

Methodological Approaches to The Research of the "Middle Class" Factor

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Abstract. The first views about the phenomenon known as the "middle class" in modern society, which causes many debates to this day, date back to ancient times. This article presents methodological approaches to the research of the "middle layer" factor.

Keywords: Middle layer, middle class, people, money, GDP, profession and social career, life quality.

1. INTRODUCTION

The ancient Greek dramatist (about 420 BC) Euripides wrote about the middle class: "There are three classes in the state: the first is the rich, they are of no use to the city, they are more useful for themselves. The poor and needy are also dangerous, they "squeeze their poisonous niche" by threatening the owners. Only the middle class is the backbone of the city. He obeys the law and the state. "[2]

2. LITERATURE REVIEW

Approaches to the nature of the "middle layer" were developed by ancient Greek and Renaissance thinkers N. It is expressed in the works of Machiavelli, T. Hobbes, D. Locke, I. Bentham, J.-J. Rousseau, F. Guizot, O. Mine, O. Terry and others. Views close to today's meaning of the "middle class" appeared in England in the 17th century.[1]

At the end of the 18th century and the beginning of the 19th century, English economists A. Smith, D. Ricardo and others tried to study the economic reasons for the division into classes in society. They explained the existence of classes, first of all, by their different sources of income.

G. Spencer distinguished three classes: lower, middle and upper. At that time, he showed their functions separately. In particular, the function of sustaining the life of society by growing raw materials for food and providing food belongs to the lower layer, the function of buying and selling products and their delivery belongs to the middle layer, and the management function that determines the development strategy of society belongs to the upper layer. [3]

Another thinker R. Worms evaluated society as a living organism. R. Worms' views differ from others in that, while his contemporaries focused on the source of income and professional status in the study of the middle class, R. Worms divided society into classes based on two dimensions - profession and social career unit.

3. ANALYSIS AND RESULTS

One of the scientists who made a great practical contribution to the development of the theory and methodology of the study of population classes is Karl Marx. K. Marx said that the existence of classes in society and the struggle between them is not his discovery. However, he deeply justified the class structure of society through a fundamental analysis of the entire system of economic relations. K. Marx noted that there is a large group other than Christians, petty bourgeoisie and professionals who do not belong to the "bourgeoisie-proletariat" scheme. However, the scientist confidently said that this class will disappear over time and "absorb" into other classes. In his opinion, the middle class hinders the class struggle because, he noted, they "lack initiative and enthusiasm." The word "class" appears in many works of K. Marx. However, critics have expressed the opinion that the "middle class" is not clearly defined and studied separately in his works.[4]

At this point, we explain why we prioritized the concept of "layer" and not "class" in the research work. "Class" means a group of individuals who have a definite place in a historically formed system of economic and social relations in a given society. This can be clearly seen in the example of the "bourgeoisie" and "proletariat" classes of the former Soviet Union. The "proletariat" class was valued only as wage laborers, and they recognized themselves as representatives of this class. In other words, they were rated as a class serving the bourgeoisie.

A similar class division can be seen in the case of 'castes' in India. "Castes" are strictly endogamous groups of people. Castes are distinguished by the performance of specific social duties and hereditary occupations, which may be related to belonging to a certain ethnic, sometimes religious community. Castes form high and low classes and

there are strict restrictions on the relationship between them. In Hinduism in India, mainly the division of people into groups according to a certain sign has taken a gross form. In particular, the highest castes - brahmins (priests) and military landowners (kshatriyas) were composed of large and medium-sized landowners. Merchants and usurers occupied the lowest rank. The next-ranking caste of zamindars (vaishiyas) were small landowners and farmers who were considered full members of the community. Even lower ranks included a large number of landless and disenfranchised peasants, artisans and servants (shudras). The lowest strata of them are the disenfranchised and most oppressed castes of "threatened" (pariahs).

The concept of "stratification" is explained by the fact that groups in society do not oppose each other or deny each other. The boundary between the upper, middle and lower layers of society becomes more transparent. The lower class, who have increased their income and earned a decent place in society by working on themselves and improving their knowledge, can move into the middle class and even the upper class, and vice versa.

Among those who conducted social research in this direction in England Ch. Booth, S. Rountree, A. Bauley, Beatrice and Sidney Webb are considered leading. American sociologist William Lloyd Warner (1898 – 1970) is one of the prominent researchers of social stratification.

Studying the "typical" culture of American society, Warner noted that the dominants of these cultures are realized through appropriate social stratification, and one of their important elements is the middle class. It is noteworthy that while Warner began his research with the hypothesis that income is the basis of social class division, he ended up substituting money (income, property, wealth) for intangible factors (such as recognition, respect, cooperation, participation in organizations, etc.) stated that it should be rotated.

During the Soviet Union, the problem of the middle class was hardly studied. This term was first used by Academician Zaslavskaya in the process of analyzing the structure of Russian society. [5] He defined the middle class as follows: "The middle class is a set of social groups occupying an intermediate position between the upper and lower layers of society, and performs the function of a specific social mediator." [6]

The author did not use the concept of "class" in his classification model. He preferred to use the concept of "layer". Zaslavskaya distinguished two strata: upper middle and middle stratum. According to the author, the upper middle class includes medium and large entrepreneurs, the middle class includes small entrepreneurs, managers of the production sector, managers of the non-production sector, high-class intellectuals, working elite, military personnel. Zaslavskaya also thought about the "base layer" and included mass intellectuals, trade and service workers, industrial workers and peasants in this layer.

In the scientific literature, two main theoretical and methodological approaches to the research of the middle class are distinguished. These are class theory and stratification theory. The first approach refers to the analysis of conflicts between different social groups, while the second one seeks to organize members of society using special criteria. Both practically and theoretically, the theory of social stratification has gained the most attention in the scientific community.

The founder of the theory of stratification was P. Sorokin, who proposed the most detailed classification of social groups based on some theoretical and methodological principles. The development of the theory of stratification by P. Sorokin made a great contribution to the development of sociology.

P. Sorokin defined the class as a "cumulative" group that includes three primary groups: professional, property, and legal groups. He proposed to consider the social status of people through indicators that he called social stratification. According to this approach, the most important concept is the strata, that is, the grouping of people whose common feature is the grouping of people, social groups and communities based on their relevance to different income levels, lifestyles, behavior patterns and their recognition in society.[7]

According to P. Sorokin, stratification is the hierarchical differentiation of certain groups of people (population), which is expressed in the presence of upper and lower layers. Social inequality is its basis and essence. This situation occurs in the uneven distribution of rights and privileges, responsibilities and obligations, the presence or absence of social values, power and influence among one or another member of society. The concept of stratification makes it possible to compare people, social groups, strata, communities, compare their situation in different countries or on the scale of one country, and describe them in order to determine the level of social differences between these strata.

The process of identifying classification criteria is still very relevant today. The criteria of social stratification can express the social reality in a particular society at a certain stage of its existence. The system of criteria that determines whether a person belongs to one or another social class is quite complex, but the current views on this issue have several common aspects.

P. Sorokin understood the social class as "a group of people who are similar in terms of profession, property status,

rights, i.e. owners of professional+property+social-legal interests". [8]

It should be noted that in different disciplines, different priorities are distinguished when determining belonging to the middle class. For example, economists primarily emphasize the "income-cost" factors; sociologists - finding one's place and social status; psychologists - focus on the ability to adapt to the changing conditions of economic reality.

L.I. Stadnichenko, among many criteria, the following are the most important ones that characterize social class:[9]

1. Economic variables: profession, income, level of well-being. Occupation and type of activity is the indicator that can give the most information about social class. The work a person is engaged in is undoubtedly reflected in his lifestyle.
2. Aspects of mutual relations: personal position, circle of communication, social relations. A person's status is also influenced by his achievements compared to the success achieved by other people in the same occupation. Relationships in society also determine a person's status. During socialization, a person acquires skills necessary for participation in the life of his society. Values, that is, a guide to how people should behave, is formed. These values show that a person belongs to one or another social class.
3. Political variables: power, class consciousness, mobility. Power is the possibility of certain people or groups of people being able to impose their will on others. One of the important indicators of social status is social consciousness. This indicator represents the extent to which people realize that they belong to a certain group with particular political or economic interests. As this level increases, people are more likely to join political parties, professional unions, and other groups in order to strengthen their interests. Mobility is the process of moving to higher or lower class groups.

According to M.Rybina, the emerging concept of the middle class is based on defining the following basic characteristics:[10]

- property status, attitude towards property, size and type of property owned by middle class representatives;
- have a stable high income to maintain their status. This, in turn, is distinguished by the costs and consumption structure that provides a lifestyle typical of a representative of the middle class;
- to have a high professional education and qualification that ensures social status and determines behavioral stereotypes;
- the level of satisfaction with the status of belonging to the stratum. In this, the formation and preservation of a society based on the primacy of laws and democratic values is the most important;
- the presence of a special mentality that representatives of the middle class will have. In this, in the system of values of this mentality, the representatives of this class consider the idea of development of the state, of which they are an integral part, as their mission, which makes it possible to define the middle class as a cultural phenomenon.

According to M.K. Gorshkov, four main approaches are used to distinguish the middle class in Russian sociology.[11]

The first of them is related to viewing the middle class primarily as a mass social entity characterized by relatively high living standards and spending levels. According to this approach, as a criterion for distinguishing the middle class, the level of income per capita or the possession of a certain set of valuable assets is used.

The second approach focuses on the specific psychological aspects of individuals in determining the criteria of the middle class. Because it is they who have the strongest influence on the social sense of the class and on the socio-political mood and behavior. In this case, the middle class is distinguished on the basis of people's opinion about themselves, their "inclusion" in the composition of the middle class.

The third approach, the middle class is divided into two: the "new" middle class (which includes managers and professionals with developed human capital or power resources) and the "old" middle class - representatives of "small businesses" that receive dividends through their economic capital.

This approach to the analysis of the middle class is based on the powers of authority, the size, type and composition of capital possessed by this or that person, household, class, etc.

A fourth approach relies on traditional criteria for distinguishing the middle class. They include certain professional characteristics, education level, property-income qualities. Sometimes they are also accompanied by a sense of self. Depending on the ability of the middle class to perform different functions, this list of criteria can expand. This approach is more common in empirical studies of the middle class.

Often in scientific literature, the level of material well-being is taken as the main, and in some cases, the only criterion for determining the middle class. The reason why this criterion is so widely used is the ease of its calculation and the demand for researching consumer behavior of the population.

For example, American scientists N. Birdsall, K. Graham, and S. Petinato used income indicators in their research to determine the size of the middle class in different countries and describe it. Explaining their choice, the authors note that this criterion allows conducting cross-country studies and recording changes in the size of the middle class over time.[12]

It should be noted that today in our social sciences, although there are various literatures that give different definitions of the middle class and its number, there is no generally accepted and empirically based structural model of it. [13] There is no single interpretation of the middle class in sociological research. Often, it is understood as a class occupying an intermediate step in the system of social stratification, with different status, consciousness and political behavior.

The middle class of each country has its own characteristics. As a rule, similar systems of stratification indicators are used to measure the middle class in different countries. Usually, to determine the middle layer, the following several main criteria are distinguished:[14]

1. material well-being (material status);
2. ownership of means of production (capital);
3. professional position (social-professional) status;
4. political status;
5. social mobility potential;
6. prestige of lifestyle (form);
7. social reputation.

The table below provides a cross-country comparative analysis of the middle class.

Table 1: Comparison of middle layer extraction criteria

Country	Criteria for extracting the middle layer
USA	- income level - level of education - level of self-awareness - use of credit
Great Britain	- level of education - income level - occupation
Germany	- income level
Poland	- occupation - a relatively high standard of living (income accumulation, assets, in particular, savings and their use) - property - unique worldview, beliefs and values - material standard of living and behavior related to faith
Russia	- high level of professional education (higher education) - income level - consumption patterns (level) - level of self-awareness
Belarus	- to have property - income level - level of education - the prestige of the profession - specific form of self-awareness (level of self-awareness) - lifestyle - value system and mentality
Ukraine	- level of self-awareness - level of education - material satisfaction - type of training

The listed criteria do not have the same value, that is, one of them has more influence than the other in determining

the middle layer. The weight of these criteria depends on the cultural and historical environment.

In the last few decades, indicators of material well-being and occupational status have risen to the first place in countries that have transitioned to a market economy.

The mentioned criteria for entering the middle class can be important for any country, but this process should not be carried out without analyzing it at a certain level of national economic development. Because any criteria are, of course, relative and should be considered taking into account the economic situation in the country as a whole.

Thus, our comparative analysis showed that the criteria for defining the middle class have different characteristics for each country. This, in turn, somewhat limits the possibility of cross-country comparative analysis.

In general, the concept of "middle class" is a much discussed and variously interpreted category of social stratification. If we dwell on the issue of the existence of a middle layer, it should be noted that the group that performs the function of the middle layer is considered "middle layer". It may differ from its analogues in other respects. Because socio-political, economic, cultural development is different in different countries. There has been and will be a middle class. They never completely "disappear". Only their size, character and composition change. Accordingly, in determining the middle class in each society, it is necessary to proceed from its specific function in the society.[15]

The modern theory describing the social structure of society goes back to two main sources - the theories of K. Marx and M. Weber. These theories are often pitted against each other. But they complement each other. Both concepts considered the development of class structure as a phenomenon of capitalist society based on the market and private property. Both K. Marx and M. Weber used the class category to define socio-economic groups and considered property as the basis of class stratification.

There are several approaches to defining the concept of "middle class" today. One of them is based on the following theory: the middle class is a layer of society located between the upper and lower classes. This view is based only on economic criteria. In other words, it implies the stratification of society according to the level of property status of people. For example, in the West, a person with an average monthly income of 2-2.5 thousand euros is included in the real middle class.

Organization for Economic Co-operation and Development (OECD) version: IHTT includes people whose income corresponds to 75-200% of the median total income of the population in the middle class. The median is the income of the person in the middle of that range. That is, half of the population has a lower income than this indicator, and half has a higher income.

Credit Suisse version: one of the largest banking conglomerates also focuses on the state of the middle class in its annual Global Wealth Report on the well-being of the population of different countries.

According to the interpretation of Credit Suisse, a person should earn 5-25 thousand dollars, that is, about 5-25 million soums per month at the current exchange rate, to join this layer. [16]

Version of The World Data Lab: In 2018, the consulting company included about half of the world's population, 3.59 billion people, among the middle class and wealthy. In calculations, the company used the method widely used in the world. According to him, anyone who earns 11-110 dollars a day is considered middle class. The authors of the study admit that there is no clear definition of the middle class and define it as follows: the income of a representative of the middle class is enough for him to purchase durable goods (for example, a car, refrigerator or other large household appliances), plan vacations, enjoy leisure time, and in case of illness or layoff. it should allow you to save enough money to not fall below the poverty line.

Meanwhile, The World Data Lab predicts that the middle class will grow and reach 5.3 billion people by 2030. And a large part of it corresponds to the population of the Asian region.

In addition, according to company analysts, representatives of the middle class can cause problems for large enterprises. "Most multinational corporations always offer the same product in a certain sense, and the middle class likes unique, differentiated offers," says Homi Haras, a senior researcher at the Brookings Institution and head of research at The World Data Lab. In his opinion, the state cannot ignore the middle class, because it is often the driving force of civil society. [17]

The most comprehensive calculation used by Martin Ravallion of the **World Bank includes anyone earning between \$2 and \$13 a day in the middle class.** Designed to measure the expansion of the middle class in emerging markets, this definition includes those who have passed the World Bank's \$2 poverty line. Using this method, China and India have made incredible progress in this regard in the last fifteen years and formed a real middle class. But given comparative value and scope, most people in advanced Western economies are very poor by this measure. [18]

Global Journal of Human Social Science (Global Journal of Social and Humanities, USA) version: the middle class is a social group of people with a certain level of stability and sufficient income to meet a wide range of material

and social needs.

A distinctive feature of this layer is its high level of education. The function of the middle layer includes the introduction of new products and innovations, the reproduction of the results of expert labor, and perhaps the support of long-term peace and stability in society. [19]

The lack of a unified approach to the description of the middle layer leads to different interpretations of this category. There are many approaches to defining the middle class in scientific works: they are the current personal income level, self-awareness, education, culture, skill level, fundamental values, motivation for economic and social activity, private property, etc.

Many criteria lead to very different results regarding the size of the middle layer. The lack of a clear description of the size of the middle class as an object of economic policy makes it difficult to study the functions of the middle class in the economic system and to achieve the goals of economic policy to seriously increase its share in the structure of society.

4. CONCLUSIONS

Summarizing different methodological approaches to determining the boundary of the middle class, it can be said that there are three ways of dividing it: "personal recognition" or subjective method; "reputation assessment" method; objective approach.

Many modern researchers use a complex of objective and subjective indicators to determine the middle class. These are:

- the level of well-being that determines the quality of life;
- the level of education and culture that allows to perform highly qualified work;
- economic behavior reflecting aspirations for economic independence and capital growth;
- clearly defined values of the worldview, etc.

The difference in the definition of its professional composition in the views of middle-class researchers is very small. They include scientific and engineering technicians, salaried management personnel (middle managers), intellectuals, urban and rural small and medium owners (including the majority of farmers), highly skilled workers in the field of material and non-material production (as mentioned above). , this issue is somewhat controversial), freelancers. Undoubtedly, higher education is emphasized by many scholars as one of the main factors of the middle class. For the middle class, material and immaterial interest, lifestyle has its own character.

In modern socio-philosophical literature, normative and relativistic views are used to define the middle class. According to the normative approach, some ideal model of the middle class is created based on the standards of the developed Western society, and researchers use this model to analyze other societies. For example, in Western countries, based on this model, the professional layer that forms the middle layer is determined, and all other societies are analyzed based on its characteristics (including Central Asian or other regional countries).

The relativistic approach, on the contrary, creates a model of the middle layer that is suitable for each historical period and each specific country. Of course, each approach can be used to learn the middle layer. It cannot be denied.

If we compare the state of research on the social structure and the middle class, even if we compare Russia and Uzbekistan, it is obvious that we are far behind in this matter. Because in Russia, entire scientific communities study social structure, social stratification, middle class and related problems. In Uzbekistan, it is limited to individual theoretical conclusions. In our opinion, a comprehensive approach to the study of the middle layer is necessary. It is very important to develop the middle class, which is considered the main link of the society.

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