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Unequal and Divided
The Middle Classes in Contemporary Brazil

Sérgio Costa



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Executive Editors: Peter W. Schulze, Universität zu Köln, Germany

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Abstract

The middle class, or rather middle classes, to do justice to their heterogeneity, have been and continue to be at the centre of the long political and economic crisis that has been ravaging Brazil since 2014. Available interpretations that try to explain the positions taken by different political authors are biased by structural, ideological, or cultural determinism. To escape these determinisms, I draw on Stuart Hall's political sociology in order to understand the link between the class situation of the middle classes and their constitution as political subjects of various shades as contingent intersectional articulations. The emphasis on contingency obviously does not imply a belief that political developments are fortuitous and detached from social structures. Nor does it ignore the existence of groups with deeply held ideological or cultural convictions who consistently adopt, over long periods of time, political attitudes compatible with these beliefs. However, taken as a whole, the middle classes have shown a very heterogeneous and changing political trajectory over time. They adhere to discourses - both right-wing or more egalitarian ones - and make political choices based on the power of these narratives to capture, in given circumstances, their anxieties, expectations, claims and aspirations.

Keywords: Brazil | middle classes | political attitudes

About the Author:

Trained in economics and sociology in Brazil and Germany, Sérgio Costa is a professor of sociology at the Freie Universität Berlin. He is a principal investigator and spokesperson of Mecila.

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1. Introduction

Progressive voices in the past tended to be suspicious of the middle class because they considered it chronically conservative, while conservatives saw it as a central pillar of modern institutions. Opinions about the middle class have since multiplied and diversified. Accordingly, the middle class became one of the most researched and politically disputed topics in the first two decades of the 21st century.

Göran Therborn identifies two major trends in contemporary debates about the middle classes: references to the middle classes in the global south identified as new possibilities for development (“southern dreams”) and narratives about the middle classes in the Global North, presented as abandoned and forgotten by politicians and large corporations (“northern nightmares”). According to Therborn, despite these diverse discourses, both the northern and southern middle classes ultimately have a common destiny within digital capitalism, particularly since the emergence of the Covid-19 pandemic as the “Great Unequalizer”: “The ‘forward march’ of the Southern middle class, by whatever definition, has halted. Northern nightmares, on the other hand, are likely to continue” (Therborn 2020: 86).

In Brazil, recent discourses on the middle class combine the characteristics identified by Therborn in both the global South and the global North. The dream, nurtured by centre-left governments until 2014, that the expansion of the consumption capacity of the so-called emerging middle class would lead to continued and inclusive economic growth, has since then been transformed into the frustration of the expectations of upward mobility, especially for the so-called “new middle class”, and anger among the established middle class because of their loss of privileges. The result is the nightmare materialised in the 2018 election when voters elected the radical right-wing Jair Bolsonaro to govern the country.

The middle class, or rather middle *classes*, to do justice to their heterogeneity, have been and continue to be at the centre of the long political and economic crisis that has been ravaging Brazil since 2014 and which has dramatically worsened since March 2020 due to the Covid-19 crisis.

While an already wide range of studies seeks to research the role of the middle classes in the protracted Brazilian crisis, the present essay engages in a critical dialogue with this literature in an attempt to understand how middle-class political subjects are constructed in the Brazilian triple crisis: the economic, political and health crises.

In the first section of this essay, I discuss, on a theoretical level, how the middle classes as a class situation (*Klassenlage*) and the middle classes as political positions or subjects are articulated. In the second section, I describe the social and political changes observed in Brazil since the Workers’ Party (PT) came to power in 2003 to identify the

dislocations and fluctuations in the middle classes' class situation since then. In the third section I try to make sense of the different articulations between variations in class situation and adherence to different political discourses since the outbreak of the economic crisis in 2014 until February 2022, when this essay was finished. I conclude by summarizing the main results of the analysis developed in this paper.

2. Class Situation and Political Articulation

2.1 Social Classes and Political Subjects

Disagreements over how social class, as positions in the social structure, and political preferences or behaviour are linked are as old as sociology itself. They date back to two of the main founders of the discipline, Karl Marx and Max Weber, and have since then marked the development of two distinct lineages in the understanding of the relation between class as a social situation and class as a political subject. In the Marxist tradition, the prevailing understanding is that there is a necessary, albeit historical, i.e., not mechanical and not deterministic, nexus between the position in the structure of the two classes prevailing in capitalism, namely, the proletariat which sells its labour power, and the bourgeoisie, which owns the means of production, and political consciousness and action. The reduction of the multiplicity of social positions to two classes and the rigidity attributed to the relation between the structural dimension (class in itself) and the political dimension (class for itself), proper to Marxism, until a few decades ago prevented Marxists from recognizing the political and social relevance of the middle classes. This panorama was only modified from the end of the twentieth century onwards when the first Marxist authors and particularly E. O. Wright seriously addressed the social place and political role of the middle classes (Wright 1985).

In the lineage born with Max Weber, the nexus between class situation (*Klassenlage*) and political consciousness and action is seen in a much more flexible and dynamic way. In Weber's own words, people belonging to the same class may, in fact, act politically under certain circumstances in favour of their common interests as a community of interests, "but it does not have to be so; in any case, class is not a community [*Gemeinschaft*], and treating classes conceptually as synonymous with communities leads to distortions" (Weber [1922] 1956: 533).¹ Moreover, to the extent that class is defined by a group's shared "specific determining factor of their vital chances" (Weber [1922] 1956: 531), that is, the place occupied in the hierarchies of wealth distribution, and no longer exclusively by the ownership or non-ownership of the

¹ This and all other translations of quotations originally published in other languages than English are my own translations.

means of production, the possible positions in the social structure go far beyond the bourgeoisie and the working class. This explains, to a large extent, why interest in the middle classes in the Weberian tradition is much more marked than among Marxists.

In the present essay, I start from the premise adopted by both the Marxist and Weberian lineages that class situation is relevant in conditioning political action. I avoid, however, the Marxist rigidity present in the definition of two classes. At the same time, I seek to radicalize Max Weber's intuition that the constitution of classes as political subjects is contingent and conditioned by a multiplicity of factors other than class position in the social structure.

To this end, I draw on contemporary theories of articulation and particularly on the work of Stuart Hall, who uses the term "articulation" to characterize the way in which subjects and discourses are constituted contingently and simultaneously. Note that contingent does not mean arbitrary, casual or fortuitous. Contingency refers here to the fact that class situation may, at specific moments, be the starting point for the articulation of political subjects. There is, however, no automatism or irremediable determination. Moreover, what particular direction the class articulation will take is not predetermined. That is, one cannot define a priori, by theoretical deduction, which "legitimate" class interest will be politically articulated, as happens in the Marxist tradition. In Hall's own words:

[T]he theory of articulation asks how an ideology discovers its subject rather than how the subject thinks the necessary and inevitable thoughts which belong to it; it enables us to think how an ideology empowers people, enabling them to begin to make some sense or intelligibility of their historical situation, without reducing those forms of intelligibility to their socio-economic or class location or social position (Hall 1996: 142).

Accordingly, the purpose of this essay is to identify when and why, in the context of the long-lasting crisis Brazil is going through, the middle classes have articulated themselves as political subjects and how they have intervened and been intervening in different political disputes. Before discussing the terms of the long-lasting Brazilian crisis and the role of the middle classes in it, I first seek to define the spheres or axes that shape the class situation of the middle classes.

2.2 Class Situation

Middle class is, as is well known, a disputed term not only within politics but also within the social sciences. In general, disagreements in the political sciences are linked to the different evaluations of the political role of the middle classes: Do they

tend to be easy prey for right-wing populists or, just the opposite, driving forces for democracy and political governance (Fowler and Biekart 2016)? In the field of social anthropology, debates focus more properly on the different ways of interpreting the everyday experiences of the middle class as well as on the importance of aspects such as cultural and consumption practices for the conformation of class experience (Heiman et al. 2012). Disputes in sociology are usually guided by the critique of readings of the middle class as developed by many economists, consulting companies and most international organizations that tend to define the middle class exclusively by the criteria of income and consumption (Pieterse 2018: 157). When it comes to discussing what the other relevant criteria for defining middle classes are, sociological approaches diverge. While many authors emphasize either the centrality of the type of professional occupation one has or the way people spend or invest what they earn, others stress variables such as cultural capital and class habitus (Clément et al. 2020).

For the purposes of this essay, I bring together debates developed in these different disciplinary fields in order to encompass the various dimensions and variables that shape the class situation of the middle classes in Brazil. Considering these multiple variables makes it possible to understand how, in determined political contexts, the class situation is linked to the articulation of political subjects that publicly seek to defend common interests and positions.

A broad understanding of the class situation as formulated here for the Brazilian case implies considering at least three interrelated axes or dimensions of the social structure:

Income and wealth: The renewed interest in the middle classes in Brazil was first motivated by research on the Brazilian “new middle class” as developed by Marcelo Neri, an economist and former president of the Instituto de Pesquisa Econômica Aplicada - IPEA (2012-2014), the Brazilian government’s think tank for socio-economic issues, among others (Neri 2012). The works published at the time in Brazil align with similar studies developed by international organisations (e.g. Ferreira et al. 2013) which sought to capture the upward mobility of poor groups to the middle strata of income in different countries of the global south in the 2000s. In these studies, the range usually adopted for defining the middle class is US\$10 to US\$50 at purchasing power parity per capita/day.

Even if later scholarship, developed mainly by sociologists, rightly seeks to indicate that class definition cannot be limited to examining income distribution (e.g., Scalón and Salata 2012; Cardoso and Préteceille 2017), the centrality of income in defining class

situation is indisputable.² Along with income, a broader examination of the variations in wealth over time, as studied in more recent work using income tax declarations as a database (e.g., Medeiros et al. 2015), offers important elements for understanding the transformations in the class situation of the Brazilian middle classes.

Use of goods, services and hierarchical social spaces identified with the middle classes: A wide range of case studies conducted in different regions of Brazil allow us to better characterize and qualify, at the local level, general habits and trends of different social classes captured by representative household surveys. If studies based on statistical sources such as the National Household Sample Surveys (PNAD in Portuguese) or the Family Budget Surveys (POF in Portuguese) make it possible to establish consistent correlations, for example, between increased income and consumption of durable goods, investment in education or the search for private medicine (e.g., Neri 2012; Vaz and Hoffmann 2020; Pilotto and Celeste 2018), case studies make it possible to identify class meanings attributed to the use of and access to these goods, services and social spaces.

First of all, it is worth highlighting studies that explore the dynamics of urban land appropriation and use, as well as the role of the stratified real estate market itself in segmenting and classifying the physical space of the city. In this movement, certain neighbourhoods or sub-areas are constituted, physically and symbolically, as spaces of the middle classes (Moura and Januzzi 2019; Nogueira 2020).

Equally relevant are studies that show that despite significant differences between Brazil's distinct regions and cities, and also patent differences between countryside and city, the class experience of middle-class families appears, recurrently and persistently over recent decades, to be associated with the use of some goods and services such as a private car (O'Dougherty 1998; Zandonade and Moretti 2012), private medicine and school (Nascimento et al. 2017), higher education for their children (Lima, Marco Antônio de Oliveira and Robertt 2016) and hiring domestic workers (Pinho and Silva 2010).

Embodiment: The two axes for defining class situation discussed so far, namely income and wealth, on the one hand, and use of and access to certain goods, services and social spaces, on the other, are socio-structural preconditions for belonging to the

2 In most cases, the objection to the exclusive use of the income criterion for the definition of the middle class is based on the emphasis on the importance of types of occupation, as there is a set of "intermediate social positions that are neither the economically and hierarchically dominant positions of the upper classes, nor the dominated enforcement positions of the popular classes" (Cardoso and Prêteceille 2017: 1007–1008). There is no doubt that studying the nature of occupation remains relevant for analyses of the Brazilian social structure, despite increasing fragmentation and informalisation of the labour market. However, because this essay focuses on articulations of class situation and the political engagement of middle classes, I do not take occupation into account.

middle classes. Class situation, however, also involves a relational and interactional dimension. It is within everyday interactions that the class situation acquires concreteness and plausibility; in other words, it is in these interactions that class situation becomes embodied. I understand embodiment as the set of bodily (dress, accessories, body posture, etc.), cultural, and social practices that make visible and validate middle-class situation, making it recognizable and acknowledged both by members of the class itself and by members of other classes. Such practices include internal rituals (family celebrations and trips, shared forms of leisure, rumours and gossip) and boundary demarcation mechanisms with respect to other classes, namely the subservient admiration of the wealthier and the rituals of disciplining and humiliating the poorer (Freitas 2014).

I align my use of the term embodiment, nowadays widespread in various disciplinary fields, with Judith Butler's interpretation and her emphasis on the performative dimension of embodiment processes, where

the body is not understood as a static and accomplished fact, but as an ageing process, a mode of becoming that, in becoming otherwise, exceeds the norm, reworks the norm, and makes us see how realities to which we thought we were confined are not written in stone (Butler 2004: 29).

It follows from this interpretation that, although the materiality of the body (always subject to social decoding), the force of norms and the position occupied by the person in social hierarchies determine the scope of negotiations and mediations possible in a given interaction, it is within concrete social interactions that the class situation is validated and negotiated.

Clearly, the processes of embodiment of/as middle classes are necessarily intersectional moments, in which regional origin, ethnicity and race (Maia and Reiter 2021), gender and sexuality (Corossacz 2014) and even religiosity (St. Cair 2017) appear inseparably linked to the proper marks of class. This implies that groups that have not been historically associated with the middle class are confronted with enormous difficulties to have their middle-class situation recognised and are recurrent victims of social rejection, classism and racism as studies on the Brazilian Black middle class show: "the experience of racism, discrimination and, consequently, of feeling out of place, still characterises the experience of most middle-class Blacks" (Figueiredo 2021: 11).

The dimension of class situation that I treat here as embodiment is recurrently discussed in Brazilian sociology and anthropology through the categories of cultural capital and habitus, as developed in Pierre Bourdieu's sociology of distinction (Bourdieu 1979). It is not my intention here to disqualify, wholesale, the large number of relevant studies that follow this approach. Nevertheless, one cannot ignore the abusive and

often unmediated use of the categories developed by Bourdieu to study class conflicts in contemporary Brazil, a time and a society very different from those observed by the French author. The class situation of the Brazilian middle classes today is very heterogeneous and, as mentioned before, interpenetrated by race, ethnicity and gender relations, aspects that were not – nor could have been – contemplated in Bourdieu's original theory.³ Charles H. Klein, Sean T. Michel, and Benjamin Junge are quite right when they criticise the application of Bourdieusian axioms to study the so-called new middle class in Brazil, whose pattern of behaviour “is not merely an emulation of that of existing middle classes in some ‘trickle-down’ rendition of Bourdieu’s practice theory” (Klein et al. 2018: 92).

3. Recent Fluctuations in the Class Situation of the Middle Classes in Brazil

3.1 The PT Era (2003-2014/2016)

Since the rise to the presidency of Luiz Inácio Lula da Silva of the Workers' Party (PT) in 2003, important changes have taken place that have significantly affected the class situation of the middle classes. With Lula da Silva as president for two terms (2003-2006, 2007-2010) and Dilma Rousseff as president for two terms as well – although the second term was interrupted by her impeachment (2011-2014, 2015-2016) – the PT, despite making enormous concessions to conservative allies in order to form parliamentary majorities, succeeded in implementing a set of policies and actions that caused important shifts in the Brazilian social structure.

This is especially true for the period 2003-2014. The second mandate of Rousseff (2015-2016) is marked by the conjunction of economic and political crises and marks the beginning of the process of dismantling the social gains of the previous years.

Between 2003 and 2013, given the anti-cyclical economic policies adopted and the favourable international environment for most of this period, Brazilian gross domestic product grew by 64%. During the period, social spending also grew significantly and new policies to address poverty were implemented, more than halving the proportion of the poor in the Brazilian population. The minimum wage, set by the government,

3 Even if original and valid, the attempt to add new dimensions to Bourdieu's theory to respond to the challenge of intersectionality, as Maia and Reiter do by using the category racial capital, does not fully convince me (Maia and Reiter 2021). Transformed into capital, race becomes an ontological category, that is, a property of subjects prior to social interactions. This is precisely what I seek to avoid by referring here to embodiment, which, from a relational perspective, allows us to study the dynamic negotiations and combinations of meanings attributed to categories such as class, gender, race and ethnicity.

grew by 75% in real terms during the period and millions of new formal jobs were created annually (Pochmann 2014).

The favourable context allowed a significant number of people to rise from the lower income strata to form the contingent that became known in the Brazilian debate, in line with the vocabulary of large international consulting firms and international organisations such as the OECD and the World Bank, as the new or emerging middle class.⁴ According to Neri's measurements, 51.1 million Brazilians moved between 2003 and 2014 from income classes E and D to class C, joining the 67.9 million people who were already in this income bracket in 2003 (Neri 2019a).⁵

These shifts in the social pyramid produced important effects on the structure of consumption of goods and services. This is exemplified by the increase in the demand for air travel and motor vehicles in circulation. The number of passengers embarking on domestic and international flights in Brazil jumped from 37.1 million in 2003 to 117.1 million in 2014 (Regis 2021). The number of cars and motorbikes circulating, on the other hand, jumped from 27.7 million cars and 7.9 million motorcycles in 2006 to 47.9 million cars and 19.2 million motorcycles in 2014 (Instituto Brasileiro de Geografia e Estatística 2022).

This increase in the income and consumption power of the intermediate strata, when observed from the perspective of the increase in the income of other groups in the same period and taking into account not only household surveys but also tax declarations, must, however, be put into perspective. This is shown by authors such as (Medeiros et al. 2015; Morgan 2017). According to the measurements of the latter, while the real income of the middle 40% of the population grew by 9.2% between 2001 and 2015, the income of the poorest 50% grew by 29.9%, and that of the richest 10% grew by 21.0% in the same period.

Taking into consideration both income and wealth in general, including properties and other assets that can be measured in money, one notices an increasing concentration of wealth in Brazil throughout the current century: When measured by the Gini coefficient, wealth concentration jumped from 84.7 in 2000 to 88.7 in 2015 and 89.0 in 2020. The share of wealth appropriated by the richest 1% of the Brazilian population jumped from

4 Following the sociological critique of the term new middle classes discussed in the previous section, these groups that came out of poverty should be called new middle strata, that is, strata that occupy intermediate positions in the income distribution pyramid. As a sociological concept, class implies contemplating, as was seen, other dimensions such as wealth, access to certain services, goods and social spaces, in addition to the embodiment processes not considered in the economic approach to the "new middle classes".

5 Class C comprises households with a monthly household income of between 2,004 reais and 8,640 reais (US\$847 to US\$3569) at January 2014 prices (Neri 2019b: 16).

44.2% in 2000 to 48.6% in 2015 and 49.6% in 2020 (Credit Suisse Research Institute 2021: 24).

Equally relevant for our purposes in this essay are the political and institutional changes introduced by the PT-led governments. Particularly noteworthy are the policies to protect and reinforce the rights of women, Afro-descendants and the LGBT population which, in combination with the political mobilizations of respective social movements, have contributed significantly to mitigating socio-economic inequalities and even more emphatically power asymmetries between Whites and Blacks, men and women and between LGBT groups and the rest of the population. With this, I am obviously not denying that such power asymmetries remain abysmal. Nevertheless, it is unequivocal that the new public agencies created, the special programmes and various instruments introduced to expand and reinforce rights, and public policies aimed to support women, Afro-descendants and the LGBT population during the PT era contributed to empower these groups (Costa 2018a).

Another set of public policies implemented by PT-led governments and relevant for our analytical purposes concerns the expansion of access to higher education. This involves different modalities of scholarships and subsidised student loans for the payment of tuition fees at private higher education institutions, as well as the incentive to expand the number of places at public universities. The 2012 quota law also had the important impact of establishing that 50% of places at federal universities should be reserved for students from public schools, including Whites, Blacks and Indigenous people according to the demographic representation of these groups in the population of the respective region. These measures together led to an exponential growth in the number of students, jumping from 3.5 million in 2003 to 6.5 million in 2014 (SEMESP 2016: 9), and a significant increase in the participation of Black students and those from the lower income strata in the Brazilian university population (Picanço 2015).

3.2 The Right-Wing Backlash (2016-2022)

As of 2014, the political situation has been completely reversed. The economy entered a sharp recession and gross domestic product, which had been growing at a rate of 7.5% in 2010, fell by -3.5% in 2015 and -3.3% in 2016. Growth rates returned to around 1.5% until 2020, when the crisis aggravated by the pandemic caused the country's economy to shrink by 4.1% (World Bank 2022). The economic crisis that began in 2014 was joined by a political crisis: President Rousseff, elected by a narrow margin in 2014 for a second term that was supposed to last until 2018, saw her government become politically unviable until she was deposed in 2016 in an impeachment process that, although it followed the formal procedures, had its legitimacy and legality

questioned. According to Brazilian legislation, impeachment is only applied in cases where presidents commit an offence classifiable as a “crime of responsibility”. In the case of Rousseff, however, what led to her impeachment was popular rejection and her inability to form a parliamentary majority. The crime of which she was accused, manipulation of public accounts to hide a budget deficit, was not adequately proven, nor does it meet the legal requirements for classification as a crime of responsibility (Soler and Prego 2020).

Rousseff was replaced by her conservative vice-president Michel Temer, who adopted a government programme that clearly penalised the poorest people and minorities who had seen their rights strengthened during the governments ruled by the PT. He abolished agencies that had been created to serve the less privileged population, froze social spending and reduced workers’ social rights. Moreover, beset by serious accusations of corruption, he became a target of pressures from deputies and senators to meet the interests of specific economic groups, particularly the agrarian lobby. This is the political and economic context that preceded the election of Bolsonaro, a far-right congressman elected as a representative of Rio de Janeiro and until then politically irrelevant at the federal level. The legitimacy of his election is also debated since former President Lula da Silva, who had been leading the electoral polls, was denounced for corruption, tried and imprisoned within the scope of the broad actions to combat corruption called Operation Car Wash (*Operação Lava Jato*), and therefore could not run for president (Anderson 2019).

In power since January 2019, Bolsonaro has shown, since his first days in office, a profound inability to conduct a government guided by a consistent and coherent set of actions (Nobre 2020). He appointed right-wing influencers and individuals without adequate training and experience to ministries responsible for large budgets and for the articulation of very complex tasks. In what he did manage to implement, his government can be characterised as a radicalised continuation of Temer’s administration: He sought to dismantle the mechanisms for civil society participation in policy decisions, reduced social rights and, by dismantling control bodies, facilitated the access, use and criminal appropriation of common and public goods such as preservation areas, indigenous reserves, public lands, etc. (Costa and Gonçalves 2019; Rios 2020).

The picture has been dramatically complicated since the arrival of the Covid-19 pandemic in Brazil in March 2020. The irresponsibility and inability of Bolsonaro’s government to adopt the necessary measures to contain the damage caused by the pandemic associated with its denial of medicine and science led to a dramatic health crisis and cost a number of lives unprecedented in Brazil’s history. In this context, many of Bolsonaro’s voters and even political allies who contributed to his election as president have distanced themselves from him. He now counts on the support of a

radicalised minority with little regard for democratic institutions (Rennó et al. 2021). To save himself from imminent impeachment he has, in effect, handed over the power to control the federal budget to the most clientelist hosts in the Câmara dos Deputados, the Lower House of the Brazilian congress (Carnut et al. 2021).

The inequality, income and poverty indicators clearly reflect the impacts of the triple crisis: The percentage of the poor gauged by individual income measurements that had fallen from 21.8% in 2003 to 8.4% of the population in 2014 grew again and reached 11.1% in 2017 (Neri 2019b). During the pandemic, the percentage of poor has oscillated according to the schedule of emergency aid payments offered by the government but has remained, on average, above pre-pandemic levels (Neri 2021).

The analysis of the loss of labour incomes reveals the very differentiated impact of the triple crisis and particularly of unemployment on different income strata. Between the fourth quarter of 2014 and the second half of 2019, the poorest 50% lost 17.1% and the middle 40% lost 4.2% of their income, while the richest 10% saw their income grow by 2.6% – for the 1% at the top of the pyramid, income grew by 10.1% (Neri 2019b: 5). These trends have persisted and deepened in the pandemic period, even though the richest, unlike in the previous period, have also suffered a loss of labour income. Between the fourth quarter of 2019 and the second quarter of 2021, the poorest 50% lost 21.5%, the middle 40% lost 9.0% and the richest 10% lost 7.25% of their labour incomes. It is worth noting that the losses were proportionally greater for women and the elderly and for the population of Brazil's north-eastern region (Neri 2021).

3.3 Heterogeneity and Volatility of the Middle Classes' Situation

When observed from the three axes or markers of class situation described in the previous section – income and wealth, access to goods, services and social spaces of the middle class, and embodiment – the historical period analysed here (2003-2022) is marked by diversification and discontinuities in the class situation of the Brazilian middle classes. With regard to income and wealth, the middle-income strata, according to Neri's parameters, jumped from around 38% of the total population in 2003 to almost 60% in 2014 (Neri 2019a). Qualitative studies show that the exponential growth of the population occupying intermediate income positions is accompanied, in terms of the consumption of goods and services and access to social spaces, by a profound process of diversification and pluralisation. That is, if it is true that the groups that moved from poverty to the middle strata compete for access to the goods, services and spaces of the established middle class, the newcomers also induced the creation of new goods, services and spaces socially coded as middle-class markers.

This generates a heterogeneous social topography made up of traditional spaces still controlled by the established middle class (certain neighbourhoods and residential condominiums, recreational clubs, theatres, etc.), new social and consumer spaces which emerge or are recoded by the newcomers and which are not disputed by the established middle class (reconfiguration of peripheral neighbourhoods, (re)creation of musical genres, as in the case of *sertanejo* music or Brazilian funk) as well as goods, services and social spaces which become the target of disputes between different segments of the middle classes, as is the case of city road space, saturated by the exponential increase in the number of vehicles in circulation, air travel and access to higher education.⁶

In this increasingly heterogeneous social topography, the processes and strategies of embodiment of the middle classes have also diversified. That is, the ways of being middle class, which were already diverse from a regional point of view, have also become more pluralized with respect to race, ethnicity, religion, previous spaces of socialization, etc. As a consequence of social mobility and the diversification of middle-class corporalities, everyday practices of affirming and decoding middle-class situation have become less univocal and more uncertain. Known and previously efficient strategies to perform middle class belonging and demarcate social boundaries before other groups no longer present the same efficacy.

These uncertainties and insecurities generated by the dislocations and ruptures in the processes of middle-class embodiment, experienced in the everyday sphere, are accompanied as of 2015 by a brutal undermining of the material bases which sustain the situation of the middle class. For the established middle class, in addition to the aforementioned concentration of wealth by the very rich, prices for goods and services that have historically functioned as markers of middle-class situation such as private education and private medicine and the hiring of domestic workers have hugely increased (Gethin and Morgan 2018: 4–5).

In the case of the newcomers, the volatility of their class situation has risen dramatically in the context of the deepening economic crisis, since, from recent prosperity, they have no assets, are more vulnerable to job and income loss and are particularly indebted.⁷

6 The reference in this context to the established middle class, that is, those segments that already composed the intermediate income strata before the PT came to power in 2003, and the outsiders or newcomers, namely, those segments which arrived in the intermediate strata after 2003, refers back to my previous works on the Brazilian political crisis (among others Costa 2018b). Even if the dual representation of two segments of the middle class is too narrow to account for the heterogeneity of the Brazilian middle classes, the distinction inspired by the established-outsider figuration, described in the classic work of Elias and Scotson ([1965] 1994), helps to understand the disdain of the traditional Brazilian middle class for the so-called “emerging middle classes”.

7 Vaz and Hoffmann (2020: 7–8) show that between 2008 and 2017, the expense that grew the most in Brazilian family budgets is debt repayment, which saw an increase of 64% in the period.

Their return to poverty is a permanent threat and a frequent and painful experience in their lives (Neri 2021).

4. Articulations of the Middle Classes as Political Subjects

4.1 Interpretations of the Brazilian Crisis

After having discussed the recent fluctuations in the class situation of the Brazilian middle classes, we can return to our central question: How do the variations in the situation of the Brazilian middle classes correlate with their constitution and action as political subjects in the Brazilian crisis? In this context, the particularly relevant question is what led the Brazilian middle classes, or at least significant sectors of them, to support and contribute to elect Bolsonaro, a president who was until then a little-known politician, without any relevant record of service to the country and who built his victorious campaign on the basis of a discourse characterised by misogyny, homophobia, racism, and ultraconservatism in the area of morality and family and ultraliberalism in economic policy.

Although I do not claim to cover all the rich and vast bibliography available on the long crisis in Brazil, it seems possible, for the purposes of this essay, to classify the existing contributions according to three main explanatory matrices: social-structural factors, ideological factors and cultural factors.

The socio-structural approaches highlight the change in the profile of the PT voters which, over successive elections, increasingly shifted from the educated middle classes of the centre-south of the country to the lower income strata, the less educated and the north-eastern region. Amory Gethin and Marc Morgan seek to explore the relationship between voting motivation and economic gains and losses both for different income strata and in combination with other factors such as race, schooling, region and religion (Gethin and Morgan 2018, 2021). They find a consistent positive correlation between voting for or against the PT and the groups that gained or lost economically during the party's governments and in the years that followed. According to the authors, the situation of the so-called squeezed middle classes is particularly relevant: even in times of rapid economic growth when all strata experienced income gains, they saw that their incomes rose by much less than those of the richest and the poorest.

For André Singer, the links between electoral behaviour and socio-economic changes requires an understanding of the contradictions intrinsic to what he calls Lulism, i.e., the class alliance that the PT formed to govern, which sought, as he understands it, to reconcile the interests of the organised working classes, different fractions of

the bourgeoisie and the middle classes (Singer 2012). In their specific actions, PT governments particularly benefited the subproletariat, that is, the informalised mass of workers with uncertain occupations and precarious labour ties. When Rousseff tried, however, to deepen the social reformism initiated by the Lula governments by combining developmentalist policy reforms with an anti-corruption programme, the contradictions inherent to the class alliance in Lulism were exacerbated and the alliance collapsed (Solano 2018).

Armando Boito Jr. and Tatiana Berringer also understand that the PT governments represented an alliance, but in their view, “the Brazilian domestic *grande bourgeoisie* always maintained control of the alliance so as to obtain from the state the guarantees of “favouritism and state protection in the competition they undertake with foreign capital” (Boito Jr. and Berringer 2013: 32). For Boito Jr. the collapse of the class alliance stitched together by the PT can be seen as the product of Operation Car Wash, which, articulated with the US State Department, “politically instrumentalized the fight against corruption to damage Brazilian companies and the PT itself, satisfying interests and political expectations of foreign capital and the upper middle class” (Boito Jr. 2021: 6).

Alfredo Saad-Filho seeks to understand Bolsonaro’s election in the context of what he calls authoritarian neoliberalism (Saad-Filho 2021). According to his interpretation, the current phase of neoliberalism follows previous periods of continued economic and rights losses for the majority of the population. In this context, leaders are emerging who present themselves as oppositional to conventional politics and established elites, promising to restore the losses suffered in order to win the support of the voters. However, these leaders, “when in power, implement programmes intensifying neoliberalism under the veil of nationalism and more or less explicit racism” (Saad-Filho 2021: 133). This generates new frustrations, creating a fertile ground for further cycles of deepening authoritarianism.

Works focusing on ideological factors draw on various sources and methods such as quantitative surveys of electoral behaviour (Fuks and Marques 2020), discourse analysis (Messenberg 2017), the analysis of right-wing organisations and networks, digital ethnographies and big data (see different contributions in Solano 2018; Solano and Rocha 2019) to study the dissemination of far-right discourses and ideologies. These studies conclude that groups on the right of the political spectrum have managed to promote a vigorous increase in their power to disseminate their discourses and ideas both on social media and the Internet in general, as well as through organised social movements and street demonstrations, and even through their penetration of conventional mass communication vehicles, namely radio, television and the print press. At the same time, electoral disputes in Brazil, according to this reading, have become increasingly guided by ideological disputes so that the decisive factor for

electoral choices in the 2018 elections when Bolsonaro was elected president, was political ideology:

In 2014, Brazilians started positioning themselves more on the left-right scale and, in 2018, showed greater coherence between their location on this scale and their party identification and voting. Moreover, their opinions and positions regarding some of the issues that divide left and right in Brazil today proved to be good predictors of voting (Fuks and Marques 2020: 417).

Contributions dealing with ideological factors are particularly illuminating in explaining how the political strategies used by the right and mechanisms such as hate politics, culture wars, post-truths and the construction of public enemies have redefined the lines of political conflict in Brazil. Themes that had articulated political struggle in previous decades, such as the strengthening of democracy and social justice, lost relative importance with respect to themes such as family models and standards of sexuality and morality. On the other hand, electorally relevant themes were re-signified in moral language so that, for example, public security became a dispute between good people and bandits and social mobility became exclusively synonymous with personal merit. Corruption is also re-signified in the right-wing discourse. It is no longer a systemic problem located at the interface between state, political system and economy, but a product of the lack of decency and composure of PT politicians and particularly of former President Lula da Silva. The studies also make evident the role of Operation Car Wash and its sensationalist media coverage to personalise corruption and to reinforce public rejection of the Workers' Party (Lopes et al. 2020).

The approaches that seek the explanation for the far-right backlash in the country in *culture* tend to understand the adherence to the right as the reaction to the loss or the threat of loss of privileges inscribed in Brazilian culture marked by multiple hierarchies in the areas of sex and gender, sexuality, race and ethnicity, social origin, etc. To analyse the threat to racial privileges, Patrícia de Santana Pinho uses, in a very enlightening way, the concepts of injured whiteness and aspirational whiteness:

while injured whiteness refers to the traditional Brazilian middle class and aspirational whiteness refers to the Brazilian lower class, these two phenomena support one another, and they reveal the interclass complicity necessary to sustain the power of whiteness (Pinho 2021: 66).

Building on the term used by Pinho, one could say that, in diverse fields, studies show that adherence to the right is motivated by injured supremacy caused by the transformations that have taken place in the last two decades in Brazil. Accordingly, studies document the “destabilisation of hegemonic masculinity” by female empowerment (Pinheiro Machado and Scalco 2018: 57), as well as the radical defence of traditional family

and heteronormative sexuality supposedly threatened by the pluralization of existing models of sexuality and family (Almeida 2019) and violent reactions of the established middle class against the loss of privileges (Costa 2018b). What finds no parallel in these other studies is Pinho's reference to an equivalent of aspirational whiteness, that is, forms of adaptation and mimicry of the oppressor group as a strategy for upward mobility. This is the originality of Pinho's work. The author is able to explain not only why oppressor groups adhere to the right but also why oppressed groups accept and adhere to the discourse of meritocracy (Pinho 2021).

4.2 Intersectional Articulations of the Middle Classes

The three strands of interpretation of the far-right backlash in Brazil, even if they do not deal exclusively with the role of the middle classes, provide relevant insights for understanding how the middle classes have constituted themselves as political subjects in the long-lasting Brazilian crisis. Nevertheless, they leave central questions associated with the topic unanswered. If we start our analysis from studies that explain adherence to the right according to socio-economic or cultural determinations, we still cannot say why a large part of the middle classes, both the established and the newcomers, *do not* adhere to the right. It is also difficult to explain why even sectors of the middle class which had voted for Bolsonaro have now distanced from him while the supposed cultural or socio-economic determinants that seem to have motivated their electoral choice have not undergone substantive changes since then. Research focused on ideological factors, in turn, explains *how* but not *why* the right has grown. Nor does it explain the right's loss of influence since 2019. That is, its structures and mechanisms of political action are stronger than ever, but still its discourses have lost some of their powers of persuasion and mobilisation.

It seems necessary to recognise that the constitution of the middle classes as political subjects is not explained by univocal nexuses of determination, such as those described in the three currents discussed above. Rather than something inevitable and previously determinable, the political positions assumed by the middle classes recently in Brazil are heterogeneous, changeable and contingent.

Accordingly, what is needed is to reconstruct the contingent articulations between the class situation and the political positions assumed by the middle classes, always understood in the plural. Paraphrasing Stuart Hall, we must understand the circumstances that led to diverse discourses – from right-wing authoritarian ideologies to emphatic discourses in defence of democracy and minority rights – and different segments of the middle classes to match, generating the reciprocal constitution of discourses and subjects.

As shown above, the situation of the middle classes throughout the period studied underwent important shifts at the three levels: at the macro-structural level of income and wealth; at the mesosocial level of the disputes over goods, services and hierarchical social spaces; and at the microsocial level of embodiment. In the period from 2003 to 2014, the social ascension of the newcomers led to competition between them and the established middle class. These reconfigurations of class situation generated fissures in the social fabric and new lines of political conflict. With the deepening of the economic crisis from 2015 onwards, the class situation of the middle classes and more particularly of the newcomers became even more volatile, generating new uncertainties, anxieties and social conflicts.

The institutional channels of mediation, regulation and negotiation of these conflicts, namely, the state and the political system, failed to fulfil this function. Even before the economic crisis that began in 2014, and particularly in the outbreak of street movements in the so-called journeys of June 2013, a profusion of protests of varied nature and ideological orientations already indicated the existence of a mismatch between political expectations, experiences and the capacity of the political system to process and offer adequate responses to these demands (Nobre 2013).

In the context of the deepening economic crisis from 2015 onwards, the state and the political system became even less able to respond to the justified concerns of the middle classes in the face of the shattering of Rousseff's parliamentary base and the imminence of the impeachment process.

This is the institutional context in which the reconfigured class situation of the middle classes and their positions as political subjects were articulated, whether on the individual level of electoral choices or through collective demonstrations in social networks, in street protests, or in more institutionalised social movements and activist organisations and networks. Segments of the middle classes, including both established middle classes and newcomers, found in authoritarian and anti-establishment ideologies discourses that allowed them to articulate their political dissatisfaction. Other segments, in contrast, rearticulated their support to the Workers' Party.⁸

The political division and polarisation that has its epicentre in the middle classes reached its peak in the 2018 elections when the campaign of presidential candidate Bolsonaro, followed by several other candidates for state governments and state and federal legislative mandates, managed to transform the various issues voters

8 Luciana Tatagiba and Andreia Galvão study 1,285 protest actions between January 2011, when Rousseff assumed the presidency and August 2016, when she left office. The authors show that only 6.2% of the protests identified in the period were led by anti-PT groups. Most of the protests were led by "progressive sectors linked to the defence of rights, allied with the PT government or composing a left opposition" (Tatagiba and Galvão 2019: 84).

considered relevant into a dispute between left and right. Mirroring the successful electoral strategies of other right-wing candidates worldwide, particularly Donald Trump, Bolsonaro presented himself as the anti-system candidate who, with a firm hand, would solve the country's various problems: corruption, the gaps in public security and the economic crisis (Lopes et al. 2020).

The misogynistic, moralistic, classist and racist discourse echoed particularly among men, Whites, the established middle class and traditional families who have seen their supremacy scratched by the social and economic changes of the previous period. This explains Bolsonaro's proportionally greater electoral success among male, White, higher income strata and evangelical voters. Bolsonaro's campaign and those of several other candidates who followed the same rhetoric succeeded in building a comprehensive discourse capable of articulating political dissatisfactions by referring to different class situations in their multiple intersections with race, gender, sexuality and religion.

The campaign of Fernando Haddad, the candidate who took Lula's place after he was arrested and prevented from running in the presidential elections and faced Bolsonaro in the second round of the 2018 elections, relied on intersectional discourses opposite to Bolsonaro's: He defended the fight against social inequality and the expansion of the rights and achievements of women, Blacks, Indigenous people, and LGBT groups. This explains his good electoral results among Blacks, women and the LGBT population. Equally significant are regional differences. Haddad was the candidate with the most votes in the Northeast, a region that particularly benefited from the policies implemented by the PT governments. Bolsonaro won in all other regions. Table 1 summarises these results.

Table 1. Electoral preference according to different characteristics in the run-off election (by valid votes), 2018

Features	Candidates	
	Bolsonaro	Haddad
Men	61%	39%
Women	51%	48%
Whites	68%	32%
Browns (pardos)	54%	46%
Blacks (pretos)	45%	55%
Income up to 2x minimum wage	44%	56%
Income over 10x minimum wage	66%	34%
Catholics	51%	49%
Evangelicals	69%	31%
Heterosexuals	58%	42%
LGBT	34%	62%

Source: Datafolha 2018.

Predictions for the 2022 presidential elections indicate important changes in voters' behaviour since 2018. According to a representative survey released in May 2022, an important portion of voters who voted for Bolsonaro in 2018 will vote for Lula in 2022, who is running for president after the annulation of his previous condemnations. According to the poll, Lula has the preference of 48% of voters, Bolsonaro of 27% in the first round of elections. Bolsonaro wins in the income bracket above 10 minimum wages and among entrepreneurs. Lula has large advantage among women (49% for Lula, 23% for Bolsonaro), voters from the Northeast region (62% to 17%), Blacks (57% to 23%), Catholics (54% to 23%), and unemployed workers (57% to 16%) (Tavares 2022). Even among Evangelicals, Lula and Bolsonaro are now technically tied. In a second round Lula would win against Bolsonaro with 58% of the vote against Bolsonaro's 33% (Linhares 2022).

5. Conclusions

Historically marked by abysmal social inequalities, Brazil, for almost ten years now, has been living with similar abysmal political divisions that hinder institutions and truncate daily relations. The middle classes, whatever the definition adopted, have played a key role in producing political polarisation. A wide range of research from various disciplines have sought to study and understand the reasons for the polarization and especially the overwhelming political turn that culminated in the election of a far-right president.

Although rich and at least in part analytically sound and sophisticated, the available literature tends, as I have tried to show, towards structural, cultural and ideological determinisms.

To escape these determinisms, I draw on Stuart Hall's political sociology in order to understand the link between the class situation of the middle classes and their constitution as political subjects of various shades as contingent intersectional articulations. The emphasis on contingency obviously does not imply a belief that political developments are fortuitous and detached from social structures. Nor does it ignore the existence of groups with deeply held ideological or cultural convictions who consistently adopt, over long periods of time, political attitudes compatible with these beliefs. However, this is not the case of the Brazilian middle classes. Taken as a whole, the middle classes have shown a very heterogeneous and changing political trajectory over time. They adhere to discourses and make political choices based on the power of these narratives to capture, in given circumstances, their anxieties, expectations, claims and aspirations.

My emphasis on intersectionality, in turn, stems from the need to recognize that class situation taken separately from gender, sexuality, race, etc., is a mere analytical abstraction. Within all three axes that make up the class situation – income and wealth, access to hierarchical goods, services and spaces, and embodiment – the intersections between class, race, gender, sexuality, etc. are obvious. The constitution of middle-class political subjects is also an intersectional process, as is evident not only in their electoral behaviour, but also in their political mobilizations.

The contingent character of the articulations between (intersectional) class situation and political positions opens up possibilities for a less unequal and divided future for Brazil. The middle classes, even those who voted for Bolsonaro not out of protest, but because of his convictions, may revise their positions if they find discourses in favour of equality and democracy that, in the face of new circumstances, better translate their anxieties and expectations. The bad news is that this is not the only possible outcome.

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Contact

Coordination Office
Maria Sybilla Merian Centre
Conviviality-Inequality in Latin America

Rua Morgado de Mateus, 615
São Paulo – SP
CEP 04015-051
Brazil

mecila@cebrap.org.br

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