DOES THE BLACK MIDDLE CLASS EXIST AND ARE WE MEMBERS?

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Reflections from a Research Team

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CONTENTS

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E. Khosa-Shangase, K. & Canham, H. (2019). *Black Academics' Voices: The South African Experience* (2019). Her creative work includes the short story *Mama's Walk* in the 2012 Caine Prize for African Writers, and a children's book titled *Khumo's Airport Bag* (2015) published in Setswana and English. She is passionate about mentorship and has successfully supervised over 30 research projects. She has also presented more than 60 papers in international and local conferences.

Kris Marsh, PhD: Professor Kris Marsh received her PhD from the University of Southern California in 2005. She was a Postdoctoral Scholar at the Carolina Population Center at the University of North Carolina before joining the faculty of Maryland where she has been tenured since 2014. Professor Marsh's general areas of expertise are the Black middle class, demography, racial residential segregation and education. She has combined these interests to develop a research agenda that is divided into two broad areas: avenues into the Black middle class and consequences of being in the Black middle class. Currently, she is writing a book for Cambridge University Press on the wealth, health, residential choices and dating practices of members of an emerging Black middle class who are single and living alone. She also teaches courses on Research Methods, Race Relations and Racial Residential Segregation. She has been a visiting scholar at the University of Southern California, the University of the Witwatersrand in Johannesburg and the UJ. She has served as a contributor to CNN in America, the Associated Press, NBC Washington and Al Jazeera America and is frequently asked to contribute to the Washington Post. She serves as the secretary of the District of Columbia Sociological Society and the managing editor of *Issues in Race & Society*. She was awarded the Jacquelyn Johnson Jackson Early Career Award from the Association of Black Sociologists in 2015 and received

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Leo Igbanoi, DLitt et Phil: Leo Igbanoi received his doctorate from the UJ in 2019 having been a recipient of the Global Excellence Stature Fellowship between 2016 and 2018. He was a lecturer in Gender Studies in the Department of Sociology at the UJ before joining the National Institute for Legislative and Democratic Studies, Abuja, where he is a Social Sector Analyst and teaches a course on Citizens and Political Change. He was a visiting research scholar at the University of Maryland in 2018. In 2010, he was awarded the Prize for African Studies at the Arrupe Jesuit University, Harare. His research interests include black masculinities, the black middle class, migration in Africa and the intersections of gender and social policy. He has presented papers at local and international conferences, and has been a contributor in two books, including *Treatise on Legislative Capacity Development for Good Governance in Nigeria* (2019).

Lesego Plank: Lesego Plank was awarded her Masters in Sociology from the University of Johannesburg in 2018 for a study titled *The Experiences of Single Black Middle Class Women from Soweto of Intimate Relationships*. She is currently a PhD candidate at UJ, under the Department of Sociology. Her PhD is focusing on Black motherhood, particularly the aspect of absent mothers and the idea of how motherhood

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Mabone Kgosiemang: Mabone Kgosiemang is currently a PhD candidate in Sociology. He has obtained all his academic qualifications from the UJ. He was active in student politics in his undergraduate and early post-graduate years. He worked as a tutor in the Department of Sociology in 2016 and 2017. In 2018, he was appointed an assistant lecturer in the Department of Sociology at UJ. He has taught on Religion and Deviance, Power, State and Workplace and finally Social Inequality, focusing on Race, Class and Gender. He is a SASA member, a former SASA council member and has presented and chaired multiple times at SASA conferences. His recent publication is titled "*University Transformation Re-imagined: Discourses Resulting After the Fallist Movements*" (2018) in the book *We Are No Longer at Ease: The Struggle for #FeesMustFall*. Johannesburg: Jacana. His research interests are on race and racism, student politics, higher education, transformation and decolonisation.

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Lesego Plank: To my family *abakwa* Plank and the Nyanisa's, thank you for your constant support and love. To Professor Grace Khunou and Professor Kris Marsh, thank you for entrusting me to be part of this study and making a contribution in so many ways. I have learnt a lot from this project academically, personally and spiritually and I have gained a lot from this journey. To the participants I interviewed, your experiences and your thoughts, the conversations we had, have really encouraged me to be and do better. Thank you. To my friends, thank you for being there and for being proud of me. Thank you for the constant video calls and phones calls to check up on me when I was in America. To the whole research team, thank you, beautiful souls. You are a force to be reckoned with in the academic space! Remember Black child, we are our ancestor's wildest dreams!

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Mabone Kgosiemang: I would like to thank and acknowledge everyone who has supported my academic growth and development, especially Professor Grace for being there during the entire journey. To my friends, both Magents and those from the academy: thank you for pushing me on days I felt tired and demotivated. To Professor Grace and Professor Kris thank you for the opportunity, in both South Africa and the United States; I grew and learned a lot. UJ and the Department of Sociology there, I thank you for the intellectual advancement; may other young Black academics experience similar. To my family, the Kgosiemang family, who my ancestors gave me and God blessed me with, I thank, love and appreciate you. None of this would be possible without your love, peace and belief in me. To my ancestors and God, may my prayers continue to be heard.

If we forgot to mention you, please charge it to our heads and not to our hearts!

PREFACE: IMPLICATING OUR BODIES IN RESEARCHING THE BLACK MIDDLE CLASS

Blackness is as open and as complex as the wide turbulent seas. This openness is a challenge and opportunity for those of us who work in black studies to trace and unfurl the contours and untangle the knots of the multiple ways of being black in the world. The black middle class is one of the strands of blackness that the academy has taken a keen interest in. This curiosity has been driven by multiple agendas which span from narrow consumerism which sees black people as not just workers but as eaters with increasingly refined and expensive tastes. This research has been about critically engaging with processes that cultivate a capitalist market for growing profits in an increasingly unequal world. At the other end of the spectrum are researchers committed to the nuances in identity that have emerged as a consequence of class transitions. Here, there is an increased concern with the ethics of class and self-reflexivity on the part of those doing this research. This book falls within the latter category of work. Grace Khunou has been on the edge of the black middle class wave of research over the past decade. Ever ahead of the wave, in this collection she is joined by African American scholar Kris Marsh and together they turn around to think about the process and meanings associated with researching the black middle class. But they take it a step further to think together with students for a communal

reflection of what it means to do this research. This is a crucial turn because it centres reflections of graduate students in the cusp of their own class transition. In South Africa and elsewhere, it is still fair to say that the more education one has, the greater the likelihood they have to enter into a new class position if they and their families had previously been working class as has been the case for the majority of black South Africans. But class movement is complex and does not occur in a straight line. These reflections point to these movements and the nuances in the lives of the researchers.

Class scholarship in South Africa has long needed a truly intersectional lens. The strength of this work is the positionality of the contributors. They are mostly women, they are black, and they inhabit class jauntily as largely first generation black middle class persons or in the liminal spaces between classes. Their reflections about their work on this topic are inflected with their own positioning and negotiations of intersecting identities. In this volume, we have the opportunity to see novice scholars cut their teeth in the academy under the sisterly guidance of experienced editors. This is not a trite undertaking. It as an important political intervention for both class scholarship and mentorship of the next generation of researchers. Khunou and Marsh do not just bemoan the marginalization of black women in the South African and global academy – they intervene decisively. This project bears witness to this. I frame this intervention as decolonial because decolonization is a process of doing. It not only challenges coloniality but leads to discernible change.

Our scholarship is better for this intervention. We now have a perspective of what it means to do this research in an ethical and embodied way from black peoples varying positionalities. With the publication of this volume, we no longer have to rely only on 'objective' accounts that do not implicate the bodies of those who produce scholarship about others.

Hugo Canham, Associate Professor of Psychology,
University of the Witwatersrand

1

WHO IS THE BLACK MIDDLE CLASS IN HISTORY AND THEORY?

INTRODUCTION

Since the African Development Bank published *The Middle of the Pyramid: Dynamics of the Middle Class* in 2011, studies on the Black middle class in South Africa have proliferated. These studies have confirmed that the Black middle class is on the rise (Khunou, 2015a; Krige, 2012; Ndletyana, 2014; Southall, 2016; Statistics South Africa, 2009). The growth of a Black middle class has been regarded as an important benchmark for Blacks' social, political and economic standing. Ndletyana (2014) suggests that middle classes are also important for strengthening democracies, as their power lies mostly in their citizenship rights.

We will see, however, that the definition of middle class is a shifting target. While many studies grapple with how to define the Black middle class, and some try to unpack self-definitions of middle class, this study, unusually, turns the lens on the researchers as well as the researched in order to get a

handle on a slippery concept. As Black researchers studying the Black middle class, we recognised the importance of reading ourselves as possible insiders and outsiders to the middle class position and how that impacted how we engaged with the participants and theorising on the concept. In our endeavours to do research, we have engaged emerging researchers in this project as important knowledge creators and not as merely fieldworkers as is done in most studies.

This chapter will outline some of the challenges of defining the concept through a historical and theoretical lens before introducing reflexivity as a tool to better meet these challenges.

The social mobility of Blacks into the middle class position is often purported to be evidence that racial discrimination and prejudice have eroded; this is assumed even when continuing inequalities illustrate the continuities of discrimination. In South Africa, this growth is also erroneously viewed as an indicator of a shift from the significance of race to the importance of class as an analytical lens. Seekings (2013) suggests that at some point during apartheid and in post-apartheid South Africa, the privileges enjoyed by Whites became more about their class position rather than a result of racial discrimination. The analytical lens provided by Seekings (2013) is skewed as there is an underlying suggestion that, when not legislated, racial discrimination disappears. Such a lens fails to acknowledge the enduring link between racialisation and resource allocation (Posel, 2010). Again, the privileges accrued as a result of racial discrimination are maintained in multiple ways including continued racial discrimination (Canham, 2014) with regards to access to jobs, and the continued racially skewed access to the economy. This continued link between race and resources remains, but it is important to acknowledge that the growth of the Black middle class since 1994 is a result of the democratic state's attempts at racial redress (Ndletyana, 2014).

The fact that the Black middle class makes up two-thirds of the South African middle class is a key factor in the misconception that class has become more significant since 1994 (Canham & Williams, 2017). Similarly, Krige (2012) shows that the size of the Black middle class remains significantly low in South Africa. Additionally, Mattes (2014) warns that the emergence of the Black middle class does not necessarily equate to political difference within societies. For instance, in post-apartheid South Africa, most townships and rural areas, which are predominantly Black, are still struggling to access basic necessities such as water, sanitation and electricity, and in other township areas they still live in overcrowded backyard shacks (Beall, Crankshaw, & Parnell, 2002; Mattes, 2014). This indicates how the notion of "middle class" in South Africa is complex, context-dependent and thus regarded as problematic. One of the major reasons for this is the historical basis of colonisation and apartheid, as these systems produced high levels of inequality in the country (Khunou, 2015a).

The middle class position has different elements to it; it would thus be erroneous to assume it is a homogenous group. Research shows that the middle class is made up of different categories, such as lower, middle and upper middle class categories (Burger, McAravey, & Van der Berg, 2015; Visagie, 2013). Scholars such as Bourdieu (1996) and Fulton, Furman, and Findlay (2014) have argued that those who are in the upper middle class position are perceived as being more affluent than those in the middle and lower middle class categories; they have the ability to choose and they are afforded the choice to spend and are able to save more money compared to other middle class categories. For example, Southall (2013) shows how, in South Africa, the annual income in the year 2000 for those in the upper middle class was more than Rs. 150,000, and for those in the lower middle class position

it was around Rs. 59,000 in a year. The upper middle class are believed to be working as highly qualified specialists, who are highly educated and are occupying high level managerial positions compared to those who are lower middle class, who work as clerks, lower level managers, sales persons, middle managers and crafts people (Fulton et al., 2014; Southall, 2013, 2016).

A HISTORICAL OVERVIEW OF THE BLACK MIDDLE CLASS

A historical analysis of South African society illustrates that the Black middle class is not a new phenomenon (Mabandla, 2013; Melber, 2017; Ndletyana, 2014; Southall, 2016). In historical studies, this category encompassed the notions of a well-established Black middle class that owned land and livestock (Bundy, 1988; Murray, 1992; Peires, 1989). The African middle classes were achieved mainly as a result of missionary stations during the colonialisation era (Mabandla, 2013; Ndletyana, 2014). The aim of Christian missionaries was to civilise the way of life of the Africans, believing that it did not fit in with their own colonial mandate and principles. The promotion of education, the demolition of traditional rondavel houses and their replacement with square houses, and the purchase of westernised furniture for their households, were ways of changing the way of life of Africans (Mabandla, 2013; Southall, 2016). The consumerist lifestyle of the African elite benefited the colonisers and capitalism in many ways.

Part of the civilising mission was to create a buffer class, a trend famous in the British divide and rule strategy (Ndletyana, 2014). This buffer class was created mainly through education and was also achieved by encouraging Africans to

learn how to read the bible, as it was believed that this would make them repent of their evil ways of life and refrain from their traditional practices (Mabandla 2013; Melber, 2017).

Education of Africans meant that they could work as nurses, clerical officers, priests, farmers and teachers (Mabandla, 2013; Ndletyana, 2014). This afforded them the opportunity of being leaders in their community, because of their education status; they were able to speak the colonisers' language, write and understand most aspects of the colonisers and this advantage allowed them to represent their people (Southall, 2016). Despite their privilege over those who were poor and less educated, the Black middle class were still restricted in many ways by the colonial system. Melber (2017) contends that the major reason for their restriction and limitations was because of their race, and this meant that race for the African was a hindrance to their upward mobility. Likewise, during apartheid, class positions in the country were constituted on the basis of race – remember that apartheid was a system which prescribed racial segregation and discrimination for the benefit of the Whites (Khunou, 2015a). On the one hand, the system ensured that Whites were empowered, through ownership of the means of production, access to quality education, adequate housing and healthcare services (Melber, 2017). This was regarded as an act to actively build the White middle class and ensure its sustainability for years to come, thus even in contemporary South Africa, the White middle class is maintained. On the other hand, Blacks during apartheid were at the receiving end of disenfranchisement achieved through dispossession of land and subjugation (Ndletyana, 2014). Thus, Blacks in the middle class remained in the margins, with no equal access to opportunities like those that privileged and aided their White counterparts (Southall, 2013; Visagie, 2011).

Alternatively, scholars such as Hoosen and Mafukdze (2007), Ndletyana (2014) and Ngoma (2015) argue that, in

many ways, the apartheid government endorsed the Black middle class as one of their strategic plans, as they wanted to create a division amongst Black people, creating a conflicting debate around "us" and "them" among Blacks. This was because in South Africa, there were very poor Blacks, who were even struggling to make ends meet, while the Black middle class were in a seemingly comfortable position, as they had access to a number of opportunities and lived a better life than poor or working class Blacks (Ngoma, 2015). For instance, most of the Black middle class lived in bigger and adequate houses, they were educated and had better job prospects and better income. The apartheid government was more invested in protecting their power and thus supported the Black middle class in order to create conflict, so that Black people become fragmented and do not focus on pertinent issues of the struggle against apartheid. During apartheid, some people who were middle class were regarded as sell-outs of the struggle as they were seen as allies of the apartheid government (Southall, 2016).

However, it is crucial to highlight that, even though the Black middle class were receiving benefits from the apartheid government, they were restricted in several ways and because of their race (Khunou, 2015a). In most cases, the Black middle class were mostly restricted to live in areas designated "Black". For example, Diepkloof extension was built for the Black middle class in the township of Soweto. They did not live in residential areas which were occupied by and reserved for Whites. This is an indicator of how the apartheid government promoted separatist development policies even amongst the middle class (Kros, 2010); thus, class was less significant as a marker of status and access for Blacks (Khunou, 2015a). Even when it came to employment opportunities, Black middle class professionals, such

as nurses, teachers, police and social workers, were to work in the townships and treat other Black people, while White professionals were employed in predominately White areas and hardly worked in Black townships (Kros, 2010), which meant differential pay. Ngoma (2015) confirms that there were disparities in how they were paid: White middle class professionals were paid more than Black middle class professionals. Additionally, the working conditions for the Black middle class were inadequate (Kros, 2010): in hospitals, they had shortages of medication and resource limitations in public schools, where they had to deal with overcrowded classrooms, which made teaching difficult. These difficulties, writes Ndletyana (2014, p. 7), were because homelands – and one could say later townships – "were economically unviable and depended wholly on the apartheid government for their budgets".[1]

DEFINING THE BLACK MIDDLE CLASS

Defining "middle class" regardless of race has proven difficult (Alexander, Ceruti, Motseke, Phadi, & Wale, 2013; Southall, 2016; Visagie, 2013). This conceptual complexity is especially challenging when defining it with regards to Blacks because it has long been acknowledged that there exist oppressive, discriminatory and racist systems against Blacks in both South Africa and globally. Traditionally, social scientists have relied upon education, occupation, income, wealth and spending patterns as objective indicators of socio-economic well-being and middle class status (Babu, 2015; Ndletyana, 2014). Later studies on the Black middle class focused on urban populations and centred their conception of the Black middle class through the lens of income and occupation, with an emphasis on managerial

and professional categories (Crankshaw, 1997; Rivero, Du Toit, & Kotze, 2003; Seekings & Nattrass, 2006). After 1994, popular conceptions of Black middle classness centre income, occupation and education (Visagie, 2013). Regardless of the measure used, they are not void of challenges.

The main challenge associated with using these traditional indicators of socio-economic and class status to define the Black middle class arises when scholars seek to make cross-racial, cross-national and global comparisons. From a racial perspective, this becomes problematic because of the large racial disparities in education, income, occupation and wealth that exist between Blacks and Whites (Burger et al., 2015; Carter, 2005; Collins, 1997; Darity & Mason, 2004; Zoch, 2015). From a national and international perspective, the challenge is when trying to compare the historical and contextual differences of these traditional measures.

When looking more closely at traditional measures of class, there are substantive limitations to such measures. Studies that focused on education have typically specified, at least, a bachelor's degree (Posel, 2010; Southall, 2016). In terms of income, researchers have relied upon an income range as well as median household income to determine middle class status (Burger, Steenekamp, Van der Berg, & Zoch, 2014). Income definitions meet with the most contestation, as some tend to lump lower classes with the middle class. For example, Ndletyana (2014) contends that income definitions lack nuance as they fail to include education and middle class lifestyles. Middle class occupations have been assessed based on blue-collar versus white-collar professions (Crankshaw, 1997; Landry, 1987; Rivero et al., 2003; Seekings & Nattrass, 2006; Wilson, 1978). Racial wealth disparities have a stubborn and persistent stronghold on South Africa, with Whites holding most of the wealth. It is clear from the social science literature that education, income and wealth are imperfect measures because