. 208). The latter dimension has a strong influence on the consumption patterns and lifestyle of the various social strata in Japan, and modifies them to a considerable extent. The groups differentiated on the basis of information literacy represent separate consumer groups with specific lifestyles. The social differences between groups distinguished by their various skills in using the information media are closely linked to differences based on the use of traditional media. As may be expected, the groups with the highest level of “information literacy” are also the most active users of Internet: nearly 90% of them are regular users. Two thirds of them read literary fiction and specialized literature in their spare time, nearly 80% read
magazines and comics, and more than half go to the theatre and movies. By comparison, in the group with the lowest level of “information literacy” only 3% use the Internet, 12% read fiction and specialized literature, and one third read comics and magazines, and one fourth go to movies and the theatre.

Unlike the new middle class, the members of the old middle class are not very active in their leisure time. Their leisure patterns are the most passive, i.e. with regard to the listed activities they are least active of all classes, even less than the working class. Unlike the new middle class, they do not belong to an institution to which they must be loyal and on which they can rely. This limits their leisure time and orients them above all to so-called social activities – in these they are the most active class next to the capitalist. Taking part in various social activities are 40% of the old middle class and nearly half the capitalist class. For the old middle these activities are useful for creating and maintaining useful connections with members of local government, with politicians, with members of trade and industrial associations, with business partners, etc. The leisure time of the old middle is not as distinctly separate from their working time as that of the new middle class.

Despite differences in leisure patterns between the different classes, there are evident similarities in their preference for two activities: reading sports newspapers and women’s magazines, and for karaoke. People attending classical music concerts are the smallest share in all classes. The explanation for this may be that this activity requires specific taste, knowledge and feeling for the music; also, tickets for such concerts are expensive. Still, about 15% of the old middle class and even 20% of the working class go to classical music concerts. This fact confirms how important high culture is for the Japanese and the impact of the education of taste in school.

The working class is the most active in playing pachinko (pinball machines): more than half its members do this in their leisure. Next in order by this activity are members of the capitalist class and the new middle class, with about 45% each, while old middle class has less than 40% of its members who share in this recreation.

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49 Including activities in the local community, in various neighborhood clubs, in volunteer organizations, etc.
3. Postmodern middle class consumers

Immediately after World War Two, Japanese consumption was characterized by poverty, shortage of commodities, a growing black market and smuggling. Since the mid 1950s the country began to restore its economy; the emblematic commodities of consumption at that time were the washing machine, the refrigerator, and the vacuum cleaner; by the mid 1960s these items were indeed found in every home. When Japan achieved the level of second strongest economy in the world in the late 1960s, shopping had come to be considered something patriotic. All this radically changed the nature of Japanese consumer society, which underwent a “transition from quantitative to qualitative consumption” (Skov and Moeran 1995, 28).

It became important and at last possible for middle strata consumers to display their grown living standard by the use of prestigious brands of commodities and services. At that time there began a development and gradual growth of conspicuous consumption, which attained a mass scale and characterized Japanese consumer society throughout the 1980s.

In the 1970s Japan was a leader in the development of the so-called “fifth generation” computer systems and robotization. By the mid-1980s the country had achieved its goal and turned into an information society. Typically, Japan emphasizes foremost the social values of the media, communications, and information technologies, and their use not only in the sphere of production but also in leisure, recreation, and consumption. Since then high technologies have found a permanent place in Japanese consumption patterns, especially those of the new middle strata. They have become a characteristic feature of the Japanese consumer society and lifestyle in general. Japan has practically realized its post-war ideal, and is a real example of the post-industrial society described by Daniel Bell. Japan has become a society oriented mostly to information and services, and its industry is based on the development of science and technology, particularly modern technologies. Japanese products symbolize high quality, and the country has a well-established image as the land of high technologies.

In 1985, in the city of Tsukuba, Ibaraki prefecture, north of Tokyo, the International Science Technology Exposition - Expo ’85 was held. It popularized Japanese achievements and confirmed the status of the country as a world power in the field of science and technology. Advocated amongst the public and the media was the idea that information is of paramount
importance for achieving and leading a “meaningful life”; especially receptive to this message were the new middle strata. Knowledge-related professions have enhanced their influence, and this has changed the stratification structure of society and the place of the new middle class in that structure.

According to Imada (1998), Japan passed from the stage of “consumer society” in the 1960s and 1970s, to that of a *yutakana shakai* or “affluent society” in the 1980s. He uses this term to characterize the changes taking place in postmodern Japanese society. Due to these changes, the *status differences between people and groups* were now defined not only and not mostly by the material dimensions of their social situation but *increasingly by their consumption patterns and lifestyle*.

The increasing number of white-collar workers in the Japanese economy at that time was a factor leading to the development of mass society and mass consumption. In the 1960s and 70s, the growth and stabilization of the middle class became the goal of the ruling elites, and also the model of material success at the individual and social level. The increasing number of white-collar workers in the Japanese economy at that time was a factor leading to the development of mass society and mass consumption, which in turn promoted the myth that Japan was a “middle class society”. The political party platforms at that time were elaborated in this direction. These changes led to the emergence of another myth, according to which the country was turning, during the 1970s, from a middle class society into a “new middle mass society” (Murakami 1984). The new middle mass is understood to be a mass middle stratum, homogenous in respect to lifestyle, consumption patterns, and value system. This massification was due to the increased proportion of the new middle class of professionals, experts, and managers.

Starting from the 1980s, Japan turned from a “society of the middle mass” into a “divided middle mass” society. The “divided middle mass” has consumption patterns and lifestyle that do not directly result from its achieved status, i.e. from the profession, income, and education of its members, unlike the “middle mass society” (Imada 1998). “Divided middle mass” consists of differing social strata whose lifestyle is centered on the values of a good family, satisfaction derived from personal life and leisure, from the display of personal qualities, ample social contacts, possibilities for exercising leadership, and self-expression in informal relations. The concept of “divided middle mass” is used to characterize the middle class in postmodern
societies like the Japanese one, in which values are reoriented from the achievement of material status to greater spiritual self-expression.

In reality, after World War Two the share of the middle class, especially that of the new middle strata, did increase, but Japan was never a “middle class society”, much less a “new middle mass society” (Keliyan 2012a, 95-101). Starting from the mid-1960s, the lifestyle, consumption patterns, and cultural patterns certainly did become factors of growing importance for stratification, but this does not mean that economic criteria had lost their impact. Past inequalities have intensified since the 1980s, and done so not only in the direction of growing differences in values, leisure, and cultural status. Under the impact of the “bubble economy”, the prices of real estate and land grew several times higher, thus engendering considerable inequalities between those who had these resources and those who did not (Hashimoto 2003). The “new rich” and “new poor” emerged: the former have the resources for leading an affluent and even lavish lifestyle, which the latter cannot afford even when they are employed and with an income above the poverty line. In studying the financial resources and capacity for savings of the households, Ozawa states that society is entering an “era of neo-stratification consumption”, brought about by the “birth of the divided masses” (1995). Similar conclusions are presented by Yamazaki, who writes about “the emergence of fragile individualism” of “masses divided with regard to consumption and lifestyle” (Yamazaki 1984), while Fujioka entitled his article about these trends with the nostalgic phrase “Goodbye, masses” (1984). According to some authors till 1980s Japan developed as “all-middle-class society” but after that it has become unequal with sharp rising of social inequality (Tachibanaki 1998). Using empirical evidence about household income inequality, measured by Gini coefficient for the period of several decades, starting from 1980s, Shirahase concludes that trends of growing income inequality is evident during that period and “Japan was not a country of such equality as people imagine” (Shirahase 2014, 23).

Other authors define that in the 1980s and early 1990s Japanese society entered a period of “post-scarcity” (Tamura 2007). The greater part of the population had by then no problems satisfying its basic needs, and could even afford to consume luxury goods (Bookchin 1971). The contrast between the deprivations of the post-war years and the subsequent plenty was quite sharp and this change took place within a single generation. At that time the new stratifying role

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of consumption in Japanese society became increasingly distinct – by then society had achieved the material-economic freedom for such consumption.

There were indisputable differences between the status positions of the different social strata in Japan during this period. The question is not whether differences existed or whether they grew or decreased – the important point is that in a postmodern Japanese society, consumption patterns and lifestyle, together with economic situation, are a significant, in fact key factor defining the status positions of the separate socio-professional groups. The views of various authors quoted above confirm this important finding: the ways and forms, in which the separate groups and strata consume, become increasingly differentiated and this testifies to the status differences between these groups. Research interest is focused primarily on what is happening in the middle strata: analyzed are the differences within them engendered by the specific consumption patterns of the separate socio-professional groups. The processes occurring in these consumption patterns have shaped the main trends in the social stratification of post-war Japan and show the significance of the middle strata as bearers of the most important, symptomatic and emblematic changes in society.

Since the mid-1980s Japanese postmodern consumer society entered a stage in which the stress shifted from conformism of the “consumer masses” to an individualism influenced by Western values. Consumer groups, in their striving to express most fully that they are “different”, have become increasingly segmented (Schutte and Ciarlante 1998, 103, Creighton 1998, 219). Consumer culture in this period was dominated by the values of individualism and self-expression, which sought adequate projection in the lifestyle. The educated new middle strata of the so-called “new middle mass” - shin chukan taishu (Murakami 1984, Imada 1998) are the suitable target group of consumers with the necessary income but also with the cultural potential to adopt the ideas of “diversified” consumption patterns and lifestyle.

In the 1990s the Japanese postmodern consumer society underwent changes in values: the preference shifted to simple and functional products, in which the most important aspect was utility, not design and brand. These values have been shared especially by the new middle strata, who express the ideas of globalism, pragmatism, and the “new refinement of taste”. These processes are stimulated by economic recession, which makes the cheaper stores not only increasingly popular, but even “in vogue” among certain social groups of consumers (Keliyan 2012a).
4. Ecological lifestyle and ubiquitous digitalization

An important trend in Japan, and particularly popular among wide circles of the population, is the ecologically oriented consumption and lifestyle that are characteristic of postmodern societies. The morally “responsible”, “sustainable”, and “green” lifestyles are part of the agenda of Japanese civil society, which is increasingly mindful of preserving ecological balance\(^{51}\). People began to increasingly attach importance to the ecological lifestyle as early as the mid 1960s but at that time the trend was mostly rooted in the middle and especially new middle strata. By the beginning of the 21\(^{\text{st}}\) century ecological consumption and lifestyle have become a goal for all who wish to be perceived as “enlightened modern consumers”\(^{52}\). The media – both printed and electronic – have played an important role for popularizing these lifestyles, and in complying with state policy, they conduct active educational campaigns in this connection. The aim is for consumers from all social strata to be informed about the norms and requirements for a healthy lifestyle so that the latter might become a widespread practice. Certainly the leaders in this respect are the middle strata, especially the social-professional groups of the new middle strata; the other social-structural groups are in various degrees followers of the consumption patterns of the middle strata.

By the beginning of the 21\(^{\text{st}}\) century Japanese society had become an increasingly “recycling” society: in 2001 the Law on Food Recycling was passed, which obliges hotels, restaurants, supermarkets, etc., to recycle their food waste. The motto of environmental lifestyle (the so called 3Rs) is: “reduce, reuse, recycle”. Leftover food is reprocessed and the organic manure thereby obtained is used for growing ecological vegetables and rice, thereby closing the food chain. Separate garbage collection, with even highly detailed separation, began to be practiced in Japan back in the 1990s, and is considered very important in this country. Increasingly strict requirements for separation of categories of garbage are being introduced each year.

\(^{51}\) About ecological problems in contemporary Bulgaria see Mantarova 2015.
\(^{52}\) As a result of increasing popularity of “environmentally and morally responsible lifestyle” in Japan, brands with high environmental evaluations are growing. For its efforts to increase emphasis on protecting the environment, Toyota Motor Corporation was awarded with the first place in the “Best Global Green Brands” rankings for 2010. Other Japanese companies ranked in the top 10 were Honda Motor Corporation, which placed seventh, and Panasonic Corporation, which ranked 10th.
In January 2001 the Basic Act for Establishing a Sound Material-Cycle Society was brought into force. This law has established a legal framework to address issues such as waste disposal and automobile and electrical appliance recycling. Other ongoing efforts include better waste management, and research and development for the use of waste as a source of energy, with a view to generating a synergy between efforts to manage waste and tackle global warming. Thanks to this development, the volume of final disposal (to be put into landfills) of waste generated as a result of business activities, fell from 89.73 million tons in fiscal 1990 to 16.70 million tons in fiscal 2008. Meanwhile, the recycling rate of "nonindustrial waste" (household waste and also shop, office and restaurant waste) in fiscal 2008 was 20.3%. Both the total volume of recycled waste and the recycling rate have been rising every year (Statistical Handbook of Japan for 2011, 2012, 163-164).

Since the beginning of the 21st century more and more efforts are being made for increasing greenery in the megapolises. Most large construction enterprises are offering green roofs on their buildings: these are spaces with grass, bushes, flowers, and even trees. The aim is for these plants to absorb the heat and purify the waste gases in the “concrete jungles”, thereby reducing the greenhouse effect that has led to an increase of several degrees in average temperatures in large cities. Some home furnishing companies make and sell such furnishings not only for residential buildings and various high-rise buildings, but also for one-family houses. This roof greenery is expected to improve the appearance of cities and also to provide a place for recreation for inhabitants, to improve the insulation of buildings, to decrease heating expenses in winter and cooling expenses in summer, to decrease noise and contribute to the fight against global warming. Gardening is among the favorite traditional hobbies of the Japanese, but with urbanization fewer people today can indulge in it. But now the new technologies are making this possible, in happy combination with Japanese society’s striving for a natural lifestyle and for preservation of ecological balance.

The middle strata are leading this trend. On one hand, people from this class, such as professionals, experts, managers, entrepreneurs, are among those who observe ecological norms and requirements. On the other hand, their social-group position and resources enable them to popularize and take part at various levels in spreading the values of ecological culture throughout society.
Tokyo was the first megapolis to introduce the requirement of planting greenery upon at least one fifth of the surface area of the roofs of newly constructed buildings – this was in April 2001. Since then, the Ministry of Land, Infrastructure and Transport has developed and implemented a program for reducing taxes of people with “green roofs”, as well as VAT for “green roof equipment”. The local authorities in other large cities, such as Osaka, Sendai, Kanazawa, etc., are also taking measures for financial incitements for such green areas.

Contemporary Japanese consumption patterns are characterized by their high tech orientation and nature. The country has succeeded in maintaining the image of a society that has achieved digital affluence, due to the leading role in it of digital media and communications and their ubiquitous presence in all spheres of life (Ito et al. 2005). Becoming a postmodern society, Japan entered the “information age”, and the country’s economic priorities were reoriented from the production of physical products to information technologies. The Japanese “cult of high quality”, the Shinto tradition of renewal, and the “will to innovation” (Dore 1973) are some of the factors stimulating the application of modern technology in everyday life.

Computer technologies started penetrating Japanese society in the mid 1970s, in the form of various video games and “home play stations”. This changed the consumption and leisure patterns of various social groups, categories, and strata. The use of information media, the so-called information literacy, has become an increasingly important resource for achieving high social status (Hashimoto 2003, 208). In postmodern society this quality is as important as the ability to read, write and do sums was in modern society. The differences in the level of digital culture are related to differences in status, stratum, and class; according to some authors, the development of information technologies even tends to enhance the already existing class inequalities. The expectations of Japanese sociologists are that these trends will continue with even greater intensity in the future. The middle strata are leaders in digital culture, and the greatest level of information literacy is registered among them.

Japan is a society increasingly dominated by digital media and communications. For Japanese consumption society what is important is not only the use of IT and their further development, but for the country to be a leader in innovation in the IT sphere and in the quality of related services offered. In 2001 the biggest mobile operator in Japan – NTT DoCoMo was the first in the world to introduce third generation mobile phones. Since the beginning of 2005
the government has been applying a policy known as “u-Japan policy”, an abbreviation designating its objective – the building of a “ubiquitous communications network society”. The goal is for Japan to become the world leader in ICT. The commodities offered in this sphere are constantly being varied and renewed; new, better-quality, higher tech products are supplied, and this market is exceptionally dynamic. Japanese influence and leadership in the area of postmodern consumption culture and lifestyle has even become not only a source of economic recovery and strengthening but also one of the sources of its contemporary soft power. It is no coincidence that to foster industries the Ministry of Economy, Trade and Industry (METI) created the concept of “Cool Japan”. According to part 2. Summary of the report of the Proposal of the Public-Private Expert Panel on Creative Industries, “The Panel focused on overseas expansion strategies mainly for six sectors in the first half of the term: (1) apparel and fashion, (2) monodzukuri and regional products, (3) food, (4) content, (5) tourism and (6) home. In later half, discussions were held in greater depth on Japan’s fundamental sense of values and sense of beauty, including the basic notions and lifestyles constituting the Cool Japan concept.” In other words, the most important aspects of this strategy are famous Japanese products and practices, consumption and lifestyle values, and attitudes.

5. Middle class anxiety in the late 20th and first decade of 21st century

The middle class, both old and new, was protected on the labor market up until the late 1990s. The new middle strata benefited by the system of life-long employment, and the salaries of people in this group were set according to length of service and age. The old middle strata were protected through the existing regulations on the activity of large corporations, rules that alleviated the competition pressure on the self-employed and small entrepreneurs. However, at the end of the 1990s there was a reevaluation of the existing economic order. Since the second half of the 1990s Japanese society, as part of the increasingly global world economy, has been undergoing recessions and crises, followed by periods of recovery. The first crisis of this kind

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53 The goals, tasks and measures were widely discussed in public space throughout the year 2004.  
was in 1997, and the earliest signs of recovery were seen in 1999. The second crisis came in 2008; the economy began to revive slowly from it in the middle of 2009, but the disasters of March 11, 2011 led to a new crisis.

As a result of the social-economic and structural transformations in the country and the world, important changes can be seen in the consumption patterns and lifestyle of various social strata in Japan. In the Japanese media there appeared indicative expressions such as *kachigumi* (the group of the successful) and *makegumi* (the group of losers). These terms are a sign of the increasingly perceptible social-economic changes that are depriving Japanese society of its past aura of a homogenous middle class, and ending the myth about Japan as a “middle class society”.

The issue of growing economic inequality is being raised with increased emphasis in Japan, together with that of the “working poor” among the low-educated social strata and part-time employees (Tachibanaki 1998, 2005, 2006); it is regarding these problems that the discussion among the academic community and the general public first began about the on-going structural processes and their disturbing social consequences. There is an increasingly clear understanding in Japan and the world about the “end” of Japanese prosperity, about the “exhausted” potential of the country, and its “obsolete model”. Public discussion is going on about the need for a change of the “economic model”, of the economic culture, and even of the value system. The traditional features of Japanese morality, such as harmonious relations and avoidance of conflicts, are pointed to as the primary cause of the “crisis of the model”, because they may inhibit creativity and lead to the toleration of corruption. Such views have been held in the past by Western and Japanese researchers. The difference now is that these views are increasingly popular with the public and the media of Japan.

At the turn of the 20th century the growing income inequality in Japanese society made it be defined through key phrases popularized by the media, such as *kibou kakusa shakai*55 (the hope disparity society) and *karyu shakai*56 (lower-class society). Two contrary trends are emerging in the consumption patterns of the various social strata. On one hand there is a distinct group of upper strata demonstrating their affluent consumption. On the other hand there is an increasing share of people who must restrict their consumption because of their lower income. The academic world and media discuss poverty, and even the existence of working poor, as a

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56 A concept introduced by Miura Atsushi (2005).
considerable social problem. These two contrary trends in social stratification have determined the “boom” of stores and consumption centers meeting the different needs of these social groups: there are expensive stores offering luxury items and services, and there are stores offering cheap and “recycled” commodities. Together with this, the representatives of the new middle strata have a stable, though relatively slowly rising, income. The various kinds of stores and centers for consumption and recreation are offering increasingly varied products in order to meet the needs and demands of the consumers belonging to these different strata.

All these changes have an impact on the myth-making process in Japan: they tend to destroy the myth about the country as a “middle class society”. But how significant is this impact specifically on the class self-definition of the Japanese?

The results of a number of sociological surveys indicate that since the 1970s and until now the proportion of the subjective middle class, i.e. of those who consider themselves to be middle class, has remained stable. This is confirmed by SSM and by other surveys, for instance the Public Opinion on National Life survey, conducted by the Cabinet Office research center. According to its findings, approximately 90% of the Japanese define themselves as middle class; within this category, about 10% believe they are upper-middle class, less than 60% indicate they are middle-middle class, and about one fifth, lower-middle class (Annual Report on The Japanese Economy and Public Finance 200657).

The representative panel studies that have been conducted by the Nomura Research Institute (NRI) every three years since 1997, encompassing over 10 000 respondents, have made it possible to outline the dimensions of the class self-identification in Japan since the late 1990s and until 2010. The interviewed persons were asked to assign themselves to some of the indicated classes on the basis of what they assessed to be their living standard. For the whole nine-year period from 1997 to 2006, the share of people who defined themselves as middle class, i.e. all those who placed themselves in one of the middle class groups - lower-middle, middle-middle, or upper-middle, decreased by 6% (Nitto 2008, 3). There was respectively a slight increase of those who assigned themselves to the lower class and to the lower-middle class, at the expense of the decreased share of people identifying as upper-middle or upper class. But the changes are two small to allow the assertion that the class self-identification of the Japanese during this period has changed significantly. The results of the survey conducted in July 2009

57 See http://www5.cao.go.jp/zenbun/wp-e/wp-je06/06-00303.html
show that the average income of Japanese households had not changed by then compared with 2006 (Ishihara 2010, 658). The proportion of those defining themselves as lower-middle and lower classes decreased by 7%, while those identifying as upper and upper-middle classes grew by 6%. Ultimately, on the basis of NRI survey findings, it can be asserted there is a slight change in self-identification with the upper-middle class (rising from 7% to 8.5%) and with the lower-middle class (rising from 28% to 30%), but the share of those identifying with the middle class in general is relatively constant: between 85% and 90% of the respondents assess that, according to their living standard, they fall in this category.

Overall, the changes occurring throughout the entire period since the 1970s until today in the class self-identification of the Japanese on the basis of living standard have been inconsiderable and do not justify the claim about a “disappearing” or “melting” middle class. What then are the reasons for the demise of the “middle class society” myth and the appearance of the myth of the “vanishing middle class”?

Prevalent in Japanese society are egalitarian values; this is a communitarian society with a developed group culture. Which makes it very sensitive to the growing inequalities in income, education level, consumption, and lifestyle. The increased proportion of part-time employees, of employed women, the end of the life-long employment system, have radically changed the labor market of Japan. The rapid aging of the population is a serious problem for social insurance, while the unwillingness of young people to create families of their own, and the decreasing number of children born, engender insecurity about the future. The periodic global recessions and crises in the end of the 20th century and the first decade of the 21st are a serious challenge for the economy, while the rapid economic growth of China has ousted Japan from the position it held for half a century as the second strongest world economy. The Japanese know perfectly well that the ranking of world economies according to their nominal GDP does not give a realistic picture of the actual development of a society, and that, for instance, quality of life is a much better indicator. But this is certainly no consolation, for obviously their economy is finding it increasingly hard to deal with the contemporary global challenges. The political elites have proven powerless to find a solution to the problems of society, and the country has had a series of quickly changing governments.

The social-economic and structural changes in Japanese society since the end of the 1990s have led to:

1. A decreasing share of people working on permanent work contract and an increasing share of part-time workers. Some of them are known as furita (a combination of the English term free time and the arubaito, the Japanese variant of the German word arbeit).

2. The increasing inequality of income between people with high education level and skills, and the others.

3. Two opposed tendencies in consumption patterns are emerging. On the one hand there are the upper strata with their display of conspicuous consumption; on the other there is the growing share of people who are limiting their consumption.

4. At the same time the representatives of the new middle strata have stable, though rather slowly-growing incomes.

5. The share of employed women has been increasing constantly in the last decades.

6. The demographic trends of population aging are having an impact on producers and on various categories of consumer and lifestyle centers.

The changes in postmodern Japanese society since the beginning of 21st century have led to new “differentiation”, “specialization”, and “regioning” in Japanese consumer society. The new trends in social structuring and the economic upward trend are leading to a growing variety of stores, centers, streets, neighborhoods, and even “towns” for shopping, services and entertainment, a variety in terms of their orientation, consumer policy, and market position. The leading tendency in contemporary Japanese consumption patterns is their growing diversification. A visible sign of this process are the increasingly distinct differences and stratification of stores and the different kinds of shopping and consumption centers. The survival of the latter depends on their ability to find their own target groups of consumers by keeping up the balance between quality and prices of goods and services on one hand, and the requirements of social status of consumers, on the other.
6. Fukushima: Japan facing nuclear disaster

The natural disasters and the ensuing nuclear crisis in Japan, known as the triple March 11, 2011 tragedy, have placed on the agenda of developed and developing countries alike the issue of nuclear power plant safety, but likewise the more general question of the value of an ecological consumption and lifestyle. Japan has a developed and functioning policy for environmental protection and functioning laws for the application of that policy. But despite the achieved results, many problems still exist, provoking the criticism and protests of civic movements. The country’s tragic experience with the atom bombs over Hiroshima and Nagasaki, and the popularity and importance of the ecological consumption and lifestyle, are circumstances that make the tragedy even harder to explain and come to terms with. This is a country that has undergone the nightmare of atomic bombing and is particularly sensitive in its mentality and culture to the risks of nuclear energy, till March 2011 obtained one third of its electricity precisely from nuclear power stations. To make matters worse, one fifth of the earthquakes taking place in the world occur on its territory, and are often followed by tsunami waves. In this country earthquakes are part of daily life. Yet the ecological consumption and lifestyle are not a distant goal for Japan, they are the actual practice of large groups and strata of the population. The public is informed, concerned, and sensitive about natural environment protection.

But this is not only a Japanese problem; it is one of the most important issues facing all countries in the world today. The development of technology, of the IT sector in particular, has given rise to the dangerously illusory idea that nature and man-made technology are under control, and that what has not taken place during the past decades will not take place in the future. In a number of countries, among them Japan, a serious additional cause for the extent of damages coming from the destructive power of nature, is human error. The latter is often linked with economic interests, and with corrupt practices tying political elites to economic structures: data indicating this connection were presented and discussed after the Fukushima nuclear incident.

The nuclear crisis in Fukushima has its global impact: it is shaping how nuclear energy is perceived globally - both by countries with nuclear power plants as well as those considering the role of nuclear power in their own infrastructure planning. The devastation has shown how
vulnerable a highly developed technological society can be, for all its conviction that it can meet
the challenges of natural disasters. These events brought about, albeit in a tragic way, a clear
awareness of the importance of the ecological consumption and lifestyle for the quality of life in
general. In the global world of today it has become urgent and unavoidable to rethink the
predominance of economic and political priorities over the ecological ones on which our
existence ultimately depends.

The Fukushima nuclear crisis brought about the demise of the blind faith in the
infallibility of technology, of nuclear power technology in particular, the faith that people are
capable of fully managing it and subordinating it to their goals and will. This naïve and risky
belief is related to the priority assigned to efficiency and comfort in the modern world, values
that are mythologized at the expense of security, of moral responsibility for preserving the
natural environment and human health and life. At first glance the middle class consumption
patterns and nuclear power safety are not interconnected issues. But they both are linked to the
post-modernization of contemporary societies.

The March 11, 2011 tragedy, according to the moving words of Japanese writer Haruki
Murakami “The situation marked the collapse of the myth regarding Japan’s technological
prowess, of which the Japanese people had been so proud59”.

The catastrophic events changed the agenda, goals, values, and priorities of Japanese
society, as they did the agenda of the whole world, even though not all societies may be aware of
the change. The myth of the safety of nuclear energy is part of the myth about the ability of
people to control technologies effectively and with entirely beneficial results. Both myths are
connected with that of the predominant importance of efficiency and comfort in the post-modern
consumption patterns and lifestyle. The creation and spread of these myths has occurred in
parallel with the myth about Japan as a “middle class society”, and this is no coincidence. The
speedy and successful post-war development of the country, which turned it into a post-modern
society, also created favorable social, economic, political, and cultural conditions for this kind of
social mythology. Since the late 1960s, as a result of the post-modernization of Japanese society

59 See Haruki Murakami’s acceptance speech titled “Speaking as an Unrealistic Dreamer” on
receiving the Catalunya International Prize, The Asia-Pacific Journal, Vol. 9, Issue 29, No 7, July 18, 2011 -
(Keliyan 2010, 35-42), the myth was established regarding the importance of efficiency and comfort, which have become priority goals in the country’s economic development. Economic production and developing technologies are expected above all to be efficient and provide comfort for consumers, especially for raising and demanding middle class consumers.

At that time the myth became established in the country that technologies can be fully controlled by Man and society; and Japan seemed to be among the world leaders with regard to the efficiency of this control. But with the great stress on the values of efficiency and comfort, the issues of safety, security and environment protection somehow remained in the margin of public attention.

In 2010 the government plan for power production envisaged an increase in the share of electricity produced by nuclear power plants from 30% to 53%. The crisis in the Fukushima nuclear power plant put an end to such plans. Now widely discussed in the media and in public space are revelations about the corrupt practices in the energy sector, about the suspiciously close relationships between high-ranking civil servants from the nuclear power sector and state officials responsible for overseeing the safety of nuclear power plants, about irregular activities in support of nuclear energy not only on the part of the nuclear lobby but even of certain representatives of the Nuclear and Industrial Safety Agency (NISA). Dismissals and resignations followed, as well as civic protests and appeals for altogether abandoning the use of nuclear power.

The tragic events led to a rethinking of the myth of safe nuclear energy, of effective control over technologies, of the priority of efficiency and comfort over safety. But this has come at a very heavy price, an “unbearable” one: the country finds itself in a similar situation as in the last days of World War Two, when, in the words of the emperor Hirohito in his radio speech declaring capitulation, Japan had “to bear the unbearable”.
CHAPTER FOUR:

THE MIDDLE STRATA IN BULGARIA

1. Social-group boundaries of the middle strata in contemporary Bulgaria

The Bulgarian middle strata, i.e. those who possess the “typical characteristics of middle strata” are calculated as being between 20% and 30% of the population, while about 42% of the people identify themselves as falling in this group. Their share varies within this range according to the classification models used by different researchers and by the size of the sample used in representative surveys. Many national representative studies, such as European Social Survey (ESS) and International Social Survey Program (ISSP), have shown that since the beginning of the 21st century the relative share of objective and subjective middle class has remained the same and falls within this range. A phenomenon familiar in developed countries and described in previous chapters is observed in Bulgaria as well: consumption pattern and lifestyle of the middle strata are acknowledged and desired even by people who, assessed by objective traits, do not belong to them.

The distribution of the different middle strata in present-day Bulgarian society by objective indicators can be traced through the cited data in Table 7.

The stratum of intelligentsia and intellectuals comprises professionals, experts, specialists, administrators and managers with a higher education and special qualification, people of the artistic-creative intelligentsia and other similar categories. In studying the part of this stratum that belongs to the middle strata, researchers exclude those occupying high leadership positions. The members of the intelligentsia comprised in the Bulgarian new middle strata may be people employed in state or private institutions or working in their own firms. The data show

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that in 2000, 95% of this category was with a higher education. Their relative share in 2006, according to the data in Table 7, amounted to about 8%; the percentage varies in different representative survey according to the size of the sample and the classification used, and ranges between 7% and 12% of the adult population of Bulgaria.

The specific stratum of contemporary Bulgarian intelligentsia whose Western counterpart are professionals, differs considerably by its status characteristics from professionals in developed societies. In our country after 1989 the middle class primarily has the image of a class of entrepreneurs, businesspersons and self-employed. Obviously in a changing society of the Bulgarian type, the resource of material wealth, associated with entrepreneurs, is much more prestigious than that of knowledge. In developed societies the educational and qualification background of professionals is assessed and used as an important resource for obtaining and preserving general social prosperity. In the modern world, the demand for “educational achievements spirals upward”, a phenomenon designated as positionality\textsuperscript{61}. Positionality carries prestige but also high income for the highly-educated and highly-qualified social groups that make possible, with their knowledge, skills, and experience, the creation and growth of the economy of knowledge and high technologies. Incomes of the members of the intelligentsia in our country are around and above the average for the country, but are lower than those of entrepreneurs, qualified workers, and technicians, and even of some categories of unskilled workers.

\textsuperscript{61} Hirsh 1977.
### Table 7: Social Strata in Bulgaria

<table>
<thead>
<tr>
<th>Social groups – Social strata</th>
<th>1999</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. High level state officials/administrators/managers</td>
<td>1.1</td>
<td>3.4</td>
</tr>
<tr>
<td>2. Professionals, non-top administrators and managers, experts</td>
<td>8.7</td>
<td>8.1</td>
</tr>
<tr>
<td>3. Routine non-manual employees</td>
<td>12.1</td>
<td>12.3</td>
</tr>
<tr>
<td>4. Small and medium sized entrepreneurs and self-employed farmers</td>
<td>5.2</td>
<td>2.9</td>
</tr>
<tr>
<td>5. Skilled manual workers and technicians and supervisors of workers</td>
<td>13.5</td>
<td>8.9</td>
</tr>
<tr>
<td>6. Semi-skilled and non-skilled manual workers, incl. agricultural</td>
<td>8.3</td>
<td>6.9</td>
</tr>
<tr>
<td>7. Pensioners</td>
<td>29.8</td>
<td>34.3</td>
</tr>
<tr>
<td>8. Unemployed</td>
<td>15.0</td>
<td>12.1</td>
</tr>
<tr>
<td>9. Students</td>
<td>2.7</td>
<td>4.8</td>
</tr>
<tr>
<td>10. Others</td>
<td>3.6</td>
<td>6.3</td>
</tr>
</tbody>
</table>

In contemporary societies differences with regard to economic position, income, power resources, and work autonomy, are evident between representatives of the separate parts of the middle strata but also within the boundaries of the same stratum. The differences depend on occupation in the state vs. the private sector, on the economic importance of the branch, and on

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the size of the firm (here the highest-income companies are those in the field of information technologies\(^63\)).

In Bulgaria there are *large differences* between the incomes of the separate groups within the intelligentsia, depending on whether they are employed in the *private* or *budget* sector. Those occupied in the budget sector receive considerably lower salaries than their colleagues in the *prosperous branches of the private sector*, such as finance, real estate property, construction, telecommunications, etc. These are not just normal differences but large income inequalities that enforce the conviction of those in a disadvantaged social-economic situation that “the Bulgarian middle class, as yet, is only a dream”.

There are also *large differences in income* between the people employed in the *budget sector*: professionals receive considerably lower salaries than administrators and managers\(^64\). Also, some budget sectors are traditionally considered more prestigious and the professionals and experts employed in them have much higher salaries than their colleagues in other spheres\(^65\). Some of the inequalities that appear here are looked upon as something usual by Bulgarian society, but would be considered bizarre and paradoxical in other societies, not only in developed ones but even in those of the neighboring Balkan countries: the salaries of specialists with secondary education and even of low-skilled workers\(^66\) are in some cases higher than those of professionals with university education and special qualification\(^67\). Lowest paid are the representatives of the intelligentsia\(^68\) occupied in education, something that will have a devastating impact on the nation’s future. This cursory comparison of incomes of various social groups of the intelligentsia is not without a purpose, nor merely motivated by the wish to express solidarity with the concerns and problems of those who have been “underestimated” in economic terms. This situation is not due merely to accidental circumstances or oversight, but to a *state*

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\(^{64}\) School teachers, teachers in some universities, researchers in the Bulgarian Academy of Science, etc., have much lower salaries than officials in ministries, in local departments, commissions and other government institutions.

\(^{65}\) For instance, the salary of a non-commissioned officer in the army or police is higher than that of a professor in the Bulgarian Academy of Sciences (BAS) or in The University of Sofia “St. Kliment Ohridski”.

\(^{66}\) Such as workers in construction, in the security sector, transport, etc.

\(^{67}\) For instance, the salaries of nurses in certain hospitals are higher than those of associate professors in the institutes of BAS. Also, the salaries of cleaning women in banks are equal to those of professors in BAS.

\(^{68}\) The salaries of scholars in BAS are the lowest for their category of any European country.
policy that has persisted since after World War Two. The causes and objective of this policy is a separate topic; what is important for our discussion are the results of this policy: they are devastating not only for the consumption patterns and lifestyle of those directly affected and their families, but for Bulgarian society in general and for the future of the nation. The fact that part of the Bulgarian intelligentsia is placed in such a humiliating position draws the country further away from the developed societies and EU, to which political leaders since 1989 have declared they are leading the country. The situation is even much worse than in societies that are still far from EU membership. The causes are many and varied, but some important local factors are high level of corruption, inefficient juridical system, passiveness, low civic activeness, weak civil society, incomplete structures of civil society, and the lack of experience and skills for coordinated, united action to uphold common interests. Also, when these socio-professional groups of the intelligentsia are placed and kept in such a situation, they, as in a vicious circle, cannot fulfill the kind of leadership role their counterparts play in developed societies, where they are in the front ranks of civil society as enterprising social actors.

According to Table 7, in 2006 the small and middle entrepreneurs from small and middle business amounted to about 3%; in 2000 according to various representative surveys, their relative share varied between 5% and 12% of the adult population. Their incomes are considerably higher than those of the intelligentsia. The predominant part of the intelligentsia and entrepreneurs live in Sofia and the large cities, which has a certain impact on their consumption patterns and lifestyle. The exception to this rule are the independent farmers occupied in the agricultural sector, who generally live in villages and small towns. The latter usually have secondary education or higher.

Students, who have a lifestyle and consumption patterns similar to those of the middle strata, amounted to about 5% of the population in 2006, according to the data in Table 2.

Members of the middle strata in our country have a specific lifestyle that defines them as people who follow an “active strategy”69. Despite the impoverishment and low living standard, the presence of middle strata consumption patterns and lifestyle has been registered in surveys of Bulgarian society. What is defining for these patterns and lifestyles is not only the levels of income, which, as we saw, are lower than those of some skilled and even unskilled workers. In seeking additional sources of income and in distributing their household budgets, this category of

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people are guided by values and attitudes related to a modern lifestyle, and they follow a specific cultural model of thinking, valuation, and behavior. Their consumption patterns and lifestyle, together with their socio-economic and cultural characteristics of enterprising, active social actors, distinguish them from the other social groups and unite them into one category, despite the status differences between various parts of the middle strata. These features cause them to resemble their counterparts in developed countries: though they may differ from the latter considerably by income levels, they share similar values, attitudes and preferences regarding consumption and lifestyle.

The distinction between “nominal” and “real” middle class made by N. Tilkidjieva can be used as an apt methodological tool for analysis of the particularities of lifestyle and consumption models of the Bulgarian middle strata and for comparing them with those in developed societies. Here the analogy with “nominal” and “real” wage is appropriate, for the “nominal” middle class is that in our post-communist society, and the “real” one, in developed societies. This distinction enables understanding and explaining what seems at first glance to be a contradiction: why is it that the middle strata are generally said to be enterprising social actors, as mentioned previously, but before that it was said that their insufficient enterprise in our country was one of the reasons for the difficulties encountered here in “Westernization” of consumption patterns and strengthening of civil society? They are enterprising but only compared with other social-groups within their own society. But when compared with corresponding social group formations in developed societies, it becomes evident that the Bulgarian middle strata are still only “nominal”, not “real” middle strata like those in advanced countries.

As it was made clear in the Introduction, the middle strata are heterogeneous social-group formations. The considerable income inequalities between people occupied in the budget sphere and those in the private sector, as well as within the budget sector itself, have had a formative impact on their consumption patterns and lifestyle. Professionals and managers in some spheres of the private sector, such as finance, real estate, staff management, communications, media, show business, advertising, etc., have much greater opportunities to transform their cultural and organizational resources into economic ones. Some Bulgarian

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70 ibid. 386-399. 71 ibid. 400–403.
yuppies follow conspicuous consumption patterns and lifestyle, thereby giving public visibility to their social status. They are patrons of certain clubs and establishments, spend vacations in resorts that match their image, follow “refined” models of dress, choose “suitable” hobbies, diet, sports, etc. They are among the clients of malls and brand name stores, the clients of luxury hotels, of spa and wellness centers. They impose the consumer lifestyle in its contemporary Bulgarian version, striving to imitate their counterparts in developed societies.

Professionals from the influential electronic and printed media, advertising agencies, as well as representatives of celebrity pop culture in our country have an important cultural and especially organizational resource for exercising influence on the consumption patterns and lifestyle of various social categories, groups, and strata. There position as creators and especially disseminators of cultural models (especially when they are employed in prosperous media influential on public opinion), enables them to be lifestyle leaders. The combination of economic and financial resources with power resources and the influence of the institutions they represent, make them the Bulgarian “lifestyle trendsetters”. In some cases, what are obviously commercialized, even vulgarized, kitsch forms of mass culture are declared to be models of “elite culture”. These trends in consumption patterns and lifestyle of high-income groups of professionals in our country are not only a Bulgarian or post-communist phenomenon: they occur in every contemporary society. The trends evident in consumption patterns and lifestyle of postmodern society, are visibly present in our country as well. Here too we may point to the growing mass culture, vulgarization of taste, the imposition of pseudo-esthetic models as a standard of refined taste, consumerism as a criterion of modern lifestyle, etc. In other words, the negative tendencies in postmodern consumption and lifestyle are assimilated and disseminated much faster than the positive ones.
2. Stratified consumption: the middle strata lifestyle and social-group inequality

The consumption of middle strata stands out distinctly as a significant indicator of their status when it is compared with the consumption of other social-group formations. In this monograph I have used the findings of two representative empirical sociological surveys conducted in Bulgaria as part of large European surveys. The first was “Young People: Partnership, Marriage, Children”, completed in 2005; the second was “Relationships between Generations and Genders”, conducted in 2007.

In the first of these sociological surveys, a 15-level scale is used to determine the work and qualification status of the surveyed persons. In view of the objectives of this work, I have united groups that are closely similar in their characteristics, and have reduced the 15 levels to 6. As a result, the following socio-professional groups were distinguished: high-level officials/administrators/managers; intelligentsia and intellectuals; middle-level technicians and administrators with a higher education or college education; employees with a secondary education; skilled workers and non-skilled workers. In constructing these groups the following criteria were taken into account: the type of employment, the work situation, profession and professional status, occupation, education and qualification, consumption patterns and lifestyle.

Falling under the group of “high-level officials/administrators/managers” are the following: high-level officials, such as professional politicians, prosecutors, judges, high-level army and police officers, directors of large state enterprises and administrative institutions, bankers, managers in private firms. All these categories, by their position and the power resources stemming from that position, fall under the category of high strata, which is why they have been united in a single group. According to the results of the survey, the relative share of this group is 2.1% of all surveyed persons.

The next group, “intelligentsia and intellectuals”, comprises the following respondents in the survey: “specialists from the humane, economic, and liberal professions, with a higher education”, such as directors of cultural and educational institutions, economists, leaders of

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72 Both were realized by the Coordinating Research Council for Social Development and Social European Integration of the BAS, the National Statistical Institute, and Max Planck Institute for Demographic Research in Rostock, Germany, which financed the surveys. The Bulgarian part of the survey was headed by Atanas Atanasov of the Institute of Sociology (now Institute for the Study of Societies and Knowledge) of the BAS.
teams of specialists, researchers, lawyers, writers, painters, actors, physicians, clergy, journalists, university teachers, and “specialists in mathematical, technical, natural science professions, with a higher education”, such as leaders of production units, engineers, designers, specialist in agriculture, constructors, mathematicians, chemists, biologists. Intelligentsia and intellectuals are united into one group, because they are similar in education level, do highly-skilled mental and creative work with a relatively higher degree of autonomy. The share of respondents falling in this united group is 8.2%.

In the third group, “middle-level technicians and administrators with a higher education or college education”, are included technical managers and specialists, production technologists, laboratory assistants, medical nurses, and those classified as “middle-level administrative officials and specialists”. These include inspectors, information processing specialists, accountants, cashiers, school teachers and educators, economists. Falling under this category are 15.5% of the respondents. Their work is also high-skilled mental labor, although some of them, such as educators, laboratory assistants, medical nurses, and cashiers, may perform routine activities as well, while others, such as teachers, accountants, technical leaders, do more complicated and creative work. The previous group, “intelligentsia and intellectuals”, together with that of “technicians and administrators”, are representatives of the middle strata. They include professionals, experts, specialist, administrators, and managers.

The fourth group, “employees with a secondary education”, comprises those designated in the survey as “office employees” (typists, secretaries, administrators, suppliers), “occupied in trade and services” (store managers, sellers, postal service workers, security guards, hairdressers, waiters, cooks, firefighters), and “low-level leaders” (occupied in any sphere except agriculture and forestry; such as heads of brigade, foremen, heads of production units). Their percentage is 21.1%.

The fifth group are “qualified workers”, who are directly engaged in processing raw materials and materials; such as turners, mechanics, drivers, plumbers, electrical technicians, machine setters. Their percentage is 29.5%.

The fourth and fifth group, if characterized by the nature and contents of their work, their education, qualification and professional position, would be defined as intermediate groups with
intermediate status. They “possess the characteristics both of the typical middle strata and of the working class”\textsuperscript{73}.

The sixth group, “low-skilled workers”, comprises those occupied in auxiliary activities, such as packagers, warehouse workers, loaders, workers in road construction, unskilled workers in trade and services (store attendants, cleaners, sanitation workers, porters, waste collectors), and hired workers in agriculture, forestry, fishing industry. They amount to 19% of the surveyed persons.

The relative shares of the socio-professional groups described above are different from those cited in Table 7 of the previous paragraph. This is because the Table 7 refers to a population that includes school students and pensioners, and people of working age. In the quoted survey, *Young People: Partnership, Marriage, Children*, the various social groups include only those occupied under a work contract or civil contract, and exclude the unemployed, pensioners, and students of working age. The size of the sample and other particularities of the various surveys also influence the size of the relative shares of the various groups.

The relative share of the people possessing basic mass consumption commodities in the different socio-professional groups is indicative of their consumption patterns. It has been established that, even with respect to one of the most common products in use at the beginning of the 21\textsuperscript{st} century, the color TV set, some stratification in consumption is evident. Non-skilled workers appear to be the socio-professional group whose consumption is most clearly distinct from that of all other groups. Whereas about 99% of the respondents in the groups “high level officials/administrators/managers”, “intelligentsia and intellectuals”, “middle level technicians and administrators”, and “skilled workers”, possess a color TV, this is true for 89% of the non-skilled workers.

The next most widespread durable goods of consumption after the TV set are the mobile or stationary telephone (Graph 18) and the washing machine (Graph 17). Nearly all surveyed persons possessed a telephone and a washing machine, the lowest share of people possessing these being once again in the category of non-skilled workers – 81% and 72% respectively for the two items.

The socio-professional groups of high level officials/administrators/managers and intelligentsia and intellectuals appear to have similar consumption patterns as concerns the

\textsuperscript{73} Tilkidjieva 2002, 369.
possession of various durable items. The relative shares of the two groups were close in size with respect to color TV, telephone and washing machine, but also with regard to video/DVD player (see Graph 17 and Graph 18). The group of middle level technicians and administrators with higher and college education was similar to these two groups not only with regard to possession of color TV and telephone but with regard to the possession of washing machines. This shows that, with respect to the level of possession of widespread commodities of contemporary consumption in our country, the people belonging to the middle strata are close to the high socio-professional groups.

Graph 17:

The relative share of the people possessing basic durable goods in the different socio-professional groups (first part)

Graph 17, Graph 18 and Graph 19 are prepared using data from empirical sociological survey “Young People: Partnership, Marriage, Children”, completed in 2005.
The share of households of the category of the intelligentsia and intellectuals possessing a computer, a dishwasher and a video/DVD player (Graph 17) is even slightly higher than that of high level officials/administrators/managers. These two social groups have relative shares that are close in value with respect to possession of microwave ovens. With regard to possession of video/DVD players and microwave ovens (Graph 17), the middle-level technicians and administrators have relative shares that are close to those of employees with secondary education. The surveyed persons in this latter group who have a video/DVD player are close in percentage to the respective share in the skilled workers group.

**Graph 18:**

The relative share of the people possessing basic durable goods in the different socio-professional groups (second part)
The dishwasher (Graph 17) is an item the possession of which is characteristic for the consumption patterns of the middle and high strata; in this respect the intelligentsia and intellectuals are the socio-professional group most inclined to buy this article. This shows the value it holds for them as a means of alleviating domestic work and increasing leisure time.

The personal computer (Graph 17) is a device owned by more than two thirds of the intelligentsia and intellectuals, a little over two thirds of the high level officials/administrators/managers, and more than half of middle level technicians and administrators. It is an object typical for the lifestyle of the high and middle strata, of the people with a higher and college education. The higher the level of education, the more probable it is that a person will own a computer. Seventy percent of the surveyed university graduates and 42% of the specialists with a college education, over one third of the professionals who have specialized after completing their secondary education, and one third of those with a secondary education, have personal computers. The possession of a PC is correlated with place of residence: the highest share, 62%, of households having a PC are in Sofia; 56% of those living in a district center city have one, 46% of those living in a city, and 24% of rural dwellers. It appears that possession of a microwave oven increases proportionately to level of education: 55% of those with secondary education have one, and 71% of those with a higher education.

The highest share of people owning a car/van (Graph 18) is found among the high level officials/administrators/managers (90%). Three fourths of the intelligentsia and intellectuals have a car, which is close to the respective share of middle-level technicians and administrators (70%). The latter category displays a slight difference compared with employees with secondary education who have a car of their own (65%). With regard to the indicator “possessing a second car” (Graph 18) and, to a certain degree, “possessing a second home/country house”, high level officials/administrators/managers are definitely in first place: nearly twice as many households in their group have a second car compared with those of the intelligentsia and intellectuals.

The group of non-skilled workers has the lowest relative share of owners of these durable objects, even the most widespread ones.

There is an evident trend with regard to the reasons for owning a given object. Among high level officials/administrators/managers, the answer “I don’t have one, because I don’t want to” is prevalent; the lower the socio-professional status of a group, the higher the share of those who have indicated the answer “I can’t afford it”. 

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Among the intelligentsia and intellectuals we have the highest share of objects that facilitate household work (and increase leisure time), such as dishwashers, and of objects related to information technologies, such as a personal computer. Among high level officials/administrators/managers we have the highest percentage of owners of all the other categories of items, and this group displays a small difference compared with intelligentsia and intellectuals with respect to the above-mentioned objects. High level officials/administrators/managers group is definitely in first place with respect to possession of expensive objects such as a car, a second car, and a second home/country house.

Graph 19 confirms that the level of income is certainly not a definitive indicator of consumption patterns. Higher incomes can be no more than a precondition for certain consumption patterns and lifestyles. They create the possibility for satisfying needs by ensuring access to commodities of the desired quantity and quality, but they cannot in themselves determine what will be consumed, how much, when and how, nor the values, preferences, and tastes of consumers.

People with a tertiary education are not the group with the highest income, but in 2007 the percentage of people within this group that possessed a computer was almost equal to the percentage of people with computers in the highest income group (according to the data in Graph 19). The share of households with a net monthly income of over 1 401 BGN possessing a computer is 72%, and that of people with a university education and possessing a computer is 70%. The same is true as regards other non-mass (in the context of our standards) commodities, such as video/DVD player, microwave oven, and washing machine. Only about three quarters of people in the upper four income groups possess a microwave oven while dishwashers are even less common: the relative share of people possessing this item even in the highest income group is 29% (Graph 19).

\[\text{The Graph was built using the results of the Generation and Genders Survey, 2007.}\]
\[\text{One lev (BGN) is equal to approximately 0,50 euro.}\]
Graph 19:

The relative share of different income groups of households possessing basic durable goods

Graph 19 indicates that video/DVD player is the most highly preferred commodity among all household income groups. The highest share (88%) of people possessing these items is in the income group with a net monthly household income between 1001 and 1200 BGN. The share of households possessing a video/DVD player and falling under the high income groups does not get close to 100%, unlike the shares of households with TV sets, telephones, and washing machines for example. This shows that an item becomes a mass commodity not only because it is affordable but also because it has become a permanent part of the consumption patterns of large parts of the social strata and people feel it is necessary to possess this item. It has become a necessity that holds a permanent place in consumer practices and values.

The possibility of individuals and groups to plan their future, to direct and change it, is an important indicator for the activeness and initiative of these groups, and of their consumption patterns and lifestyle. As regards living from day to day, the high level
officials/administrators/managers are the ones who indicate such a situation in the least degree, and, according to the data illustrated in Graph 20, more than a third of them (38%) have a long-term perspective on the coming one or two years of their life. More than half in the categories of intelligentsia, of middle-level technicians and administrators, and of employees with a secondary education, have a clear idea about what they and their households will achieve in the coming six months. Over 80% of the intelligentsia and intellectuals have a clear picture about their near and more distant future, and just slightly more than one fifth of them live from day to day. This socio-professional group is in second position, after high-level officials/administrators/managers, with respect to these indicators, which demonstrates that their members do not drift with the current of life and circumstances, but strive to foresee and plan their lives and the lives of the people in their households.

**Graph 20**:

The relative share of the people planning their future in the different socio-professional groups

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The Graphs 20 and 21 were prepared using the results of the Young People – Partnership, Marriage, Children survey, 2005.
With regard to the capacity for planning their future, middle-level technicians and administrators are positioned between the intelligentsia and intellectuals on one hand and employees with a secondary education on the other. More than half of them (52%) have a clear idea about their lives in the middle-term perspective; more than one fifth (22%), in a long-term perspective; while more than one fourth (26%) live from day to day. Employees with a secondary education and skilled workers have similar characteristics with respect to activeness in life and the capacity of planning and directing their future. More than half of employees with secondary education (52%) have a clear perspective about the next six months, but nearly one third (32%) of them live from day to day.

Less than half of the skilled workers have a clear perspective on their life in the next half-year - 45% (Graph 20), but the share of those who live from day to day is close to this value, being 42%. Among the employees with a secondary education, those who can plan their future for the next 1-2 years are 16%, while among skilled workers the percentage is 14%. Non-skilled workers have the largest share of persons living from day to day: nearly two thirds of them passively follow the current (Graph 20). A little more than one fourth of the group are clear about what they will achieve in the next six months; and a little more than one tenth, in the next one or two years. They stand out as the socio-professional group with the most passive lifestyle.

An important indicator of lifestyle is the self-restrictions that various socio-professional groups display, as shown by data presented in Graph 21. It is indicative for the living standard in our country that 14% of high level officials/administrators/managers restrict themselves in consumption of food, a share that is close to that among the intelligentsia (17%) and middle-level technicians and administrators (18%). More than one fifth of employees with secondary education try to decrease their living expenses by restricting food consumption (22%), and this holds true for over one fourth (27%) of skilled workers, and 41% of non-skilled workers.
Restrictions in consumption of clothing and shoes, electricity and heating, receiving guests and paying visits, going on holiday and cultural recreation, prove to be a basic resource of Bulgarians for *coping with the economic situation*. With regard to these three items, representatives of all socio-professional groups economize.

The least degree of restrictions in spending on clothing and shoes is registered among the *intelligentsia and intellectuals* (38%), but the difference between their share and the shares of *high level officials/administrators/managers* (40%) and *middle-level technicians and administrators* (42%) is comparatively small. The relative share of *employees with a secondary education* who restrict their spending on this item is higher (46%), while among the *skilled and non-skilled workers* it amounts to about two thirds of each group (Graph 21).

About 40% of *high level officials/administrators/managers*, intelligentsia, and middle-level technicians and administrators restrict their consumption of electricity and heating, and this
is true for nearly half of employees with a secondary education, over half of the skilled workers, and under two thirds of the non-skilled ones. In this respect the socio-professional groups belonging to the high strata and those belonging to the middle strata prove to have similar consumption patterns. Similarities also exist with respect to the groups with intermediate status, such as employees with a secondary education and skilled workers.

Restrictions with regard to paying visits and receiving guests, going on holiday and satisfying cultural needs, are an important indicator of consumption patterns and lifestyle. Of all self-restrictions on various items, this is the item on which all socio-professional groups restrict themselves the most, except for non-skilled workers (who restrict themselves most of all on clothing and shoes). The lowest share of people restricting themselves on this item is registered among high level officials/administrators/managers (43% of the surveyed ones). Near to this share is the respective portion of intelligentsia and middle-level technicians and administrators, a little over half of whom restrict themselves. The share is higher among employees with a secondary education – 58%, and highest of all - nearly two thirds of respondents - among skilled and non-skilled workers. The representatives of the middle strata, intelligentsia, and middle-level technicians and administrators, are in an intermediate position between the high strata and the employees with a secondary education, with respect to self-restrictions.

The smallest share of people restricting themselves is with regard to medical treatment – 14% of all respondents (Graph 21). Only 6% of high level officials/administrators/managers and intelligentsia and intellectuals restrict themselves on treatment, and the figures are similar among middle-level technicians and administrators, employees with a secondary education, and skilled workers (with respective shares of self-restriction: 8%, 10%, and 12%). Over one fourth (27%) of non-skilled workers restrict spending on medical treatment, which means that their health is at serious risk.

The predominant part of the surveyed persons in all socio-professional groups shared that the restrictions they made had not significantly improved their financial state. This shows that most Bulgarians do not deprive themselves of these items in order to accumulate savings, but simply to cope with the economic situation.

The respondents felt their life two years before and at the time of the fieldwork (2005) had remained the same with regard to standard of living. Looking ahead at the next two years, the people who hoped they would be living better in the future amounted to two thirds of high
level officials/administrators/managers (69%), more than half of the intelligentsia group (53%), the middle-level technicians and administrators (51%), and employees with a secondary education (53%). About one third of skilled and non-skilled workers were of the opinion they would live “a little bit better”, and the same share in each of these groups felt their situation would remain the same. The two worker groups were less optimistic about their future living standard than the other socio-professional groups.

The results of the Generations and Genders survey of 2007 indicate that age and place of residence (Sofia, district city, city, or village) influence consumption and lifestyle. Beyond a certain age limit, the share of people gradually decreases who: can afford to heat their homes as much as necessary, afford to go on vacation, to replace old furniture with new, buy new clothes, invite guests at least once a month. There is an evident trend here: over two thirds of Bulgarians aged up to 44 (68%) can afford all the listed items. In the age group between 45 and 60 the share of people that can afford them decreases to 56%, and among those over 60 it falls to 28%. A large part of pensioners and elderly people are forced to restrict their consumption drastically, which marginalizes them and condemns them to meager consumption and an impoverished lifestyle.

In all, one fourth of Bulgarians can afford a one-week vacation away from home for their household. The greater part of Sofia residents can afford it (70%), but only 13% of rural residents can go on vacation. A similar correlation applies for the item “replacing old furniture with new”. Between one fifth and one fourth of residents of Sofia and of central district cities (22% in each of these two categories) can afford to replace their old furniture but only 10% of rural residents can do so. As for buying new clothes, a little over two thirds (69%) of Sofia residents can afford this, 63% of residents of central district city, 60% of city residents, and 42% of rural residents.

During the years of socio-economic transformations in our country, society has come to see in a new perspective the problem of the balance between labor and remuneration, between work, family, and personal life, between work and leisure.

For more detailed information concerning aging and inequalities in Bulgaria see Zlatanova 2015 - http://www.omda.bg/uploaded_files/files/articles/stareene-i-neravenstvo_1439823633.pdf
The group of questioned Bulgarian entrepreneurs also indicate the importance of this balance. According to them:

"Money earned through very hard work, with many deprivations, is simply not enjoyable money."

Due to the lack of such a balance, most of the participants in focus group discussions do not consider themselves successful: their business is "based on a lot of deprivation, on a lot of tension and work" and they practically have no time for leisure.

The lack of leisure among certain socio-professional groups is a phenomenon that was typical for the 20th century, being caused by a variety of factors. Some authors account for it by the development of mass production and mass consumption. It is related to the consumer society, in which most people have consumer attitudes and lifestyles, and consume not because they need to but for the sake of consumption itself, which demonstrates their status. People work increasingly and have no leisure: free time proves to be practically "cannibalized". It is eaten up by the need to work more and more, which proves damaging for communication within the family, for the rearing of children and their socialization, for integration in the community, for social contacts and relations in society in general. The decrease of leisure time among certain socio-professional groups is linked not to consumer attitudes but to the growing demands in the postmodern world regarding professional skills, achievements, and career. Such is the case of professionals, experts, specialists, and of other middle strata groups who, in order to meet these challenges, are restricting their leisure time. It is paradoxical that these are the socio-professional groups that value leisure the most.

The interviewed entrepreneurs compare the stress and the competition they are undergoing in a market-based society with the opportunities for "serious leisure" and "developmental leisure" they had in "totalitarian times".

"I don’t have the time, in the past I used to read a lot. Now I can’t permit myself the luxury of an evening of reading, of lying down, of resting on Saturday and Sunday. I’m constantly thinking about my work, about whom I must meet, about what might happen."

The quoted results are from a focus group discussion conducted in October 2006 in the framework of the Well-being and Identity module of the ESS. The team included: Nikolai Tilkidjiev, head, and the members Tanya Nedelcheva, Valentina Zlatanova, Maya Keliyan, and Ekaterina Markova. Maya Keliyan was moderator of this focus group discussion. The Well-being and Identity module is part of the ESS Bulgaria, headed by Lilia Dimova. For more details see Nikolai Tilkidjiev 2010, 5-12.

80 Schor 1998.
According to the respondents, professionals employed in the budget sector still have these opportunities. But while their lives are calm, they receive very low salaries, which is why

“... we can say they are not very successful, because their salaries are not very high.”

“But they live calm lives.”

Entrepreneurs are among the high-pressure occupations, and among them there is a shortage of time for leisure, typical for this social category; their leisure is almost entirely “engulfed by work time”, by the concerns of their business.

“The small and middle business is something awful. They pressure you on all sides, you are constantly living in tension, you can’t go calmly, go out, for instance go abroad, or even go on vacation within the country without thinking about your work.”

The balance between work and leisure, between work and the family, is perceived as an important and necessary condition for achieving success in one’s professional and personal life.

“The efforts I put into my work - I insist on pointing this out, because at times I have to work 16 hours a day – the work I do ought to bring me the amount of income that I would have with normal working hours - for instance in the range of 8 to 10 hours a day.”

The unequal distribution of resources, which is directly linked with the difference in leisure patterns, determines not only the degree of satisfaction of different social subjects with their lifestyle, but also their status self-identification. It impacts on the way in which they experience and assess social inequality.

Since the 1990s there has been an observable reverse trend as regards leisure in postmodern market societies. Among some social groups leisure time is getting shorter\(^2\), while among others it is increasing\(^3\). The question is which social groups have more and for which ones is it decreasing? It is diminishing usually among the high income, highly educated, and highly qualified groups, i.e. the upper, upper middle and middle-middle strata. These are the “income-rich, time-poor” referred to above, as opposed to “time-rich”, but income-low social strata. Among the groups that have a shortage of leisure, contradictions are more likely to occur between personal/family life and professional life, and a misbalance between these two is more probable.


\(^{3}\) Sullivan & Gershuny 2004.
We find that, according to entrepreneurs, the representatives of the new middle strata and specifically the young managers, administrators, experts, and professionals working for leading companies, firms, and administrations, are successful because they have achieved balance between their working time and their leisure time, between work and the family, between their income and the efforts invested for obtaining income, between their leisure patterns and the lives they are leading.

“Young specialists get very good salaries. We know such people with big resources, working in banks, in administrations, in firms as executive directors, as some kind of brokers, etc. There are banks where the incomes are the kind that we so-called businessmen do not have, cannot afford. Those people have an eight-hour work day, a regular lunch break, normal working hours, normal vacations, their business trips abroad are paid for... everything is as it should be.”

According to the surveyed entrepreneurs, the young highly educated professionals and managers of prosperous companies achieve the right balance between the kind of “abundant” leisure time that some employees enjoyed in the times of the communist past, but combined with high income and a “European work life and lifestyle”.

“This kind of person, he knows just how long his working hours are, he has a normal Friday, Saturday, Sunday. He works exactly like the state budget employees in the past... He works with European standards. This kind of person has long since become a European.”

The unequal distribution of means of labor, access to work and autonomy on the post-communist pseudo labor market has an impact on the consumption patterns and leisure patterns of the various social strata: this dependence is clearly indicated in the opinions expressed by interviewed entrepreneurs. It is not accidental that they describe themselves as “businessmen in quotes” thus emphasizing the difference compared with their counterparts in the developed EU countries. But in all European countries, together with the differences, there is an evident general tendency: those with a higher level of education and those with higher income indicate more often that they are finding it harder to achieve a balance between work and leisure. This misbalance is a consequence of their more active social life and the higher goals and expectations they have respecting their work and professional realization, and also respecting their personal life84. This shows there are social-group similarities between identical social strata

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84 First European Quality of Life Survey: Quality of Life in Bulgaria and Romania 2006.
in societies at differing degrees of social-economic development. Although situated under different conditions of work and life, members of the middle strata in our country and in the developed European societies indicate they have similar consumption patterns, leisure, and lifestyle, which is an important sign of the “post-modernization” of lifestyle in Bulgaria.

The results of the European Quality of Life Survey (EQLS) confirm the opinion of the quoted entrepreneurs regarding the length of working hours in Bulgaria. According to the data, Bulgarians have a comparatively longer workweek – nearly 41 hours, while the average for the 25 EU member states\(^5\) is 38 hours\(^6\). We also have the biggest problem achieving a balance between work, family, and social contacts. The surveyed Bulgarians indicate the greatest degree of difficulties in finding the time and energy to fulfill domestic and family tasks and in concentrating sufficiently at work. Bulgarians are in second place after the Rumanians in the proportion of respondents who share they do not have enough time for social contacts and a hobby.

On the base of the data received from Round 3 of ESS we could arrive to the conclusions concerning the degree of satisfaction regarding the proportion of time devoted to work and time for other activities, indicated by respondents from the former communist countries. As shown in the date represented in Graph 22, with respect to the category of respondents “very dissatisfied” with the balance they have, Bulgaria is in a middle position between countries with the highest percentages of very dissatisfied (Russia – 4,5% and Hungary - 4,4%) and the lowest (Estonia - 2,5% and Poland – 2,4%). Of all interviewed Bulgarians, 3,6% indicated they were “very dissatisfied” with the balance between their working time and their leisure; this figure is close to the percentage among the Rumanians – 3,9%. The share of those who were “dissatisfied” was highest in Rumania, where it was more than one third of the respondents (36,2%), followed by Poland – a little less than a third (30%). The lowest shares of respondents dissatisfied with the balance between working time and leisure were indicated in Estonia (22%) and Hungary (23,4%). As regards the percentage of people who stated they were “neither satisfied nor dissatisfied”, Bulgaria was once again in a middle position compared with other former communist countries – a little over one fifth of Bulgarian respondents (21,1%) indicated this answer, whereas Poland had below one third (29,2%); and Hungary, under one fifth (17,3%).

\(^5\) This refers to EU members at the time the survey was conducted, in 2006.
\(^6\) First European Quality of Life Survey: Quality of Life in Bulgaria and Romania 2006, 43-45.
The most satisfied by this indicator were respondents in Estonia – a little under one half (49.7%), followed by Hungary (41.7%) and Bulgaria (38.1%). Below us were Poland, Rumania, and Russia. The highest share of satisfied was registered in Hungary – 13.3%, followed by Russia – 8.6%; in our country the percentage was 7.6%, much higher than the figures in Poland (3.2%) and Rumania (0.9%).

**Graph 22**:  

**Level of satisfaction from proportion between time for work and time for other things in former communist countries (%)**

By degree of satisfaction with the balance between work and leisure time Bulgarians hold middle positions among the former communist countries. But what about a comparison with old member states of the EU? Were the quoted entrepreneurs right in saying that those who have achieved a balance between work and leisure are leading “a European style of life”, and “have now become Europeans”?

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87 Graphs 22 and 23 present the results from Round 3 of ESS.
The Bulgarian respondents indicating they were “dissatisfied” (30%) were more than those in Sweden (26,6%), which was the old EU member with the highest share of dissatisfied. As shown in the data represented in the Graph 23, the respondents from old member states and in the category “neither satisfied nor dissatisfied” were much fewer than the respective ones from the former communist countries: the greatest shares of people in this group were in Spain (17,6%) and Great Britain (17,1%), and the smallest was in Finland – 10,7%. In our country the percentage was 21,1%, which was greater than that in Spain and Great Britain and twice bigger than in Finland. More than half of the respondents from developed European countries were satisfied by the balance of their work and leisure time: in all these countries this was the answer given by more than half of the interviewed people; the percentage was comparatively the lowest in Great Britain: 50,2%.

**Graph 23:**

**Level of satisfaction from proportion between time for work and time for other things in old EU member countries (%)**
The highest share of satisfaction with the work-leisure balance among old EU members was indicated by the Finns: 64.4%. The share of satisfied Bulgarians was 1.7 times smaller than the figure for Finland. These data show that, overall, the respondents from old member states and in the categories “very dissatisfied”, “dissatisfied” and “neither satisfied nor dissatisfied” are definitely a smaller percentage than their counterparts from the former communist countries. The people from old EU member states were much more satisfied with this balance compared with those from new member states. But this trend is not valid for the respondents who indicated “very satisfied”: a higher percentage of Hungarians (13.3%), Russians (8.6%) and Bulgarians (7.6%) chose this answer compared with Spaniards (3.5%), Finns (3.6%), Belgians (4.3%) and Swedes (5.6%).

The conclusion we can make is that, overall, in the developed part of Europe a considerably better balance has been achieved between work and leisure time. The entrepreneurs who took part in a focus group discussion in Sofia proved to be right: those Bulgarians who display a good balance between work time and leisure do indeed have a European style of life.

The Bulgarian problems of work-leisure balance stem from the low productivity of labor in our country, from the particularities of the culture of social contact, where traditional elements predominate. Compared with the developed European countries, here there is a comparatively low degree of inclusion in social activities outside the family, of involvement in interest clubs and hobbies, participation in civic organizations, and of voluntary work.

The separate socio-professional groups in contemporary Bulgarian society have stratified consumption patterns and lifestyles. Among the middle strata, the intelligentsia and intellectuals stand out by their consumption oriented to items that make possible a more meaningful use of leisure time and to IT products. They are the socio-professional group with the most rational kind of consumption and leading the most active lifestyle, in which respect they surpass even high-level officials/administrators/managers, who are representatives of higher strata. The latter, however, have a considerable advantage with regard to consumption of luxury and prestigious commodities, which they can afford and evidently strive to possess. Middle-level technicians and administrators are another middle strata group, and they are close to the intelligentsia and intellectuals, but occupy more of an intermediate position between the rational and postmodern consumer orientation of the latter and the consumption of more mass commodities. Employees
with a secondary education and skilled workers, being groups with an intermediate status, are similar to the above-mentioned middle strata with respect to consumption of mass commodities. Non-skilled workers have the most limited consumption, and in their lifestyle they are most inclined to drift with the current of circumstances.

Separate social groups, categories and strata are becoming clearly stratified with respect to each other, and the ways and forms of their consumption, their consumer tastes, values, and orientations, characterize them as social-group subjects that each have a specific status in society. Consumption patterns, leisure patterns and lifestyles are becoming increasingly important indicators of social stratification in Bulgarian society.

The middle strata are clearly becoming the main bearers of trends that draw us closer to consumption patterns in developed societies. Their lifestyle displays their orientation to information technologies, leisure time, communication and a healthy way of life. By these distinctive features, they stand out as bearers of modern, innovative and significant trends of lifestyle in Bulgaria.

In Bulgaria, under the impact of the global postmodern environment, some leading world trends in consumption and lifestyle are already evident, though on a much smaller scale. Digitalization, a sign of the ubiquitous impact of information technologies, is present in Bulgarian consumer society and is changing it ever more vividly. But while in postmodern societies digitalization has reached a mass scale, in our country it is typical primarily for the lifestyle of the more educated, better-qualified, better-paid socio-professional groups, of the younger age categories, and especially of urban residents. It is typical for the lifestyle of our middle strata. In Bulgarian society, due to the conditions of its dramatic transition, the differentiating impact of consumption and lifestyle is much more visible than the integrating one. It tends to delimit social groups and strata much more than it unites. But in postmodern societies, due to their developed economies and much higher consumer standards and quality of life in general, there is a fundamental level of mass consumption that is accessible to wider social strata.
CONCLUSION

This study of middle classes lifestyle in Taiwan, China, Japan, and Bulgaria, of the changes they have undergone and their development trends, yields an answer to the basic question underlying the goals and tasks of this research: *what are the general similarities and differences between them?*

Despite these obvious differences stemming from the different living standards, consumer status, and market specificities in the four countries, there are also some important *general similarities* ensuing from the mechanism of contemporary social stratification and the place and role of the middle strata in the stratification structure of today’s increasingly global societies. In Taiwan and Japan as developed postmodern societies, on one side, and in China and Bulgaria, on the other side, alike, the new middle class enjoy more stable and favorable position in stratification structure. They are leaders in modern lifestyle, and followers of latest important trends of contemporary consumption. They are much more concerned about government environmental policy and they are paying special attention to their cultural activities and children extra-curriculum education.

The analyzed data from different representative sociological surveys prove the stabilization and development of Taiwanese middle class during recent decades. New middle class, with its two main groups – managers and professionals, remains most strong and prosperous segment of all middle class structures. Among new middle class the relative share of managers is decreasing on behalf of enhancement of professionals whose position is much more secure, stable and profitable. The old middle class is shrinking, mainly because of massive capital flows to mainland China that makes running the small business in Taiwan more difficult (than decades ago). Marginal middle class enlargement is explained by the service sector growth and continuing increase of women participation in the labor force (Tsai et al. 2014, 33).

The analysis of middle strata patterns of development in post-reform China and post-communist Bulgaria shows that *the decisive impact on them comes from the course, direction, objectives, and specific features of transformations in the two societies*. As one can judge by the cited data, the *Bulgarian middle strata are more widely represented than the Chinese ones*: their relative share within the total population is *more than four times as large* as that of their Chinese counterparts. Regardless of the social and economic differences between separate regions in
Bulgaria, the *distribution* of the middle strata in various parts of the country is more even. The comparison between *recruitment mechanisms* shows that in both societies, despite the role of education as an important resource for attaining higher status positions, what also has a very strong impact are the capacities for transforming the political, economic and social capital accumulated during the totalitarian period.

The emergence of a highly consumer-oriented professional middle class has been one of the goals of the Chinese political elite in the last years. The need for stimulating consumption, providing social and political stability and creating a more efficient and dynamic bureaucracy has forced the state to raise salaries and improve working and living condition of public sector employees and to give serious attention to their recruitment. In these social-economic conditions a lifestyle of the new middle strata is emerging and consolidating, in which relations outside the work place and work environment are becoming important, and there is growing emphasis on the values connected with leisure activities and consumption. Unfortunately, in Bulgaria such public policies are lacking, which is one of the main reasons why the growth and stabilization of the middle strata has been so difficult, especially of the public sector professionals, i.e. the Bulgarian intelligentsia, which is sinking deeper and deeper into status inconsistency between its high cultural capital and relatively low income.

Because they live in societies in which social-stratification structures are in a process of on-going crystallization, both Chinese and Bulgarian middle strata amount to very thin layers compared with those in developed countries; they are in a considerably weaker social-economic position, have much lower income and, respectively, a lower capacity for consumption. But despite this, the middle strata in both countries, as is made clear by the cited data and the preceding analysis, differ from the rest of the respective population by the values they share, their lifestyle and consumption patterns: in these they are more similar to their counterparts in developed countries than to other strata in their own societies.

The emergence and stabilization of Taiwanese and Japanese middle classes after World War Two is among major forces of both societies development and economic achievements. China is trying to follow their successful experience, but one of the important questions is: Could middle classes fulfill their significant social role to be precondition of prosperity and stabilization without democracy? Could middle classes flourish and prosper in society stricken by enormous social inequality and big poverty?
The subgroups based on age, gender, and forms of occupation have a structure-defining impact on Japanese middle class and its lifestyle. Growing social inequality has become noticeable in recent times, and this is influencing the shopping patterns and consumption in general, being materialized in different-standard stores, consumer and recreation centers. This inequality is increasingly determined by criteria such as education, qualification, occupation, gender, age, and marital status. The practical aspect and convenience are preferred qualities of consumption for the middle strata, who are more inclined now to prefer these to “conspicuous leisure”. This is a reversal from the conspicuous consumption that characterized the Japanese consumption patterns after the period of the “economic miracle”, when conforming to the conspicuous type was almost considered a measure of one’s affiliation to the middle strata. In recent years, “conspicuous consumption” and “leisure class” are associated with the upper strata, even though the latter frequent the same places for shopping and recreation as the middle strata. But in the latter’s consumer choice, the practicality of an item now prevails to a considerable degree over the consideration of brand name and costliness. Middle strata consumers increasingly demonstrate their status through pragmatic and rational choice, knowledgeably discriminating between symbols, quality, and price of goods.

Middle strata lifestyle in Taiwan, China, Japan and Bulgaria at the end of 20\textsuperscript{th} and the beginning of the 21\textsuperscript{st} century are increasingly globalized and influenced by the development of information technologies; they are increasingly linked to high technologies, even at everyday level. At the beginning of the 21\textsuperscript{st} century the trend of seeking greater individualization in consumption patterns and lifestyle among different middle class groups in four studied countries has grown stronger, and the fragmentation of consumer groups, even greater.

The recent trends, described above, and the growing socio-economic inequalities in four societies, lead us to presume that in the future the middle strata will continue to be leaders in imposing the following important directions in lifestyle:

- The demand for high tech, ecological, healthy commodities.
- Increased importance of the quality of leisure and of a “meaningful” lifestyle.
- Continuing preference for “ordinary” consumption patterns.
- Preserving the tradition of a lifestyle and consumption patterns connected with local communities and community activities.
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