

Chapter 5: The Middle Class in France

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In France, the question of the middle class emerged essentially at the end of the 18th century, around the time of the French Revolution and the abolition of privileges. In 1870, the founding fathers expected that the Third Republic would lead to the advent of a “new social stratum”—essentially, a class of owners that could live off their own labour.

Starting at the beginning of the 20th century the middle classes are mentioned in the plural. As an increasingly diverse social group, they have become an important subject of study for social sciences. Sociologists, economists and historians propose several definition criteria. François Simiand proposes economic criteria (income and wealth of average level between the highest social class level and the workers and employees level), geographical criteria (urban population of small towns) and professional criteria (high craft, small- and medium merchants and industrialists, part of the liberal professions and the average civil servants).

So, even if members of the middle class have some characteristics in common (the exercise of a technical activity involving practical knowledge of a certain number of rules), the sociologist Maurice Halbwachs underscored (in his Sorbonne lesson devoted to middle classes in 1939) the heterogeneity of the middle classes. This heterogeneity refers not only to material conditions and profession but also to the existence (or lack thereof) of a common consciousness.

As a study subject, the question of the middle classes also became a source of social mobilisation at the beginning of the 20th century. Very early, social groups identifying themselves with the middle classes became mobilised socially to defend their common interests; to address the creation of the income tax, they founded the “Middle classes defence association” in 1908, and to address a tax system deemed too high they founded a “General confederation of middle class union” in 1930.

If these social mobilisations went on after 1945 with the creation of the “Middle Classes National Committee”, presenting France as a middle-class country, most of these stakeholders were still self-employed workers. However, the post-war period marked the rise of new middle classes, symbols of the movements of wage-labour, urbanisation and “moyennisation” of the French society.

From the 1970s crisis to the 2000s, the middle classes occupied a less central place in the public debate. However, they remain an important political concern. In 1976, Valérie Giscard d'Estaing, President of the Republic from 1974 to 1981, considered that the social evolutions in progress would lead to “the expansion of a huge central group” which would “progressively and peacefully integrate the French society as a whole.” Similarly,

their economic situation is tackled at each tax or social protection system reform. But compared to unemployment, poverty and exclusion issues, the middle classes were no longer a subject of major political confrontation or a key subject of expertise.

Nevertheless, since the 2010s the question of the middle classes has become once again an important concern. Less and less stable, precarious, suffering from downward social mobility and “demoyennisation”¹ of the French society, or on the contrary, in expansion, always envied by the popular classes for their stability and climbing the social ladder thanks to education, the middle classes are back at the heart of French society’s concerns.

To analyse the sometimes differentiated evolutions of middle classes, we adopt the relative approach of Courtioux, Erhel and Vaughan-Whitehead (2016 and 2017) to make the following definitions:

- upper middle class: standard of living between 120 and 200% of the median standard of living;
- middle-middle class: standard of living between 80 and 120% of the median standard of living;
- lower middle class: standard of living between 60 and 80% of the median standard of living.

The analysis below builds on recent works by Pierre Courtioux, Christine Erhel and Daniel Vaughan-Whitehead, with updates from the new survey waves ERFS 2012, 2013 and 2014.

1. The income perspective

The share of the French middle classes has been quite stable over time, in terms of both population share and income. In 2014, a French household belongs to the middle class if its median standard of living is between € 12,092 and € 40,306 a year. This is almost identical to the levels of 2008. The largest increase in standard of living, 15.7% in cumulative terms, took place between 1996 and 2008.

The main source of income for 90% of the middle class is labour income. Unlike high-income classes, the middle classes receive very little capital, financial, land or securities income (4.8% from other income, compared to 18.9% in the upper classes).

Beyond these global trends, there is, however, a high degree of diversity among subdivisions within the middle class. Income inequality increased only a little between 1996 and 2014, but the middle classes are the income group with the highest income gap between the richest and poorest households. According to some specific indicators,

¹ “moyen” is French for middle or average. Moyennisation is the process of achieving a larger middle class and less extremes. Démoyennisation (“de-averaging”) is the opposite movement, i.e., an increase in extremes.

income inequality within the middle class is even higher than in high-income classes: its D9/D1 ratio is 2.29, against 2.12 for high-income classes.

The French socioeconomic system greatly reduces income inequalities before and after redistribution. Figure 1 shows how the low-income class obtains on average 18% of their income from social benefits—but it is not much lower for the other income classes (22% for the middle class and still 14% for the highest incomes).

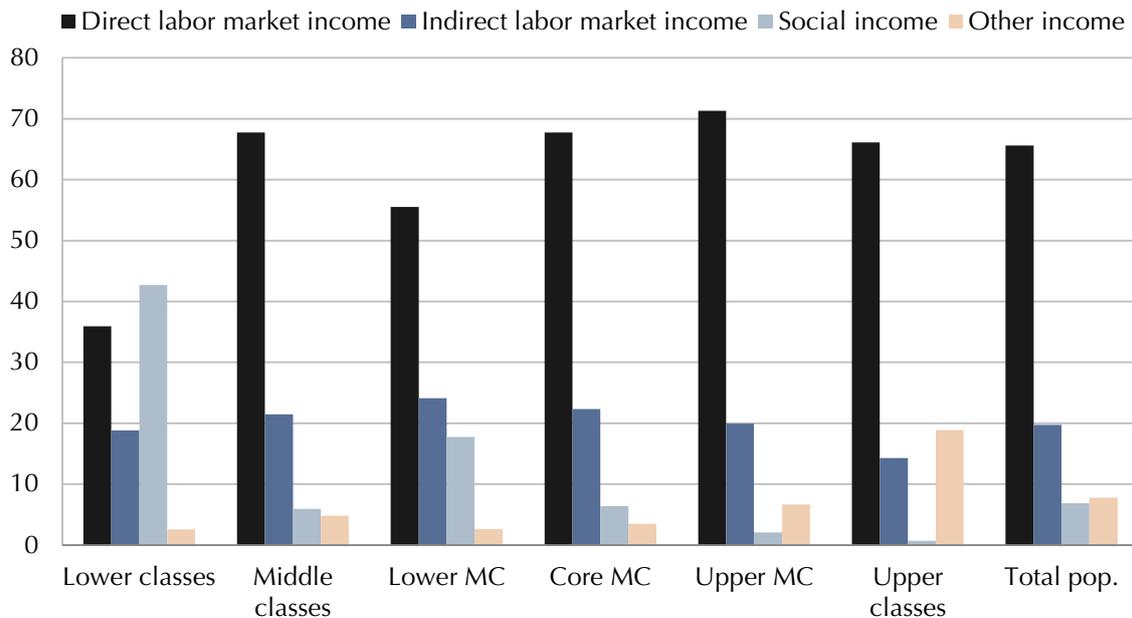


Figure 1: Source of income for difference income groups in 2014

Direct labour market income includes wages, agricultural, industrial, commercial and non-commercial income. Indirect income from the labour market consists of unemployment benefits, early retirement benefits and retirement pensions (excluding the minimum old-age benefit). Social income includes all social benefits. Other income includes financial, land, securities and foreign income of the household. Source: Computations by France Stratégie, based on data from the fiscal and social income study (ERFS) of the French national statistics office (Insee, the National Institute of Statistics and Economic Studies), 1996-2014.

The middle classes hold less wealth than indicated by their population share in the French population (66% of the total gross wealth for 78% of the population), but the gap is becoming smaller (wealth growth of 11% between 2010 and 2014 compared to 4% for the French population as a whole). The upper middle classes have a total wealth greater than their share in the French population (25% and 36% respectively); see Figure 2. This illustrates the heterogeneity of the middle classes.

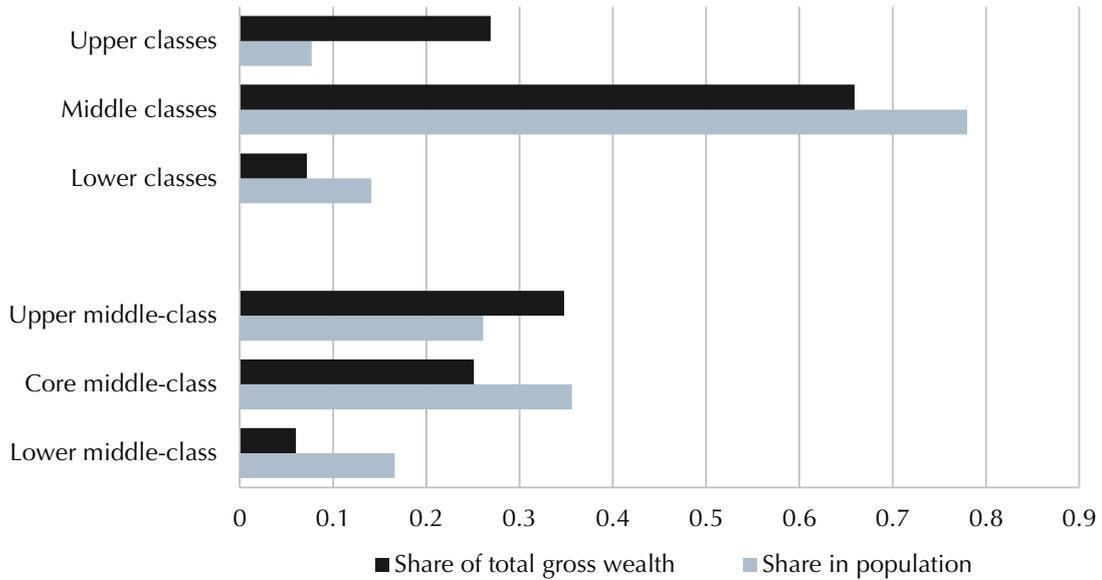


Figure 2: Share of gross wealth by income class in 2015

Based on households living in France, including DOM (overseas departments, excluding Mayotte) Source: France Stratégie, INSEE, Wealth survey 2014-15.

Finally, regarding the income perspective, Régis Bigot talks about “middle classes under pressure” (Crédoc, *Consommation et modes de vie*, 2008), with increasingly constrained expenditures, especially for the lower middle classes. Figure 3 shows the percentage of households that experience constrained expenditures in their budget. Between 1979 and 2005, the part of constrained expenditures in household budgets increased by 17 %-points for the lower middle classes.

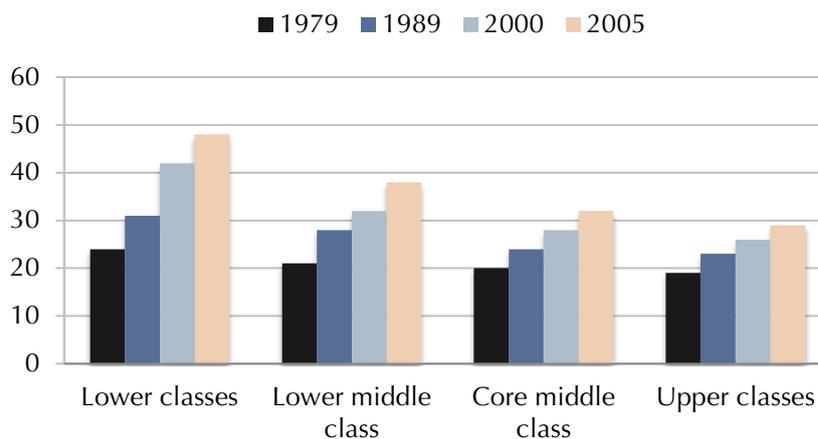


Figure 3: Constrained expenditures by income category

Source: Mareuge and Ruiz (2008), Family budget survey, INSEE. Ordinary households living in France, including DOM (overseas departments, excluding Mayotte).

After deducting 38% of constrained expenditure (housing, water, electricity) and 42% of essential expenses (food, transport, health, education), only 20% remains for discretionary spending such as leisure or clothing. This small share of the budget devoted to the remaining expenditure is much closer to the situation of the 10% of the poorest households than that of the richest households, with respectively 13% and 35% of the budget not allocated to constrained or unavoidable expenses.

Nearly 50% of middle-class households expect a reduction in their purchasing power in the following year (compared with 34% of low-income classes). This could be explained by the smaller share of discretionary spending, which is the most salient category and is comprised of 'aspirational goods' or status-enhancing consumption.

2. Non-income-related perspectives

The affordability of housing

A 2010 survey from Fondapol (a French think-tank) finds that the feeling of belonging to the middle classes is strongly correlated with homeownership; see Fondapol (2010). Our own analysis of the data is shown in Table 1 below. In 2014, the middle classes consist mostly of owners (62% against 36% of tenants) and are rarely tenants of social housing (13%).

Table 1: Residential status

Source: France Stratégie, based on data from the fiscal and social income study (ERFS) of the French national statistics office (Insee, the National Institute of Statistics and Economic Studies), 1996-2014.

	Lower classes	Middle classes	Lower middle class	Core middle class	Upper middle class	Upper classes	Total
Owner	22	62	37	63	79	86	57
Tenant	76	36	60	36	20	12	41
Tenant in public housing	41	13	27	13	3	3	17

In the case of housing, there is also a high degree of diversity among the middle classes: from lower- to upper middle class the ownership percentage varies from 37% to 79%. For the lower middle class, Goux and Maurin (2012) suggest that the increasing difficulties of housing affordability of lower middle classes fuel feelings of uncertainty and downward social mobility.

Family stress

Employment issues and working conditions seem to be a major key for understanding the characteristics, evolutions and worries of the French middle classes. Their incomes essentially come from the labour market and the intensity of the labour activity within the couple of a household has a significant impact on that household's ability to belong to the middle classes and to remain there despite changes on the labour market.

The Labour Market

Income varies greatly along socio-professional categories. Intermediary occupations, employees and skilled workers have more than an 80% chance of belonging to the middle classes. The liberal professions are more likely to belong to high-income classes than to the middle classes. Farmers, tradesmen and other inactive workers are more often than the rest of the population to be members of the low-income class.

There is a certain duality of working conditions among the middle classes. While the desire to belong to the middle classes can be partly based on an aspiration for greater stability of employment, the working conditions of the middle classes have become more precarious and more similar to those of the lower income classes. 25% of the lower middle class works part-time (compare with 7% of the whole population). They have fewer fixed-term contracts, however (10% compared with 18% in the general population); see Table 2.

Table 2: Employment type of middle-income households

Source: France Stratégie, based on data from the fiscal and social income study (ERFS) of the French national statistics office (Insee, the National Institute of Statistics and Economic Studies), 1996-2014.

	%	Lower classes	Middle classes	Lower MC	Core MC	Upper MC	Upper classes	Total pop.
Type of employment contract	Fixed-term contract	13	7	10	7	5	3	7
	Temporary agency work	5	2	4	2	1	0	2
Working time	Part-time	32	18	26	18	14	14	19
	Would like to work more	30	19	28	20	12	7	19

Social Mobility

The qualification level has an increasingly important impact on the probability of belonging to the middle classes. The percentage of middle-class persons with a tertiary degree is 84%, up from 77% in 1996. For the higher-income class, this effect is even more pronounced: 23% have a higher tertiary degree (Bac+3 and higher) against 8% in 1996.

Figure 4 looks at the distribution of classes within categories of educational attainment. For simplicity, we show only Primary and Tertiary education. In 2014, 71% of the graduates of tertiary education belong to the middle classes, down from 75% in 1996.

The educational level does not fully compensate for the importance of social origin. On the contrary, social reproduction seems to be strengthening. Several sociologists (Valat, Vallet, Peugny, 2016) document a fall in the returns to schooling and an increase of inequalities related to social origin for obtaining the diploma after leaving the school system. This could be due to the relations between the real estate market and school quality: The best schools are more likely to be located in cities and neighbourhoods with the highest real estate prices.

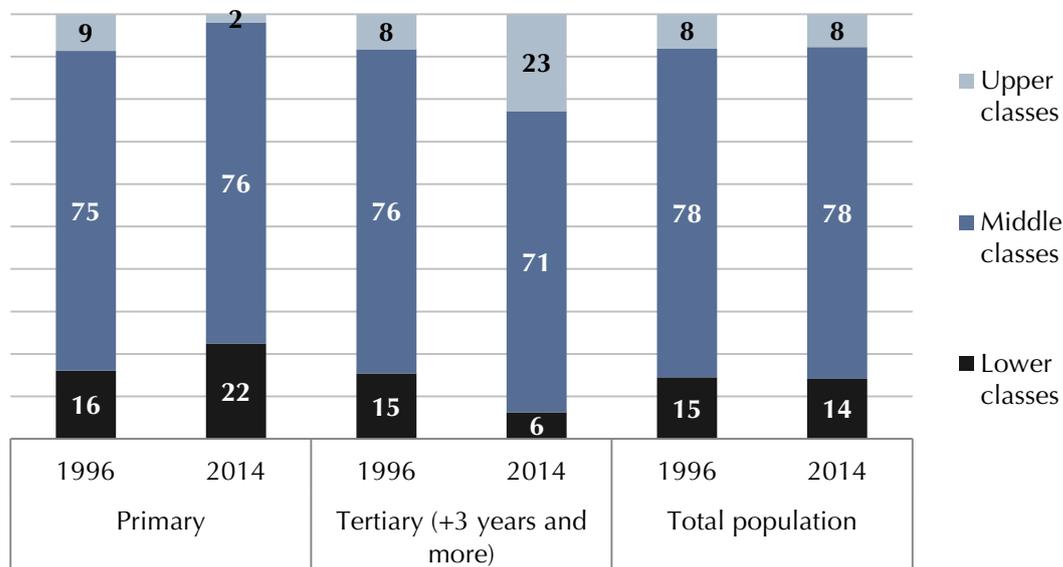


Figure 4 : Income class and education level in 1996 and 2014

Source: France Stratégie, based on data from the fiscal and social income study (ERFS) of the French national statistics office (Insee, the National Institute of Statistics and Economic Studies), 1996-2014.

Children whose parents belong to socio-professional category of intermediary occupations, employees but also workers, are more likely in 2014 than in 1996 to belong to the middle classes. On the other hand, children of self-employed people (lawyers, doctors and so forth) and managers are more likely to belong to high-income classes in 2014 than in 1996.

Analysing the social mobility of the middle classes in France remains complex and depends on the exact criteria used to evaluate mobility. The sociologist Louis Chauvel, through an approach in terms of living standards and income, finds a destabilisation, decline and a de-averaging (“démoyennisation”) of the French society (2006, 2016). On the other hand, economists such as Dominique Goux and Eric Maurin, using an approach in terms of occupation, socio-professional category and employment situation, find that the French middle classes have experienced a stabilisation and an

overall improvement in their living conditions, despite the heterogeneity and difficulties of the lowest incomes. Using an income approach, Régis Bigot rejects the finding of a de-averaging of the French society. He does find the perception of decline due to the increase in constrained expenditure, the downward social mobility of young people and employment insecurity.

Generational issues

There has been a relative aging of the middle classes since 1996 and, above all, an increase in poverty among the youngest. Thus, 18-29 year-olds have a higher probability of belonging to the middle classes in 2014 than their counterparts did in 1996 (75% vs. 72%), but they are much less likely to belong to the upper classes (9% in 1996 and 2% in 2014) and much more likely to belong to the low-income class (19% in 1996 and 23% in 2014). People who are 65 years old and over are much more likely to belong to the middle classes in 2014 than in 1996.

Regional differences

The middle classes are historically associated with medium-sized towns—and the probability of belonging to middle classes is still stronger for inhabitants of rural areas and small towns. In absolute numbers, most middle-class households live in large cities.

However, in large cities such as Paris and its suburbs, there is also greater social diversity and an overrepresentation of the poorest and richest households, compared to the rest of French territory. Thus, households have a 70% chance of belonging to the middle classes in Paris and its suburbs, compared with 81% in towns with less than 200,000 inhabitants.

Household composition

The vast majority of middle-class households are couples with children, and this is true for the whole of the middle classes—lower, core and upper middle class; see Figure 5. A dual-earning couple has the highest probability of belonging to the middle classes, whether or not the couple has children. Couples with children whose two members are employed have a much higher probability of belonging to the middle classes. Due to greater labour market participation, dual-income households with children have higher incomes and thus reach the various thresholds of standard of living necessary to belong to the middle classes.

Singles also have a high probability of belonging to the middle classes, but their risk of belonging to the lowest income groups is higher than for the general population (16% vs. 14%). Poverty risks are especially high for single-parent families, with 31% of these households belonging to low-income groups.

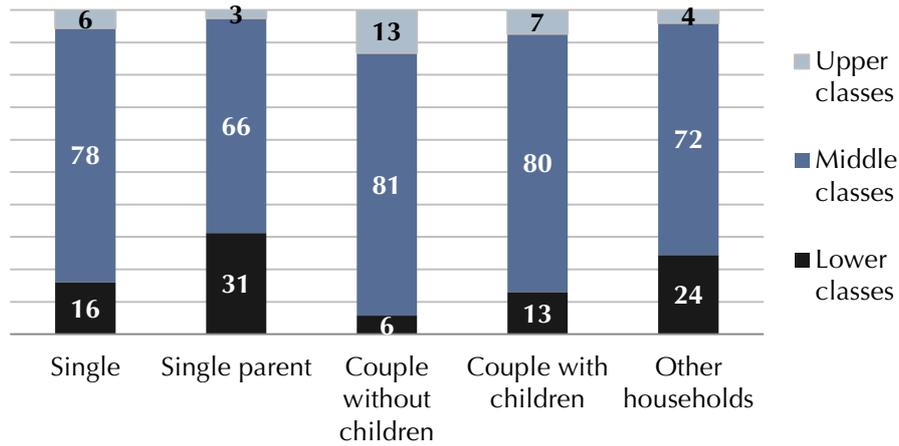


Figure 5: Household composition per income class in 2014

Source: France Stratégie, based on data from the fiscal and social income study (ERFS) of the French national statistics office (Insee, the National Institute of Statistics and Economic Studies), 1996-2014.

3. Perceptions

In terms of perception, a large majority of French households consider that they belong to the middle classes. French people tend to overestimate the share of households belonging to the lower income classes (20% to 25% in self-declaration versus 14% in 2014, according to our income class definition). Yet, identification with the middle classes is increasing, despite the decline of social class identification. Nearly 80% of French households thus consider that they belong to the middle classes. This proportion is very close to the proportion we obtain when we define the middle classes in terms of income.

However, French household perceptions about social mobility are much more negative, as can be seen in a study carried out by Insee (the National Institute of Statistics and Economic Studies) in July 2017. The study found that—despite a rise in skilled employment and an upward social mobility higher than the top-down social mobility—a quarter of French people declare that they are facing a situation of downward social mobility compared to their father. This feeling of downward mobility affects all social groups, especially children whose parents had a typical middle-class occupation, see Figure 6.

From those whose father had attained an intermediary occupation, 32% regard their situation low, or lower than that of their father. For those with a father with a white-collar job, this is the case for 54% of people. In total, 23% of individuals in intermediary occupations consider that their status or occupation is socially lower or much lower than their father's occupation.

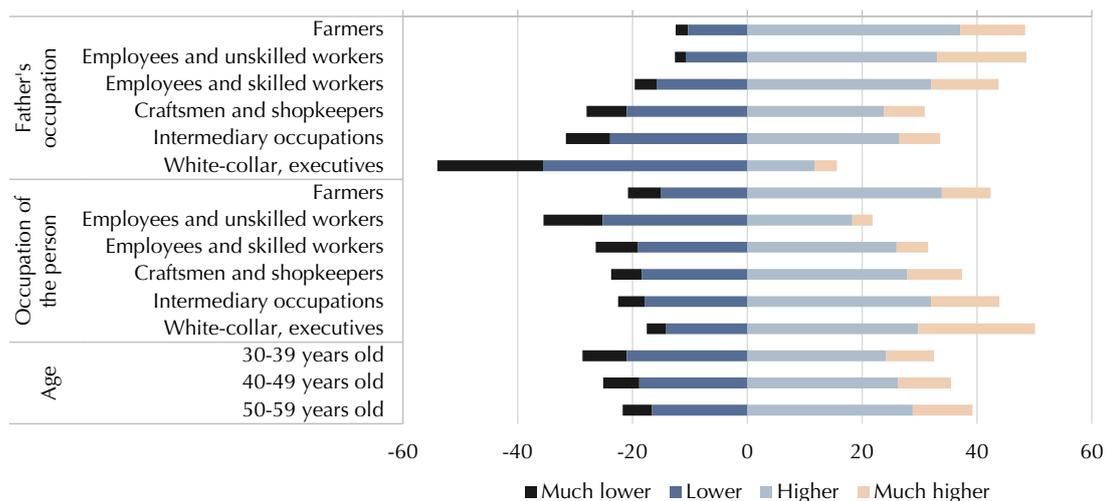


Figure 6: Perceived social mobility

Perception of upward and downward social mobility according to the profession of the person and the profession of the father. Source: INSEE, FQP survey 2014-2015. Insee Première no. 1659, July 2017. Executives means executives, senior intellectual professions and managers with ten or more employees.

The perception of downward mobility is particularly felt among young people: nearly a third of 30-39 year-olds think that their status or profession is lower or much lower than their father's occupation. On top of that, this feeling of downward social mobility is also observed among individuals who do not face downward social mobility. More than 50% of people who think that they may lose social status do not experience it. These individuals either are experiencing upward social mobility (8%) or status mobility (20%), or are occupying the same socio-professional category as their father (30%).

The feeling of downward mobility is also strong in socio-professional categories, which represent the main share of French middle classes: 34% of white-collars, 24% of intermediary occupations and 27% of shopkeepers occupy the same socio-economic categories of their father and think nevertheless that they are in a situation of downward mobility. According to Insee, working conditions, particularly the risk of unemployment, partly explain these feelings. Between two occupations experiencing the same level of downward mobility, this feeling is less pronounced when the risk of unemployment is lower and wages are higher.

4. Political representation

Most of the time, the middle classes have been central in the French political debate. The Third Republic founding fathers celebrated the social group, the president of the Republic (1974-1981) Valéry Giscard d'Estaing called for the strengthening of a "central

group” and at each economic crisis, the majority of political leaders worry about a potential weakening of the middle classes.

The voting of the middle classes has led to decisive political changes in French history. According to political scientists Georges Lauvau, Gérard Grunberg and Nonna Mayer, the failure of the Popular Front in 1938 could be explained in part by its inability to obtain the middle-classes’ support. In 1981, they contributed greatly to the election of a President from the Socialist Party, François Mitterrand. In that election, the party was able to rally the support of many middle-level white-collar workers, technicians, and clerks and to count on the already older support of the majority of middle-class civil servants.

Despite this “class-issue” (Lavau, Grunberg, Mayer), decisive in order to obtain a political majority, the middle class is not represented as such in the political realm. They are too fragmented to constitute a joint representation (i.e., the votes of the middle classes correlate with different socio-professional categories and on the changing composition of the French society). In the 1970s and 1980s, employees, intermediary occupations and middle managers gradually moved closer to the left, while small shopkeepers and craftsmen preferred conservative parties.

Despite the retreat of the workers / non-workers division, two other divisions remain important in the analysis of electoral behaviour: the division between employees / self-employed workers and the division between public and private sectors. Intermediary occupations and employees from the public sector or large formerly public firms vote mainly for left-wing parties; self-employed professionals, shopkeepers, craftsmen, farmers and entrepreneurs tend to vote for right-wing parties.

Far-right-wing parties have historically had little success among middle-class voters. But they have significantly progressed in recent years, especially among the most weakened classes. Support for the National Front has progressed among every social category, but they have been particularly successful among workers and employees (whereas it is still difficult for them to convince middle- and upper middle classes). Carrying out an electoral analysis thus requires that a distinction be made between income levels and socio-professional categories comprising the middle classes. Moreover, other variables are needed to capture the changes of the French middle-class electoral behaviour: educational level, perceptions of job security and feelings about their economic and social situation.

The electoral year 2017 led to a major political change in France, with Emmanuel Macron's victory in the presidential elections and his party obtaining an absolute majority in the legislative elections. His party, *En Marche*, which did not exist one year earlier, drew a large share from votes that traditionally went to mainstream parties — the Socialist Party on the left-wing and the Republicans (formerly the UMP) on the right-wing. Regarding the National Front, workers constitute the socio-professional category which voted most for Marine Le Pen, together with 19% of intermediary occupations

and 32% of employees. Lower incomes voted proportionally more for the National Front.

In addition to these analyses by socio-professional category and income, electoral behaviour varies greatly according to educational level and the perceptions of individuals regarding their present and future socio-economic situation. People who declare that they face either downward social mobility or economic difficulties, or people who have a low level of education, are much more likely to vote for Marine Le Pen. The electoral behaviour of the middle classes in 2017 seems to rely particularly on these issues.

5. Conclusions

The French middle classes are relatively stable in terms of numbers and inequalities, and even experienced a small increase in their standard of living between 1996 and 2014, despite the declines or a certain slowdown since the beginning of the 2010s.

Employment issues and working conditions seem to be a major key in order to understand the characteristics, evolutions and worries of the French middle classes. Their incomes essentially come from the labour market, and their participation has a significant impact on households' ability to belong to the middle classes and to remain there, despite changes on the labour market itself.

The outlook of many middle-class households is more negative than may be warranted by the numbers. Most of this is driven by the risk of unemployment and the declining share of income that can be spent on aspirational goods and leisure.

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