

Experience of research of social classes in Latvia

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The aim of the paper is to consider the situation with the social class stratification in Latvia. The focus is on the middle social class, due to the significance of this class both for the economic growth and the achievement of the sustainable, long-term development of the country. The subject of sociological research is the formation of class stratification in the region (estimated on the basis of cluster analysis), the main characteristics of the selected clusters based on the analysis of the volumes and structure of total resources and aggregate capital. In the conclusion of the article, the controversial issues of classes in modern societies are analyzed.

Keywords: class, middle class, aggregate capital, cluster

INTRODUCTION

The etacratric stratification of the Soviet society collapsed and broke up almost 25 years ago, but such a social stratification, which would be in compliance with all the principles and demands of the market economy, political democracy, social and spiritual progress, has not been formed yet. At present, we have a set of social groups that are difficult to differentiate: classification criteria for these groups are varied and unstable, and the mobility of some individuals is similar to the Brownian motion featured by a tendency to maintain the existing status, which is perceived by the participants of “the race” as a running on the spot.

The issues of social stratification are not mainstreamed by the Latvian sociologists. At the same time, without a thorough and reliable analysis of the state and dynamics of the social class structure the expert community cannot provide the authorities and the civil society with effective instruments and tools, which would meet the actual demands and possibilities of Latvia, so that the country could emerge from the systemic crisis. Moreover, a special attention should be paid to the middle class; it is primarily due to the significance of this particular class both for the economic growth and the achievement of the sustainable, long-term development of the country.

T. Parsons declared the importance of the hierarchical and particularly economic understanding of social inequality: “Some such broad classification as “upper” – carefully defined – “middle” and “lower” makes sense” (Parsons 2010). In other words, a sociologist interested in the hierarchy, at the same time, is interested in the forces that determine the dynamics of mobility, movement within the framework of the existing and rather stable system of social

inequality, where the economic criterion, though being the main one, does not completely determine the class status of a person (a family). "... class status is ... not a rigid entity – T. Parsons warned – but a fairly loosely correlated complex of elements ... The family–occupation–income complex is by and large the core of the wider complex" (Parsons 2010).

Classes are an economic category that at different times and in different circumstances can be supplemented by various non-economic elements. Although the concept of "social class" is often ideologized, it remains one of the basic concepts of sociology (Matulionis 2014). The task of a sociologist is to identify the strongest (here and now) elements of the phenomenon of "social class", which together with economic elements form a specific complex or, to make it more precise, a class cluster.

MODERN THEORETICAL LEVEL OF CLASS STRATIFICATION

There is a variety of approaches – from the claims that class differences have been overcome to the absolutization of economic criterion. In our opinion, the research carried out in the UK for BBC is the most interesting and innovative one (Huge Survey... 2013).

The most important aspects of the carried out research are the following:

1. Classes are defined by three parameters – economic (income, savings, property), social (communication and social networks) and cultural (interests and modes of pastime).

2. The previous division of society into three classes – working class, middle class, and upper class (by occupation, wealth and education of a person) – in the opinion of researchers, no longer reflects the real picture. At present, the British society has been divided into seven classes:

elite – the most privileged group in the UK, distinct from the rest through its wealth; it has the highest indicators in all three parameters;

established middle class – the most numerous group; it is the second wealthiest, scoring second highest for cultural capita;

technical middle class – a small, rather new group of people with high income, though it scores low for social and cultural capital. It is distinct from the rest with its social isolation and indifference towards culture;

new affluent workers – a young group of socially and culturally active people with medium income;

traditional working class – scores low for all forms of capital though it is not completely socially deprived. Its members have reasonably high dwelling values, explained by this group having the oldest average age at 66;

emergent service workers – a new, young, primarily urban group which is relatively poor, though it is socially and culturally active;

precariat, or precarious proletariat – the poorest and most deprived class among the abovementioned; it scores low for social and cultural capital. The researchers claim that this class makes up about 15% of the UK population.

3. The shrinking of the traditional (established) middle class (up to 25%), the formation of a blurred stratum between the traditional working and middle classes.

In our opinion, the new division of society into 7 classes reflects the inability of the state to continue the implementation of the policy of preservation and growth of the traditional middle class under the following conditions: the global economic crisis, a rather long period of accessibility of education (including higher education), a decline in the share of traditional industry, a widespread use (especially by the youth) of new technologies that provide mobility.

Moreover, it reflects the inability of the state to ensure the growth of social and cultural capital. At the same time, a subjective issue should be taken into account – how to relate those, who have a fairly high level of education and work mostly in the important sectors of the national economy, being socially and culturally active, to a “lower” class? Probably, the British sociologists found themselves facing the circumstance, when a pass into the middle class increasingly depends not on the ownership of the means of production and the formal level of education, but on a set of the resources, where the cultural element increasingly dominates.

By all means, in the societies, where there existed etacratric stratification, the situation with classes is even more complicated. For example, the article “Social Classes in Contemporary Poland” (“Klasy społeczne współczesnej Polski”) provides the following composition of social groups:

- germs of upper class (less than 2% including their families);
- class of managers – 4–8%;
- representatives of the liberal professions and middle class – 8–16% of the society;
- precariat – 74–87% (the selection criterion is the specificity of the work to be done or the amount of the received social transfers) (Krakauer 2013). Thus, in Poland, if compared with the British society, this segment of the society is about 5 times more numerous and its percentage makes up such a value, which has been recently used in respect to the middle class of economically advanced countries. For example, L. A. Belyaeva claims that in Norway the middle class approaches 90% of the population (Belyaeva 2011).

As we can see, the middle class, which is usually associated with the success of the development of the industrial and post-industrial society, is of particular interest to researchers. In the opinion of the majority of Western sociologists, the middle class acts as a major stabilizing force in the overall balance of the classes, the subject of modernization and creation of a new society of knowledge, the main consumers of high-quality products of the modern economy, the main carrier of a life strategy for success.

IN SEARCH OF THE MIDDLE CLASS IN POST-COMMUNIST COUNTRIES

The calculation of the share of the middle class in post-communist countries varies considerably depending on the criteria used and on their diversity.

Thus, according to the World Bank, 80% of Belarusian population belong to the middle class (Russia Economic Report... 2014). According to this index, the Republic of Belarus is ahead of all other middle-income countries. These data were received by World Bank experts on the basis of the financial-economic criterion – they considered those households, which consumed \$10 and more per capita per day, the middle class (using purchasing power parity rates at constant 2005 prices). In Europe and Central Asia, Belarus is followed by Lithuania and Hungary, where the middle class accounts for about 60% of the population. According to this index, in Latvia and Russia the share of the middle class is about 55%, in Poland it is 50%, in Ukraine this share is a little less than 50%. Tajikistan and Armenia are at the lowest position in this rating: the middle class accounts for only 2–3% of the population.

Pēteris Laķis is the first Latvian sociologist, who thoroughly studied the issues of social stratification in Latvia. For example, in his article “Social Stratification of Latvian Society in the Early 90s”, P. Laķis mainly used the ideas of the American sociologist B. Barber. B. Barber, considering the dynamics of the social structure of Western society, singled out 6 dimensions of stratification: occupational prestige, power and authority, income and wealth, education or knowledge, religious or ritual purity, family and ethnic groups, ranked by kinship and ethnic groups (Barber 1972).

P. Laķis identified 3 most significant measurements of stratification in Latvia during its transition period to a market economy: material inequality, attitudes toward the political power and occupational prestige (Laķis 1994). P. Laķis wrote: “The differentiation of the population by money income is being realized in the modern structure of the society: stratum of the rich, middle class and the poor” (Laķis 1994). Having studied the Latvian society in the early 90s, P. Laķis concluded that 3% of the population could be attributed to the rich, 12–13% to the middle class, and the rest to the poor stratum of the population. P. Laķis emphasized that in 1990–1993 the differentiation of the population increased, in this regard, and the strata bounds became clearer. The empirical data of the sociological research studies by P. Laķis testified that in the Latvian society there was a widespread tendency of self-identification with the poor strata of the population, in opposition to the majority of the US residents, who, as a rule, tend to associate themselves with a particular layer of material well-being, i. e. the middle class (Laķis 1994). However, further researches by Latvian sociologists have not noted this tendency.

Thus, in accordance with the very optimistic estimates given by the project experts “Latvia. Human Development Report. 1999”, in 1999 the middle class constituted 30–35% of the inhabitants of our country (Latvia. Human... 1999). According to the data of the sociological surveys carried out by the Institute of Philosophy and Sociology (IPS) (Riga) in the framework of the International Social Survey Program (ISSP), in Latvia the self-identification with the “middle class” in 1999 made up 55.7%, whereas in 2009 it was 62.8% (Menshikov 2012).

However, there appears a question whether a large part of our society really belongs to the middle class as claimed by the respondents of the sociological surveys. The data from Table 1 show that during these years the money incomes of the Latvian residents changed significantly as they increased across all quintile levels. For example, the upper bound of the low-income first quintile moved from LVL 28 to 85, and the lower bound of the high-income fifth quintile moved from LVL 84 to 221. At the same time, a significant transfer of the income per family member to the equalization of the income distribution aimed at low-income families did not happen. However, the representatives of the most profitable fifth quintile became poorer – the aggregate income decreased from 47.4 to 39.7%. The question remains though: can all the representatives of the fifth quintile be attributed to the middle class, not to mention the upper class?

Table 1. Income per family member, 2000 and 2011

Quintiles	Borders of quintiles, LVL		Aggregate income of the respondents in quintiles, %	
	2000	2011	2000	2011
1	0–28	0–85	5.4	7.1
2	29–44	86–126	10.8	12.5
3	45–60	127–160	18.6	18.1
4	61–83	161–220	17.8	22.6
5	84–2500	221–900	47.4	39.7

Source: Author's calculations based on the data of SKDS sociological surveys in the framework of the projects by Latvian University “Latvia. Human Development Report”.

Therefore we will continue our search for a more realistic share of the middle class and its most important characteristics using the cluster analysis of stratification variables and the theory of aggregate capital.

THE MAIN GUIDELINES AND METHODOLOGY OF THE RESEARCH

Implementing the project “Aggregate Capital, Its Structure and Relation to Labour Migration” we tried to consider the issues of the formation of the middle class in our country in detail. The theoretical basis of the project was a resource-based approach relied heavily on the understanding of the category of “capital” offered by P. Bourdieu (Bourdieu 1986). The use of the resource-based approach (the theory of aggregate capital) – the guidelines and methodology of sociological analysis – was first presented by us at an international conference in Poland (Menshikov 2008), while the test of the application of the mentioned approach to empirical sociological research was first described in an article published in the journal of Lithuanian Academy of Sciences *Philosophy. Sociology* (Menshikov 2011). The theoretical substantiation of the research project, the analysed structure of aggregate family capital, the operational notions, the main results of our analysis with respect to the issue of labour migration were published in 2013 (Meņšikovs 2013, Menshikov 2013).

The aim of our additional explorations in the framework of the implemented project was to identify the main parameters of the forming class stratification that meets the needs of the society to overcome the systemic crisis and to formulate the most important problems of the society arising from the incompleteness of the process. It was important to pay a specific attention to the most important characteristics of the candidates for the middle class on the basis of the theory of aggregate capital.

The subject of research is the formation of class stratification in the region (estimated on the basis of cluster analysis), the main characteristics of the selected clusters on the basis of the analysis of the volume and structure of aggregate resources and aggregate capital.

The hypothesis of the research is that our own previous research studies and the government statistics indicate the incompleteness of the formation of class stratification that meets the needs of the society to overcome the systemic crisis, that negatively affects both the economic and social development indicators and the possibilities of the residents of the region to effectively capitalize their resources in Latvia, thus responding to their needs for the quality of life without recourse to labour migration.

As a result of the cluster analysis, groups of cases are identified through the application of preliminarily defined variables. In our analysis, cases refer to individuals (social agents) that have similar manifest variables. In our opinion, using the cluster analysis aimed at finding the main social groups, which are a result of the integration (not necessarily strong and positively oriented) of social agents, it is necessary to apply those criteria that reflect “an ordered system of ranking” (Parsons 2010). At least 3 groups of factors, accumulated by the agents in various types of social space and active in the definition of their social positions, should be viewed as the search criteria for classes. These are empirically observable material circumstances of the life of the agents (dominant – average income per family member); the most important immaterial factors (dominant – the level of education) for the time being, and subjective factors (dominant – self-identification with a certain class). By all means, these criteria are not complete; there are cases, when an individual family member does not correspond to “class standard” (e. g. level of education), but in fact “that component of status shared by the members of the most effective kinship unit” (Parsons 2010).

ANALYSIS OF EMPIRICAL RESEARCH CARRIED OUT IN LATGALE

The object of the research is three age groups of the population of Latgale: 15–29-year-olds, 30–49-year-olds, and 50–75-year-olds. The number of respondents is 800 people, of whom 519 people (64.9%) living in Daugavpils. The sample is stratified by sex, age and education. Three variables are used to identify clusters:

1. Household income per member per month, LVL;
2. Level of education on 1–7 scale: 1 – basic, 2 – lower secondary, 3 – vocational, 4 – secondary, 5 – secondary professional, 6 – incomplete higher education, 7 – higher;
3. Self-identification with a social layer on 1–6 scale: 1 – the lowest group, 2 – working class, 3 – lower middle class/upper working class, 4 – middle class, 5 – upper middle class, 6 – upper class.

Table 2. Average value of the preliminarily defined variables of cluster analysis, Latgale, 2012

	Cluster 1	Cluster 2
Household income per member per month, LVL	503	151
Level of education (1–7 scale)	6	5
Self-identification with a social stratum (1–6 scale)	4	3
Number of people in a cluster	36	572
Share of cluster in %	6	94

Source: the table compiled by the author on the basis of the data from a sociological survey “Aggregate Capital, Its Structure and Relation to Labour Market”, $n = 800$ people.

Calculation of the probability of error based on the F-test (p values) for all 3 variables showed that their differences between the clusters are statistically significant in all three cases, $p = 0.000$.

The clustering of the population of Latgale applying the 3 variables shows only two clusters (Table 2). The first of them (Cluster 1) makes up only 6%: average income per a family member per month – LVL 503, level of education – incomplete higher, self-identified class – middle stratum. The majority of our respondents made up the second cluster (Cluster 2): average income of LVL 151, level of education – secondary professional, self-identified class – lower middle class/upper working class. Therefore it is clear why applying the cluster analysis to the identified characteristics of our respondents we cannot find clusters of the upper middle class and the upper class, as it happens due to their minuscule proportion in the region and inaccessibility to sociological surveys. In turn, the absence of the lowest groups and working class, in our opinion, can be explained by a weak ability of income to differentiate. According to the formula of the Euclidean action, the variable with maximum values dominates over the variables with minimum values (in our case, these are the levels of education and class self-identification). It can be stated that the representatives of the second cluster, first of all, group into one cluster in accordance with their family income, but their incomes, if compared with the ones of the first cluster, are relatively low and even in their entirety cannot affect the formation of groups.

Considering class stratification the way it was understood by T. Parsons, almost all members of the second cluster can be attributed to the “lower class”, taking into account the complexity and inconsistency of the status positions of many of them. For example, when the income of

a significant part of employees with higher education is at the subsistence level (or even below it) or when the respondent with such income identifies himself with the upper class.

The group of our respondents, who made up the first cluster marked by the dominance of self-identification with the “middle class”, should be considered very carefully. First of all: has a critical mass of the bearers of the selected characteristics been formed there, so that we can consider this social group a class? Secondly, how strong and stable are these characteristics even for those, who possessed them at the time of the sociological research (especially monetary income)? According to our survey, not everyone identified with the “middle class” had property and savings.

Table 3. Aggregate resources and capital in formed class clusters, Latgale, 2012

	Cluster 1	Cluster 2
Aggregate resource, points	22.00	18.51
Aggregate capital, points	19.08	15.15
Resource capitalization, %	86.7	81.8

Source: the table compiled by the author on the basis of the data from a sociological survey “Aggregate Capital, Its Structure and Relation to Labour Market”, $n = 800$ people.

Calculation of the probability of error based on the F-test showed that the differences between the clusters are statistically significant in both aggregate resources ($p = 0.000$) and aggregate capital ($p = 0.000$).

Table 4. Types of aggregate resources and capital in formed class clusters, Latgale, 2012, % and rank

Types of resources and capital	Resources				Capital			
	Cluster 1		Cluster 2		Cluster 1		Cluster 2	
	%	Rank	%	Rank	%	Rank	%	Rank
Cultural	12.69	1	12.44	4	13.88	1	12.49	4
Economic	12.66	2	13.06	2	13.51	2	13.46	1
Human (vocational and educational)	12.62	3	12.30	5	12.54	3	11.99	5
Physical	12.48	4	13.63	1	10.96	5–6	9.81	6–7
Social	11.64	5	11.65	6	11.83	4	13.35	2
Symbolic	11.43	6	10.19	7	10.96	5–6	9.81	6–7
Geographical	10.77	7	12.64	3	10.60	7	13.01	3
Administrative	9.47	8	7.66	8	9.19	8	6.89	8
Political	6.24	9	6.32	9	4.12	9	4.48	9

Source: author's calculations based on the data of a sociological research “Aggregate Capital, Its Structure and Relation to Labour Market”, $n = 800$ respondents.

The differences in most of the types of resources and capital are statistically significant, with the exception of geographical ($p = 0.508$), physical ($p = 0.135$) and symbolic ($p = 0.106$) resources, and geographical ($p = 0.681$) and physical ($p = 0.061$) types of aggregate capital.

The analysis of the data (Tables 3 and 4) shows that the structure of the aggregate resource of representatives of the first cluster and the one of aggregate capital are dominated by the same “powers of social improvement”: cultural, economic, vocational and educational. Moreover, it is important not only to possess these identified resources, but also to be able to use them effectively, to capitalize. It is notable that the representatives of the first cluster treat social resources in a rather pragmatic way, taking into account that, in the ranking scale, social capital moves the physical one from the 5–6th position onto the 4th one. The inhabitants of Latgale, that form the second cluster, significantly differ from the first cluster in the structure of aggregate resources and in their ability/possibility to effectively use the ones marked as available resources. Physical, economic and geographic resources dominate among the aggregate ones, whereas economic, social and geographical types of aggregate capital dominate among the aggregate capital. It is most likely to observe inability (or lack of ability at the place of residence) to capitalize one’s physical resources – it is moved back from the first position among the types of aggregate resources to the 6–7th position among the types of aggregate capital. However, social resources turn out to be more significant for the representatives of the second cluster: they move from the 6th position among the resources to the 2nd position among some separate types of aggregate capital. Interestingly, but geographical resources are essential for the representatives of the second cluster.

Relative scarcity of vocational and educational resources and, in particular, cultural ones among the representatives of the second cluster is due in large part to their “dissent” to the hierarchy of social stratification; it does not allow a very large proportion of the population of our region to really claim a place in the middle class. According to the self-identifications of our respondents, who entered the second cluster, economic capital dominates in the structure of aggregated capital. However, capitalization of the aggregate resources with an average in the second cluster, in monetary terms, provides the income amount, on the average, of 151 LVL per family member per month. According to the Central Statistical Office (CSO), in 2012, the income of 79% of Latvian households was below the minimum amount needed to cover basic expenses. At that time, the required monthly income was 279 LVL and the net monthly income was 213 LVL (У большинства 2013). So, the general situation with monetary income in Latvia differs favourably from the one in Latgale, though it qualitatively presents the economic stratification of the society, where the “middle class” is still at an early stage of its formation.

DISCUSSION AND CONCLUSIONS

Our analysis, based on the theory of aggregate capital and clustering of variables that reflect the most important economic and social characteristics of the population of Latgale, confirms the class character of our society. In a class structure, the place of a family is based on the aggregate resources (first of all, economic ones) the family possesses, on the possibility and ability to capitalize them. Classes are the objective social reality, but our lifestyles that change rapidly under the influence of various factors (from technological innovations to global and radical transformation of the civilizational foundations) bring new features and characteristics into the very notion of classes. It is not only in everyday consciousness but also in a scientific one that a social class system can be considered an irrelevant phenomenon, which is inferior to some other social differentiations (ethnic, religious, gender, regional, linkages to certain technological trends, etc.). In our opinion, the following issues of the class require an increased attention and a thorough scientific analysis:

1. While the economic criterion remains as the base, the role of other class-criteria that are reflected in different ways in countries with different levels of economic development and civilizational peculiarities is becoming more noticeable. In conditions of establishing the knowledge economy, cultural capital is increasingly important in the structure of the aggregate capital of an employee.

2. It is difficult to empirically set the bounds of the class, to determine their share in the population of various countries. It is particularly difficult to differentiate the “lower class”, a significant part of which is referred by some sociologists to a new class of the precariat. How is it possible to “catch” an ever growing community by means of a cluster analysis if it does not possess any of the commonly used class-signs? (Standing 2011).

3. The role of the subjective criterion of self-identification of an individual with a particular class is strengthening. As a rule, in the countries like Latvia, individuals overestimate their place in the class structure of a society, and, at the same time, in the absence of the minimum resources needed to demonstrate the image and lifestyle of the class, with which an actor identifies himself, the estimated modality of status can be incorrectly implemented.

4. Actual global stratification of the humanity, strengthening of the role of “super-class”, when the wealth and power of its representatives exceeds the national income of some countries, is increasingly visible. On the eve of the Economic Forum in Davos (2016) Oxfam, British charity organization, reported a shocking fact: the well-being of 1% of the richest people in the world (around 73 million people) is equal to the well-being of the rest of humanity (Oxfam... 2016).

5. The decrease in the number of the middle class and the reduction of its progressive role take place almost everywhere either due to the growth of the crisis of a social state, or because of the lack of economic and political resources to create such a state. Fragile attempts of parliaments and national governments of some countries to introduce progressive taxation, solidarity tax, tax on currency speculation and other measures to redistribute aggregate income in favour of those, who need social benefits, who are seeking to raise their status to the level of middle class, are categorically rejected by the representatives of large corporations and high officials.

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Socialinių klasių tyrimo patirtis Latvijoje

Santrauka

Stripsnio tikslas yra supažindinti su socialinių klasių stratifikacija Latvijoje. Remiamasi moderniomis visuomenės stratifikacijos koncepcijomis, pagrindinį dėmesį skiriant vidurinei klasei. Tyrimo metodologija grindžiama P. Bourdieu agreguoto kapitalo koncepcija panaudojant klasterinę analizę. Pateikiami stratifikacijos Latvijoje tyrimo duomenys.

Raktažodžiai: socialinė klasė, vidurinė klasė, agreguotas kapitalas, klasterinė analizė