

Incongruența
statusurilor

STATUS INCONGRUENCE

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The phenomenon sociologists have labeled "status incongruence" appears also in the common parlance of many languages. Expressions like "nouveau riche", "déclassé", "roturier" and "parvenu", demonstrate that people perceive the incongruence between various statuses. The popular dictum "the heart on the left, the pocket on the right" expresses such an incongruence of positions and feelings.

As a sociological concept, status incongruence is of relatively recent vintage. It was concocted some time after the adoption of the notion of "status", following the discovery of Max Weber's writings on this subject by some American sociologists in the late 1930s. In ten year period, around the 1950's, some twelve articles were published on status inconsistency, most of them in the *American Sociological Review*. These articles had a cumulative effect. At a certain point, in the 1960s, it was felt that the debate on this topic had been saturated. In the absence of more empirical evidence, the theoretical discussion on status incongruence stagnated, but in the meantime the concept has been diffused in textbooks and compendia.

After some neglect, the concept of status inconsistency has been reinvigorated over the past two decades, as sociologists from both sides of the Atlantic have acknowledged a "decline of social classes". However, in spite of the fact that social class has been dethroned, social inequalities persist.

The concept of status incongruence is a companion of the theory of cross-pressure. The first article focussing directly on status incongruence had appeared in the same year (1944) as *The People's Choice* by Lazarsfeld, Berelson and McPhee. The two notions remain nevertheless distinct in sociological literature, because they respond to two different analytical needs.

The frequency of status incongruence increases during periods of social upheavals, such as during the Weimar Republic, the economic depression in the USA



in the early 1930's, and in Russia after the implosion of the Soviet regime. During the two decades prior to the French Revolution of 1789, the incidence of status incongruences was particularly high.

In emphasizing the revolutionary potential of downward mobility – which he calls the "proletarianization of middle classes" – Marx has paid little attention to upward mobility and to the effects of status incongruence. This neglect has been considered by some scholars as one of his more glaring errors (Lopreato and Hazelrigg, p. 445). In contemporary sociological literature the notion of status incongruence is related to role theory, to rational theory, to the theory of relative deprivation, and to the theory of social movements.

This analysis considers only advanced Western societies, partly because the empirical evidence on status incongruence is available primarily for these countries, and partly because social mobility and its impact on status incongruence is a less wide spread phenomenon in the developing countries.

Status Inconsistency as a Correction of Weak Correlations. For long-time in sociological research correlations between the levels of social stratifications and other variables were rarely as significant as expected according to the hypotheses and the theoretical frameworks that had been adopted. Even when the rudimentary dichotomy of manual versus non-manual was abandoned and more categories were taken into consideration, the empirical results did not support satisfactory explanations. And even when "class" as a rigid and restricted concept was largely replaced by the occupational-status dimension, the research strategy had not been sufficiently improved. Certainly, the emphasis on status groups is one of Weber and Pareto chief corrective thrust made into Marx's theory (Lopreato and Hazelrigg, 83). Nevertheless, an essential approach was still missing until the 1950s, that of status inconsistency, which marks a step forward in sociological thinking. It has been demonstrated that the

consistency or inconsistency of a person's status which is based on various criteria is a better predictor of social behavior than is the level of status which is based on a single criterion.

From Social Class to Status Inconsistency. Status incongruence is generated by gaps in income, occupation, education, ethnic origin, and by other inconsistencies between the social position in one domain and the relatively inferior status along other dimension. Status incongruence can be found in census results by crossstabulating of various indicators like education, income, professional hierarchical position, qualification, racial origin, and so on. There is a logical relation between the spread of status incongruencies and the weakening of social class consciousness.

Status inconsistency has become an essential aspect of the social stratification in contemporary post-industrial society. It is exacerbated by the growth of the middle classes, and by the decline of the peasantry and the industrial working class. Vertical mobility is the main source of status discrepancy. Most studies on social mobility have focused on upward mobility, particularly during the postwar period of economic development. But in more recent times, downward mobility has become equally important. Today, social mobility consists mostly in what, Lipset and Zetterberg called four decades ago "the interchange of ranks" (p. 565): for every upward move, there must be a downward move. What was then only a hypothesis is today empirically confirmed: "some proportion of the children of the middle class fall in socio-economic status; some do not have the abilities to complete higher education or to get along in a bureaucratic hierarchy, and fall by the wayside. Whatever the reason that some persons of middle class origin move downward, they leave room for others of lower-class background to rise" (p. 570). Today, millions of Europeans and Americans born into the middle classes are in such incongruent situations. The downward move can be intragenerational or intergenerational.

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Another source of status incongruence is the liberation from primary social groups, particularly religious communities and family ties. More and more through schooling, individual promotion escapes the constraints of family background. For this reason, status inconsistency is a fertile ground for individualistic tendencies.

The concept of status inconsistency brings up the concept of status crystallization, proposed by Gerhard E. Lenski as a non-vertical dimension of social status. Strong or weak, status crystallization refers to the degree of incongruence or coherence of a person's ranking according to various criteria. A strong status crystallization implies that a person is rated consistently by all important criteria, whether the rating is high or low. Today, a large part of the population in Western societies finds itself in a situation of weak status crystallization. Solid social class can exist only if the majority of the population experiences a strong status crystallization.

One of the most visible varieties of status incongruence occurs among school teachers, who today are more numerous than were the workers in the heavy industrial plants of four decades ago. For many teachers there is a serious gap between the level of their education and role in society, and the level of their income. The leftist orientation of the majority of teachers in most European countries can be better explained in terms of status incongruence, rather than in terms of class. Today, even some college professors experience such an incongruence.

Comparing status incongruence of today and yesterday, two new, important categories have become prominent over the last two decades: the "intellectual proletariat" and the "ethnic achiever" (as opposed to the skidder).

The spread of education in most advanced societies has highlighted the need of post-industrial economy for highly educated people. Today, two thirds of the people aged 18 are still in school. At the end of their college years, most of them do not find a job which correspond to their expectations in terms of intellectual and

economic rewards. It is in this category of the population – young educated people "with a diploma in their pocket" – that the rate of unemployment is the highest in most West European countries. This overabundance of graduates results from the incapacity of our highly technological society to absorb them in "interesting" occupations, the existing ones being protected as they are by unions. This imbalance between level of education, the quality of the job, and the amount of income, generates status incongruences for the "over-educated" young people. The advanced, post-industrial society, in search of productivity, replaces people with machines, producing a new kind of educated proletariat, born into the middle class. In Western Europe in the last decade (except in Germany), one of every four or five young people under the age of 25 was unemployed, and others were pushed down into "degraded" jobs. Those who accept a job beneath their abilities, a "degraded job", represent one of the most frequent varieties of status incongruence, a "reserve army" of alienated people.

The "ethnic achiever" is a new variety in Western Europe and an old one in the United States. Frequent cases of status inconsistency can be found among ethnic and racial minorities in Britain, France, Germany, Belgium, the Netherlands, Switzerland and Austria. Immigrants of European origins within Europe are integrated and assimilated in a single generation, the best example being the eight million contemporary French citizens of Italian, Spanish, Portuguese, Polish or Armenian origins. The sons of these European immigrants are not normally in a position of status inconsistency. When language is combined with ethnicity and religion, as with immigrants from the southern rim of the Mediterranean, the integration process takes two generations, and the younger generation often experiences a status incongruence. When color of the skin is added, the difficulties of integration are compounded. Many immigrants from South Asia or Africa feel excluded from the host society. Nevertheless, a substantial minority are economically well integrated, and many of them climb on the



income ladder. They are "ethnic achievers", more than completely assimilated immigrants. They are deeply rooted in status incongruences.

In Europe, these two varieties of status incongruence contrast with a social category of status crystallization at the bottom of the society. According to a recent survey by OECD, almost one fourth of the adult population in Western advanced societies is functionally semi-illiterate, and co-exist with a high proportion of functionally over-educated younger adults. The strong status crystallization arises from the fact that these semi-illiterates are also those who receive the lowest salaries, those who perform the most menial work, and the large majority of them are of non-European origin. This status crystallization which occurs in Europe has a similar and more deeply ingrained counterpart in the United States.

Minority Status and Status Incongruence. In many studies on electoral behavior (which are preferred because of the availability of statistics), particularly those conducted by survey research, the issue of social context has been neglected. Only the characteristics of the individuals were taken into consideration, while the parameters of the social milieu were ignored. With some notable exceptions, too many sociologists have forgotten that the behavior of people is conditioned by their social context. This mistake has been denounced by the German sociologist Erwin Scheuch as the "individualistic fallacy", a complement to the "ecological fallacy". The direct consequence of "individualistic research" is the dismissal of the notion of "minority", in spite of the fact that its importance has been repeatedly demonstrated. Examples are found in the contrasting behaviors of the same "unidimensional category", whether they are a frustrated minority or a dominant majority: for instance, Irish Catholics who vote for the leftist party in Britain versus "good" Catholics who vote conservative in France or German Catholics who vote for the Christian-democratic party; or industrial workers who live in densely populated working

class areas and the same kind of workers living in middle-class districts. These notions of "minority context" and "majoritarian context" are directly related to the issue of status incongruence, because in many places minorities live in a more or less hostile environment. In such cases, three concepts are jointly involved: status incongruence, minority complex and cross-pressure.

Contradictory propositions have been suggested concerning the political effects of upward and downward mobility in terms of status incongruence. According to some scholars, upward mobility favors a conservative orientation, and downward mobility a liberal-leftist tendency. Others scholars have arrived at the opposite conclusion. This confusing situation can be explained by the neglect of the social context by those who extrapolate at the national level the results obtained at a local level. As a matter of fact, most studies on status incongruence have been conducted in particular cities (including Lenski's study). It is a pitfall to generalize from a series of local monographs, which taken together, do not represent a truly national sample. "Consistency theory seeks to show that predictable effects result from the combination or interaction of statuses, and that these effects differ from the effects of several independent variables" (Rossides, p. 87). But in practice it is difficult to weigh the importance of each variable in the social context. In one case it may be a question of race, in another, income, and still another professional position. Extrapolated at national level these variables conceal important variations across local social contexts.

Status Incongruence and Individualism. Most frequently, status inconsistency refers to individuals, and not to collectivities. The incongruence of status is a characteristic of a relationship between individuals. When the individual cannot raise the lower factors of the incongruence he tends to avoid those people who react to them (Malewski, 306). He makes an individual move. If the individual can raise the lower factor, "he has a natural tendency to

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think of himself in terms of that status or rank which is highest, and to expect others to do the same, (but) others, who come in contact with him have a vested interest in doing just the opposite, that is, in treating him in terms of the lowest status or rank" (Lenski, 87). Even in this case the relationship is between individuals. Vertical mobility separates ascending individuals from non-mobile peers who remain in their status of origin. A high rate of individual upward mobility breaks the unity of the social class, through an effective promotion of certain people and by generating, in the minds of others, expectations of moving out of the class to reach a better one. As R. Dahrendorf has noted, a high rate of upward mobility favors individualism to the detriment of class consciousness.

However, high rates of downward mobility may have the opposite effect, favoring, as Marx has emphasized, the spread of class consciousness. Then, the tendency is not so much to leave the group as to identify oneself with others in the same situation of incongruence of status. In some social contexts which aggregate individuals, for instance, large factories, mines, railway, working class suburbs and ghettos in large cities, the phenomenon of individual status incongruence blooms into a collective social consciousness and a "minority complex".

Configurations of Status Incongruences. The amount of status inconsistencies depends of the configuration of three dimensions, that may be dichotomised for analytical purposes.

a) Culturally homogeneous societies versus heterogeneous societies. In recent decades, immigration in Western countries has been of a different origin that in former times. In most cases, immigrants coming from Western Europe to the US and Canada require only two generations for complete assimilation into the dominant culture. More recent immigration in Western countries came from South, from the southern rim of the Mediterranean and from Africa. Their distinctive characteristics are not only religious and linguistic, as

those of the older waves of immigrants were, they also differ in skin shade. Their integration requests more than two generations and many of them manifest a preference for multiculturalism, that is, for a recognition and institutionalization of ethnic diversity. Such celebrated diversity is presently a source of status inconsistencies, but may have different effects in the future.

b) Segmented versus fluid societies. Heterogeneous countries may be segmented or fluid. The segmented societies are divided into religious or linguistic communities as in the case of Belgium and Northern Ireland or into "pillars", as in the Netherlands until the middle of 1980s (Lijphart). In such societies there is little room for ethnic status inconsistency. To the contrary, in fluid societies the crossing of vertical and transversal cleavages is relatively frequent, and generates incongruences.

c) High versus low vertical mobility. Another dichotomy is related to the amount of vertical social mobility on the economic scale, which may be relatively high or relatively low. That a high vertical mobility, either upward or downward, increases the frequency of incongruence of statuses is a well-established fact.

These three factors have a cumulative effect on the proportion of people experience an incongruence of statuses.

Status Incongruence at the Elite Level. What is missing in Pareto's "circulation of elites" is the concept of status incongruence. This lacuna is surprising in the writings of someone who has emphasized so much the importance of upward and downward social mobility. By applying the concept of status incongruence to the highest levels of the society, elite studies could be greatly enhanced. The psychological portrait of some of the world's most famous painters could be better understood in the light of status inconsistency. The biographies of masters such as Michelangelo, Bellini, Jerome Bosch, Francesco Goya, Vincent van Gogh, Henry Toulouse Lautrec, could be enriched by an interpretation in terms of



status incongruence. Many novelists, including Dostoiewski, Tolstoi, Stendhal, Balzac, de Lampedusa, Proust and Alexandre Dumas have, in their own style, analyzed the psychological aspects of status inconsistency, even if they have not explicitly used these sociological words. One of the main themes of Stendhal's *Le Rouge et le Noir* and of de Lampedusa's *Gattopardo* is status inconsistency. The most popular case is the rich man's daughter who becomes inamorated of a young man of lower status. Neither should we forget Horatio Alger. No sociologist has ever tried to explore the hundreds of cases of status incongruence described by famous writers, starting with Shakespeare's characters, Romeo and Juliette.

The concept of status incongruence should be applied even to saints. The best analyses of the personality of the evangelist Paul have been written by theologians and religious historians who, without using explicitly the notion of status inconsistency, have used it implicitly. The subtitle of Dieter Hilbrand's book *Saul-Paul, A Double Life*, is very significant. M.S. Baslez insists upon the status incongruence of Saint-Paul: born as a Roman citizen but at the periphery, in Syria; he was a stranger in Ephesus; a polyglote Jew, an apostate and the son of a pharisean, he was rejected as a missionary in many communities. Paul had accumulated many incongruencies. Moses, as the nephew of the pharaoh, and Mahammad, as the poor husband of a rich wife, are incarnations of status inconsistencies.

The use of the concept of status incongruence is appropriate for a better understanding of political leaders, from Spartacus to Robespierre, from Trotsky to Castro and many other revolutionary leaders. There are in the literature numerous examples concerning the status incongruence of athletes, clergymen, Jewish businessmen, politicians, poets and movies stars. But this notion has been insufficiently exploited to explain the metamorphosis of labor leaders. The concept could even be applied to sociologists themselves for a better understanding of the theories

and motivations of great scholars like Pareto, Michels, Veblen, Sorokin, Mills, Lazarsfeld and others.

The Relevance of Status Incongruence Today. The frequency of status incongruence in advanced societies today is many times higher than it was during previous generations. This upsurge is a result of increasing upward and downward economic mobility, of the increasing ethnic heterogeneity of Western societies (as a consequence of massive non-European immigration) and of a better perception of inequalities and of the spread of "multiculturalism", as opposed to the doctrine of melting-pot, particularly among the so-called "second generation", which is composed of the sons and daughters of immigrants.

Four decades ago, status incongruence was in most cases a question of an imbalance between education, income, occupation, religion and gender. Today it originates primarily in the ethnic and racial intermingling. Meanwhile, religious differences have become less prominent.

In most Western societies, on both sides at the Atlantic, a homogeneous majority no longer exists anymore. Any conceivable majority is necessarily composed of multiple minorities of all kinds. The advanced society is a multidimensional society which includes many parallel hierarchies. The political game consist precisely in building coalitions of minorities in order to crystallize a temporary and instable political-electoral majority. In almost all these countries the leftist party (in the geometrical sens) has become the party of amalgamated minorities, of those who experience frustrations generated by status incongruences and by the psychological complex of belonging to a minority. In the US, the electorate of the Democratic party is much more ethnically heterogeneous than its adversary. It is a conglomerate of minorities. In France, the leftist coalition has officially adopted the label, "plural majority". Without the concept of status incongruence, it would be difficult to explain its electoral success.

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Projections of demographic trends tend to suggest that Western societies are becoming increasingly diversified along a non-economic axis, and that the amount of status incongruences which are nourished by ethnic and racial characteristics will also increase.

A mountain of statistics has been collected showing that objective inequality and social consciousness explain only a relatively small part of the variance in the studies on social stratification. What must be added is an interpretation in terms of status congruence-incongruence.

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