

Social Strata in Lithuania and Its Development Tendencies

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Summary

The article reveals the conception of social strata (class). The main features of social strata are singled out and the necessity to distinguish it is emphasized. Theoretical issues of society stratification in foreign countries are discussed in the article as well. Analysis of social strata characteristics was carried out and tendencies of its changes were identified according to the authors' selection criteria and thresholds within social strata of Lithuanian population. Research reveals that middle class in Lithuania is irrational and development of social strata in society is not moving towards social homogeneity.

Keywords: social structure of society, social strata, middle class, minimal normative consumption budget.

Introduction

Scientific problem, novelty and relevance of the article. For a long time in Lithuania the questions have been raised about stratification of population, what different social strata are in regard to their social, economic, demographic and other features, and whether the middle class in Lithuania exists. We have very little objective information on peculiarities and tendencies of changes within middle class in Lithuania. Conclusions, as a rule, are based not on accurate calculations, but on the data of polls that are carried out by various institutions and on the assessments of participants how they live and with which social strata they identify themselves. However, a clear tendency has been noticed that even respondents who have different incomes very often equally treat their social status. Besides, the data of surveys cannot be considered objective, as in Lithuania people very often feel ashamed to recognize themselves as pauper.

Institute of Labour and Social Research carried out two longitudinal researches in 2001 and in 2003 under investigation of one of the authors of the article "Survey of the population income, expenditure and taxation with regard to social-economic stratification" where questions of middle class formation during 1998-2002 in Lithuania were investigated. The results of the survey have been published in scientific literature (Pajuodiene, Sileika, 2001) and presented at the conference (Sileika, 2002). Later on a re-

search on social strata of Lithuanian population, combining objective and subjective indicators, was carried out in 2005 (Matulionis, 2005).

Analysis of social strata of society is important when creating socially responsible society as it allows identifying whether evolution is towards social homogeneity, that is, whether the highest and the lowest classes are shrinking and middle class is expanding. Besides, it is important to know what part of society the middle class comprises, which is considered to be a guarantee of social stability. The weakness of the middle class poses a serious threat to the civil society and to the development of democracy. However, the social and economic policy of Lithuania still is not directed towards strengthening and broadening of this class.

When analysis of social stratification in society is carried out, then the most common features are identified, strategic trends and measures of socio-economic policy improvement in the field of population income, taxation, employment, business conditions, education and science, health care and in other fields can be anticipated.

Research object: social strata (classes) in Lithuania.

Research aim: to investigate the peculiarities of social strata in the Lithuanian population and to carry out the analysis of social strata development.

Research objectives:

1. To reveal the concept of social strata and criteria of social stratification.
2. To discuss the theoretical issues of society structuring in foreign countries.
3. To analyze the peculiarities and trends of social strata in Lithuanian society.

Research methods: systematic analysis of socio-economic literature, generalization method, comparative and logical analysis and other analytical methods.

Theoretical issues of social strata

The analysis of the vertical structure of the society is most often carried out using two basic con-

cepts: social class and social strata¹. The concept that has been shaped throughout history and used to describe vertical bunching of society is related to the origins of social differentiation and inequality (Rogers, Wright, 2010). Social class in the broadest sense is a group of people with the same social status (Pajuodiene, Sileika, 2001). This concept was used more widely for the first time in the nineteenth century as replacement of the concept “rank” when talking about hierarchical distribution of society. Great technical advancement in society in XVIII-XIX centuries such as the industry growth and the fast increasing in number of inhabitants in urban areas had big influence on formation of social class (strata) (Encyclopaedia Britannica).

Different authors provide different criteria for classifying the society into social classes. Some authors emphasize the following key features of a social class (Pakistan Study Group, 1966): income inequality exists among different social classes and usually representatives of upper social class have higher income. Income inequality also exists between the different occupations (employees) of the same social class, individuals that belong to the upper class have more independence and freedom of decision making at work, and they are more respected than representatives of the lower class. Authors refer to different working conditions – representatives of the upper class are not always satisfied with little autonomy at work they have, while the lower class faces health problems because of hazardous working conditions and have higher risk of accidents at work; at the same time social class status has influence on the way of life (lifestyle includes people’s tastes, preferences and expectations, and general life style).

Geiger (1932) distinguishes the following dimensions of social differentiation – a branch of employment, occupational status, income level, education.

Parsons (1953) singles out membership in the tribal group, through birth or marriage, personal characteristics (gender, age, beauty, intelligence, and strength), property, prestige, power.

According to Bourdieu, criteria of society’s social differentiation is based on the content of the capital: economic capital – through income and skills; cultural capital – through training and education (Bourdieu, 1984), social capital – through culturally, economically and politically meaningful relationships that help the actor to keep current social status (Bourdieu, Wacquant, 2003) and, finally, symbolic capital – it covers everything that has value in the society: presti-

¹ The concepts of social class and social strata are used as synonyms in this article. According to some authors, the difference between social class and social strata is mainly that the latter highlights different reasons of social structuring (Braziene, 2005).

ge, reputation, honour (Bourdieu, 1984). According to Bourdieu, unequal distribution of capital forms among members of society leads to social stratification. There is not only a variety of social differentiation criteria, but also a variety of different social classes. Classical models of social stratification consist of three social classes (highest, middle, lower). Giddens indicates the class structure of society consists of: the rich upper class, middle-class of qualified workers and the lower class of manual labour worker (Giddens, MacKenzie, 1982).

The highest social class is often referred to as elite. Elite is the peak of society, different from the rest of environment. That is description of strata or group of people with exceptional personal and professional qualities that make them favoured in a given life sphere of society (Pakistan Study Group, 1966). According to experts of elitology, the elite can be understood in two ways: as the most talented and experienced leaders in their field, or as a small group of people occupying important positions and with enormous power in its hands. The representatives of the highest social class are possessors of large property, receive high income and this enables them to create their own lifestyle, to influence the economic and political decisions, to provide better education for their children and to guarantee economic self-sufficiency (Encyclopaedia Britannica). Talking about the structure of society, Bourdieu defines elite as persons having the biggest part of economic, cultural, social and symbolic capital. He distinguishes consistency and proportionality of different capital forms as the most important aspects of elite. In other words, elite is comprised by persons who are famous not only as having unlimited economic resources, but also famous for their erudition, exceptional abilities, as well as being recognized actors in society (Genys, 2009).

The analysis of various literary sources allows considering that middle class in contemporary modern societies has the following features (Pajuodiene, Sileika, 2001):

- the middle class is the entirety of social groups (strata), which occupies an intermediate position between the lower and upper strata in society, for this reason it is a certain social mediator;
- the middle class is a part of society, dominated by relatively high level of education, high professionalism, socially active population. Middle class is viewed here as having a function to be the agent of social, economic and technological progress;
- the middle class is a part of society characterized by relatively high level of wealth. This is a guarantee for the personal economic independence and the freedom to choose activities; it enables to keep current life style, to feel satisfaction with the present

and to be sure about future. This leads to a middle-class function of a maintainer of social stability in society;

- the middle class, especially in economically developed Western countries, constitutes a major segment of the population. This enables it on the one hand to be a “carrier” of public interest, on the other hand it becomes a “carrier” of life style, national cultures that are characterized by specific social values inherent in societies which are recognized and have respected standards of behaviour.

Some authors distinguish even three main sectors of middle-class (Giddens, MacKenzie, 1982): “the old middle class”, which consists of small business owners in production, trade or services and agriculture sectors; “the upper middle class”, which consists mainly of management personnel, “the lower middle class” – even more differentiated entity, comprising a variety of people working as staff employees, trade agents, teachers and nurses.

Multiple class models are also being developed. Some authors identify as many as 12 classes, for instance, the top of the highest, the middle of the highest, the lower of the highest, the upper of the lower; the middle of the lowest, the lowest of the lower, etc.; others limit it to five classes: the highest, upper, middle, lower, and the lowest, considering that the five classes model more precisely reflects the specificity of post-communist society, where the structure is still in a period of rapid change (Matulionis, 2005).

One of the first social classes models has been developed in 1949 by a sociologist Warner in the book titled “Social Class in America”. For many decades, Warner theory dominated the sociological theory of the USA. Based on social anthropology Warner divided Americans into three main classes: the highest, middle and the lowest (Levine, 2006). The following classes were divided further into sub-strata: upper and lower (see Table 1).

Table 1

Warner W. L. social structure model of society

The highest class	higher sub-stratum	Persons who came from wealthy and noble family, inherited a large property.
	lower sub-stratum	Persons who have acquired the property on their own (businessmen, film and sports stars).
Middle class	higher sub-stratum	Specialists with higher education, usually with a master’s degree (doctors, dentists, lawyers, bankers, enterprise managers, lecturers, scientists, pharmacists, airline pilots, ship captains, senior civil servants, politicians and military officers, architects, artists, writers, poets and musicians).
	lower sub-stratum	Employees with lower salary who have completed higher education, usually with a bachelor’s degree (police officers, firefighters, primary and secondary school teachers, engineers, accountants, nurses, urban office workers and low to middle ranking civil servants, trade representatives, clergy, small business owners).
The lowest class	higher sub-stratum	Manual workers.
	lower sub-stratum	Homeless, long-term unemployed and employed, but poor.

Source: composed by the authors with reference to Levine (2006).

From the results in Table 1 it can be seen that, according to Warner, Americans’ distinction between social classes is based more on social than on material status in society: the richest people in America can be attributed to the highest class lower sub-stratum, as many of them have built property on their own, and a representative from the highest class higher sub-stratum can only be born in it, the represen-

tatives from the lowest class higher sub-stratum can earn more than the representatives from the lower sub-stratum of the middle-class (e.g., manufacturing worker can earn more than a secretary).

Sociologists Coleman and Rainwater developed a model of society structure, composed also of three social classes, each comprises two or three sub-classes (see Table 2).

Coleman R. and Rainwater L. social structure model of society

The highest class	Higher subclass	Individuals belonging to this subclass are usually graduates of the oldest and famous American universities (Brown, Columbia, Cornell, Dartmouth, Harvard, University of Pennsylvania, Princeton, Yale) and inherited a large property.
	Lower sub-class	“Success elite”, composed of the best experts and senior business executives. Individuals belonging to this subclass usually have completed college level or higher education.
	The lowest sub-class	Specialists and consultants with acquired higher education.
Middle class	Middle subclass	Lowest-level managers, small business owners, lower-ranking professionals (accountants, teachers), sales and clerical staff. Individuals belonging to this subclass usually have completed college type schools or secondary education.
	Manual workers subclass	Higher level workers (handymen, truck drivers), sales employees and clerical staff belongs to this subclass.
The lowest class	“Poor” subclass	Individuals belonging to this subclass have not completed secondary education and belong to unskilled labour force.
	“Under margins” subclass	Those who are unemployed and live on social benefits. Individuals belonging to this subclass have not completed secondary education.

Source: composed by the authors with reference to Gilbert (2008); New World Encyclopaedia.

Gilbert divides society into five social classes, and he divides the middle class into two sub-strata. Model of Gilbert highlights the sources of income and that household income depends on the number of

people earning that income, which differs substantially between social classes. The model of Gilbert is given in Table 3.

Table 3

Gilbert D. social structure model of society

The capitalist class	Persons whose main source of income is the return on assets.
Higher middle class	Specialists with higher education. They have great freedom in work and have ensured their economic security.
Lower middle class	Skilled workers able to perform complex tasks at work. They earn enough to live comfortably.
Manual workers class	Persons less qualified than the representatives of the middle class, usually carry out more routine tasks at work. Work of these individuals gives them relatively stable income to ensure the normal standard of living.
Employed but poor class	Low-skilled workers, service sector employees, operators receiving low pay. Their income is sufficient only for the minimum living standards.
The lowest class	The persons having no stable work and living from social benefits.

Source: composed by the authors with reference to Gilbert (1998).

Russian scientists have identified four social strata (Pajuodiene, Sileika, 2001). According to them, big and medium businessmen belong to the upper strata, middle and small businessmen, “pseudo” businessmen, consultants of industrial and social spheres, career specialists, manual workers elite and senior military officers fall into middle strata, the basic strata consists of mass intelligentsia (specialists), “semi” intelligentsia (assistants of specialists, technical staff), sales and service staff, medium-skilled workers, peasants, and, finally, in the lowest strata unqualified labour force is represented. Zaslavskaja and Gromov, the authors of that conception, note that these four so-

cial classes show only a “grand” society. Meanwhile, outside there is also the fifth strata – social “bottom” characterized by asocialization, by loss of legitimate public life habits and in general isolation from the ‘big’ public institutions.

In summary, it can be stated that social strata (class) is considered to be a group of people with the same socio-economic status. The main features of the social strata (class) are: among different social classes exists income inequality; individuals belonging to a higher class have more independence and freedom of decisions at work, they have different occupations and working conditions. Thus, the main cri-

teria for defining social class, in the opinion of most authors, are the income and occupation, which are determined, as a rule, by a relevant education. However, as we have seen, different authors, even in the same state, use different stratification system of society. This is due to the lack of uniform criteria according to which the society could be divided into social strata.

Research methodology

In order to investigate the social structure of Lithuanian society, two indicators have been used, which are the criteria of economic capital that manifests through the consumption level and the cultural capital that is described by the level of education. Sub-strata were distinguished referring to the cultural capital inside social strata, that is, by education of household head: population with the head of household who has completed secondary education is ascribed to the sub-stratum I, and population with higher or college education is ascribed to the sub-stratum II.

In determining the thresholds of social class, average monthly income to make ends meet (physical, spiritual or intellectual, and social) per capita per month calculated by Statistics Lithuania have been used as an indicator. Based on this value four social strata were identified: lower, intermediate (between lower and middle), middle and upper.

Persons whose consumption expenditure is 50% lower than the average monthly income to make ends meet were assigned to lower social strata. This value can be based on the results of research that was carried out by one of the authors of the article and that deal with methodological issues of Lithuanian po-

pulation stratification. Research results show (Pajuodiene, Sileika, 2001) that the upper threshold of the lower social strata is in accordance with the minimum consumption budget (MNCB), which defines the minimal level of satisfying indispensable physical needs that, in the opinion of the society, ensures minimal subsistence conditions for one person undertaking a job that is not harder and more difficult than an average one. MNCB calculated referring to the minimum value of a normative food bundle (LTL), which counts for 50% of weight of the total MNCB set (minimum set without food must ensure minimum needs of a person such as clothing, footwear, household inventory and services).

Consumption expenditures of middle strata have to be not smaller than the lowest monthly income to make ends meet as calculated by Statistics Lithuania. Thus, between lower and middle strata naturally occurs intermediate strata, because the upper threshold of the lower social strata, defined by MNCB, is significantly lower than the income estimated by the Statistics Lithuania to meet habitual needs.

The upper threshold of middle social strata could be 1.5, 1.75 or 2 times bigger consumption expenditure per person than the average monthly income to make ends meet. Answering the question about what proportion of upper and lower threshold of middle strata should be is quite difficult. The provision that the population income attributed to the middle class may differ no more than 1.5 times is insufficient; the more acceptable difference is 1.75 or 2 times. In order to maintain certain homogeneity of the middle strata, as it can be seen from Table 4, 1.75 ratio difference of lower and upper threshold has been chosen for this study.

Table 4

Thresholds of social strata identification

Social strata	Thresholds			Ratio by times of upper and lower thresholds
	Lowest monthly income to make ends meet (per household member), %	Consumption expenditure (per household member), LTL		
		2004	2008	
Lower	up to 50	up to 295	up to 443	...
Intermediate	50-100	295-589	443-886	2
Middle	100-150	600-1031	887-1551	1.75
Upper	more than 150	more than 1031	more than 1551	...

Source: composed by the authors with reference to the data of Statistics Lithuania.

It is considered that households the consumption expenditure per household member of which exceeds the middle strata threshold are attributed to the upper social strata.

Trends of changes in social strata of the Lithuanian population

The intermediate strata accounted for the largest part of Lithuanian society in the analyzed period.

Less than half of the population was in that strata. Less than one-third of the population constituted middle social class. The rest were distributed as follows: almost one-sixth accounted for the lower social class and a little more than one-eighth were attributable to the upper strata (see Table 5).

Strata and sub-strata of the Lithuanian population in 2004-2008

Social strata and sub-strata	Distribution of household members, %					Average standard in 2004-2008
	2004	2005	2006	2007	2008	
Upper	11.1	12.4	12.4	14.4	9.2	11.9
Upper I	2.8	3.5	3.4	4.8	2.8	3.5
Upper II	8.3	8.9	9	9.6	6.4	8.4
Middle	26.9	26.8	26.9	27.8	26.8	27
Middle I	10.4	11.3	10.2	11.6	10.6	10.8
Middle II	16.5	15.5	16.7	16.2	16.2	16.2
Intermediate	44.1	43.5	43.6	42.7	44.7	43.7
Intermediate I	25.3	25	24.4	23.6	24.3	24.5
Intermediate II	18.8	18.5	19.2	19.1	20.4	19.2
Lower	17.9	17.3	17.1	15.1	19.3	17.3
Lower I	13.3	12.9	12.7	11.4	13.5	12.7
Lower II	4.6	4.4	4.4	3.7	5.8	4.6
Total:	100	100	100	100	100	100

Source: composed by the authors with reference to the data of Statistics Lithuania.

As shown in Table 5, uneven changes have been taking place in the social strata within the past five years: the most significant changes were noticed in 2008, when lower social stratum that has been declining every year until 2008 has risen by 4.2% compared with 2007, while the upper stratum that has been growing every year (except 2006, when the upper strata remained unchanged compared with 2005) in 2008 decreased by 5.2%. On the one hand, decline in people belonging to the lowest class until 2008 could be regarded as a positive trend of social stratification; on the other hand, decreasing growth of the lower social stratum at the expense of its upper stratum growth means that the social development of society is not moving towards social homogeneity.

The middle social stratum of Lithuanian society in 2008, compared to 2007, decreased by 1%, compared with the base period of 2004 – by 0.1%. Thus, during the period of middle stratum under investigation there have been no changes noticed in terms of positive development in society. On the contrary, the situation deteriorated.

Dynamic changes in the intermediate social stratum until 2008 did not constitute a percent and in 2008, compared with 2007, this stratum has increased by 2%, but compared to the reference period – only by 0.6%. To summarize, it can be assumed that the intermediate and middle social strata have been more stable during the analyzed period, that is less varied, to one or other direction than the upper and lower social strata.

The biggest changes in distribution of population among social strata in 2008 may be associated with the changes in economic situation in the world

and in Lithuania. The economic downturn reduced population income, and this had contributed to the social growth of the lower and the intermediate strata, and to the middle and the upper becoming weaker.

The analysis of the social strata sub-strata dynamics shows that the smallest changes each year during the investigation period have been noticed in the sub-stratum I of intermediate stratum. The annual changes in this sub-stratum in 5 years of the investigation were less than 1%. The biggest average annual change during the investigation period was recorded in the sub-stratum II of upper stratum (drop by 3.2%).

The distribution of households in 2004-2008 shows that, on the one hand, there is direct relationship between education of the household head and achieved socio-economic status of the household: sub-stratum I where the education level of household head is lower dominate primarily the lower and intermediate strata, and sub-stratum II dominate the middle and upper social strata. On the other hand, higher education of the household head does not guarantee relevant socio-economic status. Households where the household head has completed higher or college level education and has not managed to achieve middle and upper social strata account for bigger part than those who managed to achieve those social strata when the head of the household had secondary education. In 2004-2008 lower and intermediate sub-strata II accounted for 23.8% on average, while the middle and upper ones – for 14.3% (see Table 5).

It is obvious that the core of the middle social strata is its sub-stratum II, in which the heads of the households have higher and college level education.

It should be noted that the part of this sub-stratum in 2004-2008 decreased by 0.3%. Its part in the structure of middle class population also decreased from 61.3% in 2004 to 60.4% in 2008. Therefore, considering separately, trends of sub-stratum II of middle strata over the period investigated also cannot be regarded as positive. At the same time, attention is drawn to that part of sub-stratum II (60.4% of middle strata) essentially reflects the degree of crystallization – compliance with both income and educational criteria is achieved at this sub-stratum.

Analysis of the social structure of Lithuanian population allows to state that about middle class in Lithuania, as it is understood in economically developed Western countries, we can speak only as about an irrational phenomenon. The criteria of middle class according to its form mainly match the sub-stratum II of the middle class, although it also cannot be called pure middle class. The main weakness are the lack of massiveness (on average only 16.2% of Lithuanian population fell into sub-stratum II of middle social class in 2004-2008) for the sub-stratum to be capable of performing its role as a middle-class – to be a guarantee of stability of the country’s social, economic, and political developments. It is important to note that the biggest part that falls into this category is just

a little beyond the lower middle social strata threshold. In Western countries, higher education, despite the kind of work that a person does according to his occupational qualifications, shifts him to the middle class, constituting, as a rule, about two-thirds of the society, and in Lithuania quite a lot of educated people are just a little above the poverty level.

All this let us maintain that the middle class in Lithuania is only developing at the moment.

A similar conclusion has been made by one of the authors of this article about some ten years ago when 14.1% of people fell into strata II of middle strata in 1998 (Pajuodiene, Sileika, 2001). That allows us to state that in regard to stratification process, the development of social and economic policy of the country after the restoration of independence is evaluated negatively.

Analysis of socio-demographic characteristics of social strata of Lithuanian population

According to the socio-economic group (and often according to other groups) intermediate strata is the most accurate picture of population. The share of household members of socio-economic groups at extreme strata (lower and upper) varies from 1.4 to 3.3 times (see Figure 1).

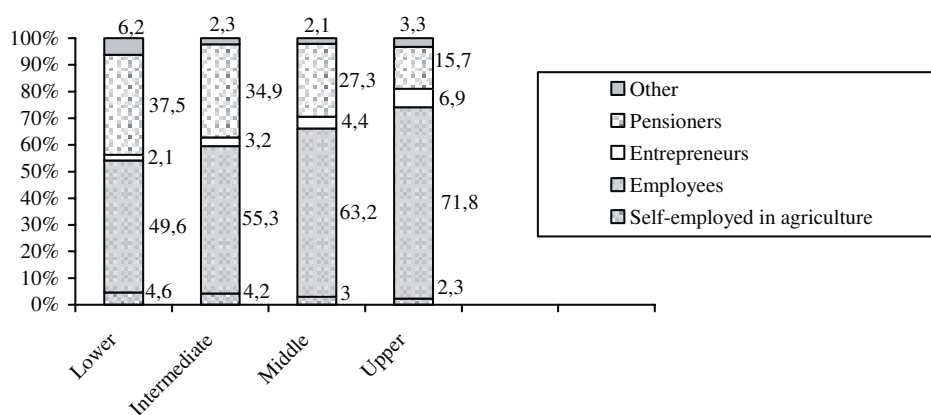


Fig. 1. Average distribution of population in social strata by socioeconomic group of households in 2004-2008

Source: drawn by the authors with reference to data of Statistics Lithuania.

As it is seen from Figure 1, employees accounted for the biggest part of the population in all social strata, the smallest part in lower strata was entrepreneurs, in the intermediate – others and entrepreneurs, in the middle and upper – self-employed in agriculture and others. In fact the higher the social stratum, the greater part of it consists of entrepreneurs and employees, and the lower part – of self-employed in agriculture and pensioners.

Analysis has shown that compared with the base period (2004), in 2008 the number of self-employ-

ed in agriculture has dropped by 0.8% - 1.8% in all social strata. That was due to a decrease of self-employed in agriculture in overall population structure. The self-employed in agriculture accounted for 4.3% of the total population in 2004, but in 2008 they constituted only 2.7%. However, share of the employed in 2008 compared with the base period increased in all social statuses by 1.8% - 5.3%, with an exception of the upper strata. The share of pensioners in the upper and lower social strata in 2008, compared with the base period, increased by 4.7% and 1.8%, whi-

le in the intermediate and the middle ones – decreased by 4.6% and 1.3%. The share of entrepreneurs in the middle and intermediate strata in 2008, compared with the base period, increased by 1.2%. The change in share of entrepreneurs in other social classes was smaller.

The changes in composition of social classes by household type have been noticed. The higher the social strata, the higher the proportion of single persons, single persons with children, and couples without children and the lower proportion of couples with children and other households with children (see Figure 2).

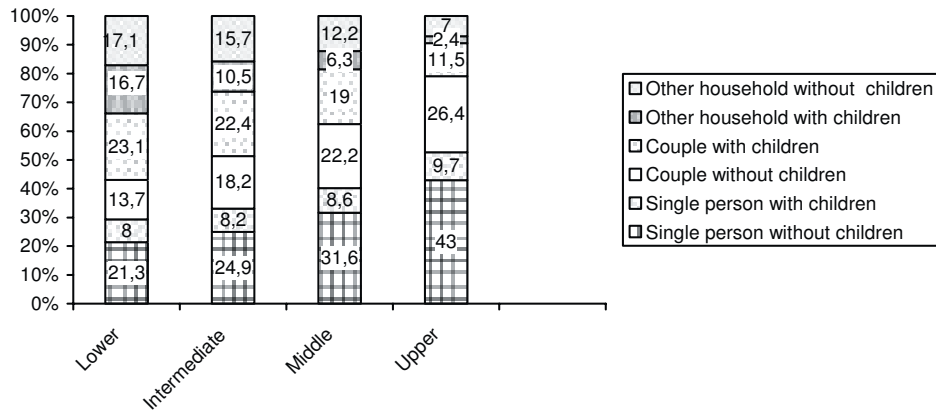


Fig. 2. Average distribution of population by household type in social strata in 2004-2008
Source: drawn by the authors with reference to the data of Statistics Lithuania.

As it is shown in Figure 2, households of single person without children comprise the biggest share in all social strata (excluding lower social class, where the biggest share is comprised by households of couples with children), while the smallest share is of single person with children (in lower and intermediate strata) and of other households with children (in middle and upper strata). The ratio between the highest and the lowest social strata of households was increasing: in the lower and intermediate strata it reached on average three times, in the middle – 5, and the upper – even 18 times.

The analysis of changes in population distribution by household type in social strata shows that in 2008, compared with the base period (2004), the num-

ber of single persons within social strata decreased the most (6.5%-10.4%), and the biggest increase in numbers has been noticed in the middle strata in other household with children, the share of households with children increased the most in the lower strata (3.6%), in the middle and intermediate the greatest increase was in other households without children (6.8% and 5.4%, respectively), in the upper – share of couples without children (8.1%).

Analysis shows big differences in the composition of social strata by the place of residence. The higher the social strata, the greater the role played by inhabitants living in urban areas and the lesser – by those living in rural areas (see Figure 3).

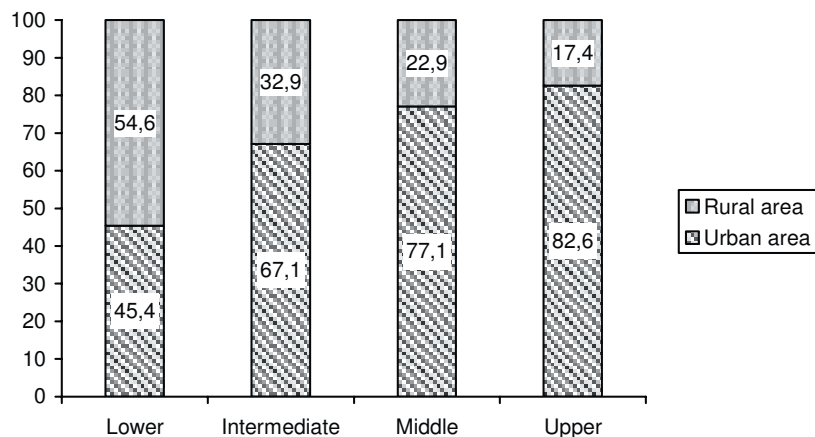


Fig. 3. Average distribution of population by place of residence in social strata in 2004-2008
Source: drawn by the authors with reference to the data of Statistics Lithuania.

Figure 3 reveals that in the lower strata the rural population accounted for more than a half of all people, in the intermediate strata they accounted for one third, while in the middle and upper strata – for 22.9% and 17.4%, respectively.

Analysing the dynamics of place of residents by population in social strata it is revealed that in 2008 (compared with the base period of 2004) the number of population living in urban area increased in the lower and intermediate social strata by 10.2% and 2.9% respectively, and in the middle and upper

social strata it decreased by 1.0% and 5.7%. Decrease in share of population of upper and intermediate strata living in rural area and increase in middle and upper indicates that distribution of society by place of residence during an investigation period tended to become more similar.

Social class characteristics show that the higher the social strata (except the middle one), the more often the man is the head of the household (see Figure 4).

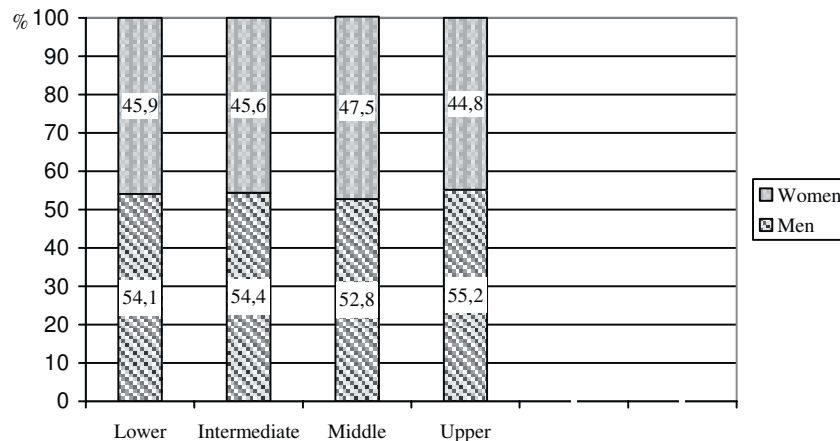


Fig. 4. Average distribution of population within social strata by gender in 2004-2008
Source: drawn by the authors with reference to the data of Statistics Lithuania.

As Figure 4 shows, the most even distribution by gender in the household and the lowest share of households where head of household is a man have been noticed in the middle social strata in 2004-2008. The lowest share where the head of the household is a woman during the investigation period has been noticed in the upper strata. Analyzing the changes in distribution of population by gender in the household within social strata it has been estimated that in 2008 compared to the base period, the share of households where the head is a man increased in upper social strata by 15.3% (respectively, the number of households where the head is a woman decreased). In other social strata the changes in this indicator in 2008 compared to 2004 were similar and amounted to 2.4%-2.9%.

Conclusions and recommendations

1. Social classes (strata) are distinguished in order to analyze the vertical structure of society. Social class in its broadest sense is a group of people sharing the same social status. Concepts of social class and social stratum are used as synonyms. There are no uniform criteria according to which society should be divided into social strata. For that reason different authors (even in the same country) use different stratification of society. In the works by American scientists

(Warner, Coleman, and Rainwater) the distinction between social classes is based more on their social rather than on material status in society.

Numani and Behdad stratify society by the criteria of asset, competence and power.

In the opinion of Russian scientists Zaslavskaja and Gromova, the criterion for social stratification is occupation. Special literature provides even such criteria as financial or material dimension, education and qualification, activity area, membership in a relationship group through birth or marriage, personal qualities, prestige, power, culturally, economically and politically meaningful relationships, etc.

2. The authors of the article state that the essential criteria for defining a social class (stratum) are the income and occupation, determined, as a rule, by relevant education. Based on these criteria, four social classes have been identified in Lithuanian social structure: lower, intermediate, middle, and upper. Each of these comprises two sub-strata based on different cultural capital: population including household head with secondary education (sub-stratum I), and that including household head with higher or college level education (sub-stratum II).

3. The intermediate stratum (class) accounted for the biggest share of population in 2004-2008. A little less than a half of the population of Lithuania fell

into this class. Almost a third of the population belonged to the middle social stratum, and almost a sixth constituted the lower social stratum and an eighth made up the upper stratum. The trend in the population stratification was found that until 2008 the share of the lower social stratum in the structure of society was decreasing, while its upper part was expanding. Dynamic changes in intermediate and middle social strata were insignificant until 2008. Due to a changed economic situation in Lithuania and in the rest of the world in 2008 increased share of lower and intermediate strata in the structure of society was noticed, while in the middle and upper it declined. This shows that the development of society was not moving towards social homogeneity.

4. In Lithuania about the middle class, as it is understood in economically developed Western countries, we can speak as about irrational phenomenon only. Referring to its shape the criteria of middle-class are more consistent with the second sub-stratum of the middle social stratum, but it still cannot be called a real middle class. Its weakness are the lack of massiveness (on average only 16.2% of Lithuanian population belonged to the second sub-stratum of the middle social stratum in 2004-2008) that is necessary for the sub-stratum to fulfil its function as a middle-class – to be a guarantee of social, economic, and political development.

Therefore, it allows concluding that in Lithuania the formation of the middle class is only underway. Analogous conclusion has been made by one of the authors of this article some ten years ago, when 14.1% of the population fell into sub-stratum II of the middle social stratum in 1998. This allows concluding that in terms of stratification development of socio-economic policy cannot be evaluated as positive.

5. Employees account for the biggest share of people within all social strata, while the entrepreneurs account for the smallest share in the lower stratum, entrepreneurs and other in the intermediate, self-employed in agriculture and others – in the middle and upper. The higher the social stratum, the greater part of it consists of entrepreneurs and employees, and the lower part – of self-employed in agriculture and pensioners.

6. Households with single persons account for the biggest share within all social strata (lower social stratum is an exception where households of couples with children account for the biggest share), the smallest share is made up by households of single persons with children (lower and intermediate) and other households with children (within middle and upper social strata).

7. Within all social strata (except for the lower social strata) the biggest share of population lives in urban area. The higher the social stratum, the bigger

share of population lives in urban area and the smaller in rural area. However, the distribution of population by place of residence within social strata under investigation period had a tendency to become more even.

8. Households where the head was a man accounted for the biggest share in all social strata. The lowest share of households where the head was a man and at the same time where during the period analyzed households distributed most evenly was within middle social strata.

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Socialiniai sluoksniai Lietuvoje ir jų raidos tendencijos

Santrauka

Objektyvios informacijos apie Lietuvos vidurinėsios klasės ypatumus ir kitimo tendencijas beveik nėra; išvados paprastai daromos remiantis ne patikimais apskaičiavimais, o apklausų, kurias rengia įvairios institucijos, dalyvių vertinimais, kaip jie gyvena ir kokiam visuomenės sluoksniui save priskiria. Tačiau išryškėjo akivaizdi tendencija, kad respondentai, turėdami gana skirtingas pajamas, neretai vienodai traktuoja savo socialinę padėtį. Remiantis objektyviais duomenimis, Darbo ir socialinių tyrimo institutas 2001 ir 2003 m., vadovaujamas vieno šio straipsnio autorių, analizavo Lietuvos vidurinėsios klasės formavimąsi 1998–2002 m. „Gyventojų pajamų, išlaidų ir apmokestinimo tyrimuose socialinės-ekonominės stratifikacijos požiūriu“. Tolesnį Lietuvos gyventojų socialinių sluoksnių tyrimą, derindamas objektyvius ir subjektyvius rodiklius, 2005 m. atliko A. Matulionis.

Gyventojų socialinių sluoksnių analizė yra svarbi kuriant socialiai orientuotą visuomenę, nes leidžia nustatyti, ar raida vyksta socialinio vienalytiškumo kryptimi, t. y. ar aukščiausioji ir žemiausioji visuomenės klasės mažėja, o vidurinioji klasė didėja. Be to, svarbu žinoti, kurią visuomenės dalį sudaro vidurinioji klasė, kuri yra laikoma visuomenės stabilumo garantu. Socialinė ir ekonominė valstybės politika iki šiol nėra orientuota į šios klasės stiprinimą ir plėtimą.

Tyrimo tikslas – ištirti Lietuvos gyventojų socialinių sluoksnių ypatumus ir atlikti socialinių sluoksnių raidos analizę.

Tyrimo uždaviniai:

1. Atskleisti socialinių sluoksnių sampratą ir socialinės stratifikacijos kriterijus.
2. Aptarti visuomenės struktūravimosi užsienio valstybėse teorinius klausimus.
3. Išanalizuoti Lietuvos gyventojų socialinių sluoksnių ypatumus ir kitimo tendencijas.

Tyrimo metodai: sisteminė socialinės-ekonominės literatūros analizė, apibendrinimo metodai, lyginamoji, struktūrinė ir loginė analizė bei kiti analitiniai metodai.

Socialinė klasė plačiausia prasme yra žmonių grupė, turinti tokį pat socialinį statusą. Nors socialinės klasės ir socialinio sluoksnio sąvokos skiriasi, tačiau šiame straipsnyje jos vartojamos kaip sinonimai. Pagrindiniai socialinių klasių (socialinių sluoksnių) bruožai yra šie: tarp skirtingų socialinių klasių egzistuoja pajamų nelygybė; asmenys, priklausantys aukštesnei klasei, darbe turi daugiau nepriklausomybės ir sprendimų laisvės; skirtingos jų profesijos ir darbo sąlygos. Taigi pagrindiniai kriterijai, apibūdinantys socialinę klasę, yra pajamos ir profesija, sąlygojami atitinkamo išsimokslinimo. Svarbu pažymėti, kad skirtingi autoriai net toje pačioje valstybėje visuomenę stratifikuoja skirtingai. Taip yra dėl to, kad nėra vieningų kriterijų, pagal kuriuos galima skirstyti visuomenę į socialinius sluoksnius.

Klasikiniai socialinės stratifikacijos modeliai yra sudaryti iš trijų socialinių klasių (aukščiausios, vidurinėsios ir žemiausios). Aukščiausia socialinė klasė dažnai vadinama elitu. Taip apibūdinamas sluoksnis ar žmonių grupė, kurie pasižymi ypatingomis asmeninėmis ar profesinėmis savybėmis, darančiomis juos „išrinktaisiais“ tam tikroje visuomenės gyvenimo sferoje. Vidurinioji klasė – tai socialinių grupių (sluoksnių) visuma, kuri užima tarpinę poziciją tarp žemutinių ir aukštutinių visuomenės sluoksnių; šiam sluoksniui būdingas ganėtinai aukštas gerovės lygis. Šiuolaikinėje visuomenėje šis 3 klasių modelis nėra tinkamas, todėl yra kuriami „daugiaklasiai“ modeliai.

Šio straipsnio autoriai motyvuoja, kad pagrindiniai kriterijai, apibūdinantys socialinę klasę (sluoksnį), yra pajamos ir profesija, sąlygojami atitinkamo išsimokslinimo. Remiantis šiais kriterijais straipsnio autoriai Lietuvos socialinėje struktūroje išskyrė 4 klases: žemutinę, tarpinę,

viduriniąją ir aukštutinę. Kiekvienoje jų išskirti ir du posluksniai pagal kultūrinį kapitalą: I posluksniui priskirti gyventojai su namų ūkio galvos išsimokslinimu iki viduriniojo imtinai, o II posluksniui – su aukštuoju ir aukštesniuoju išsimokslinimu.

Nustatyta, kad didžiausią Lietuvos visuomenės dalį 2004–2008 m. sudarė tarpinis sluoksniu (klasė). Į jį pateko šiek tiek mažiau nei pusė visų Lietuvos gyventojų. Beveik trečdalis gyventojų priklausė viduriniajam socialiniam sluoksniui, šeštadalis sudarė žemutinį socialinį sluoksnį, aštuntadalis – aukštutinį sluoksnį. Iki 2008 m. žemutinio socialinio sluoksnio dalis visuomenės struktūroje mažėjo, o aukštutinio didėjo. Tarpinio ir viduriniojo socialinių sluoksnių dinamininiai pokyčiai iki 2008 m. buvo neįdomūs. Dėl pasikeitusios ekonominės padėties Lietuvoje ir pasaulyje 2008 m. išaugo žemutinio ir tarpinio socialinių sluoksnių dalis visuomenės struktūroje, o viduriniojo ir aukštutiniojo sumažėjo. Tai rodo, kad visuomenės raida nevyko socialinio vienalytiškumo kryptimi.

Apie viduriniąją klasę, kaip ji suprantama ekonominiu požiūriu išvystytose Vakarų šalyse, Lietuvoje galima kalbėti tik kaip apie iracionalų reiškinį. Pagal savo formą vidurinėsios klasės kriterijus iš esmės atitinka tik viduri-

niojo socialinio sluoksnio II posluksnį, tačiau ir jo dar negalima vadinti teisėta viduriniąja klase. Silpniausia vieta – trūksta masiškumo.

Visuose Lietuvos gyventojų socialiniuose sluoksniuose daugiausia gyventojų sudaro samdomi darbuotojai, mažiausiai žemutiniame sluoksnyje – verslininkai, tarpiniame – verslininkai ir kt., viduriniame ir aukštutiniame – žemdirbiai ir kt. Lietuvos gyventojų socialiniuose sluoksniuose vyrauja vienišų asmenų namų ūkiai (išskyrus žemutinį socialinį sluoksnį, kuriame daugiausia sudaro porų su vaikais namų ūkiai), mažiausiai sudaro vienišų asmenų su vaikais namų ūkiai (žemutiniame ir tarpiniame sluoksniuose) ir kiti namų ūkiai su vaikais (viduriniajame ir aukštutiniame socialiniuose sluoksniuose). Aukštutiniame, viduriniajame ir tarpiniame socialiniuose sluoksniuose daugelis gyventojų gyvena mieste, žemutiniame – kaime. Tačiau gyventojų pasiskirstymas pagal gyvenamąją vietą socialiniuose sluoksniuose analizuojamu laikotarpiu turėjo tendenciją panašėti. Visuose socialiniuose sluoksniuose yra daugiau namų ūkių, kurių galva – vyras.

Pagrindiniai žodžiai: socialinė visuomenės struktūra, socialiniai sluoksniai, vidurinioji klasė, minimalus normatyvinis vartojimo biudžetas.

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