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## Convergence and Competition Among the New Turkish Middle Classes

EROL BALKAN AND AHMET ÖNCÜ

Until recently, Turkey was held up by the global media as an exemplary country for its apparently successful reconciliation of Islam with democracy and a market economy. While there was some truth to this notion, one thing that it downplayed is the persistence of the opposition between the laic and Islamic social sectors—or, to borrow a term from the French historian Fernand Braudel, social “sets.” Although there are many such sets in Turkey, based on class, gender, ethnicity, and religion, the two that have always been predominant since the founding of the republic in 1923 are the laic set and the Islamic set. (In the Turkish context, laicism means the subordination of religious affairs to the state, not the separation of the two.)

To put it in everyday language, the laic set comprises individuals who are devoted to the secular principles of the republic and to the legacy of Mustafa Kemal Atatürk, the founder of the state, whom they revere as the incarnation of those principles. The Islamic set appears as the opposite: its members are repulsed by secularism and in varying degrees unsympathetic to the founding father. For many of them, although Atatürk is honored as a national hero, the current president, Recep Tayyip Erdoğan, is the genuine savior of the nation, reviving the glorious legacy of the Ottomans. By overcoming the radical laicism of the Westernizing “elites,” they believe, he has made great strides to-

ward a form of governance more in line with Turkish norms and values, reintroducing Islamic principles in both the political sphere and civil society.

These broad characterizations require further theoretical and conceptual clarifications. Nevertheless, by taking them as our starting point, we can trace the social and cultural paths that these two social groups have taken to improve their own life chances and those of their offspring in an intense competition for upward social mobility throughout Turkey’s modern history.

### CLASHING IDEOLOGIES

Social, cultural, and economic battles between the laic and Islamic sets still divide and define the structure of Turkish society today. They have resurfaced in a more overtly oppositional manner during the past decade. Since the early 2010s, along with the Kurdish question, the laic/Islamic divide has become the main fault line of Turkish politics. This is a clash of two contradictory ideologies over what the true basis of national solidarity and identity should be. The political ideology of the laic set rests primarily on the core idea of the nation-state as the leading “civilizing” agent, contending against allegedly reactionary interpretations of Islam, which are seen as obstacles to the development of a cohesive and prosperous society.

During the period of the Motherland Party (ANAP) governments led by Prime Minister Turgut Özal from 1983 to 1989, the conditions promoting the ideology of the laic set had already been eroded by the rise both of Islamism as an oppositional political movement and of a nascent Islamic capitalist class. The new class employed aggressive strategies geared toward taking over the commanding heights of the economy, especially after Erdoğan’s Justice and Development Party (AKP)

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came to power in 2002. This surprising shift in Turkey's economic, political, and cultural hierarchies has been a consequence of the transition from national developmentalism to neoliberalism.

The hierarchy of social class formation during the era of national developmentalism (1923–80) was two-tiered. At the lower tier was universal literacy and public primary education. Public education at higher levels was intended to create an elite cadre that could direct economic development while promoting national unity. The ideology of national developmentalism, which called for the state to lead the country into a form of regulated market capitalism, reigned until the end of the 1970s. It resulted in the supremacy of the laic set in the social hierarchy.

Under the ANAP governments of the 1980s, however, the state became more of an instrument of private business corporations. Its function was to integrate Turkey's national markets into global finance and trade. Since then, a new middle class has emerged as the locus of the spirit of "free enterprise." Successive governments abandoned the old resistance to private education as contrary to the republican spirit of a unified nation and began to respond to the increasing demand for private options at all levels of the educational system. This tendency gained further momentum under the Islamist AKP governments led by Erdoğan, which generously promoted the rising Islamic capitalist class, known as the "Islamic bourgeoisie," and thereby the new Islamic middle class below it.

The AKP's neoliberal regime created the ideology and conditions for transformative change in Turkey's new upper-middle-class culture, which trickled down to both the laic and Islamic middle-class factions. It opened up new opportunities for middle-class self-expression and identity in the form of the consumption of foreign goods, entertainment, and travel. Upper-middle-class families, especially among the younger generations, led the way in reimagining themselves—encouraged by advertising firms in joint ventures with foreign counterparts—as participants in an emerging global middle class.

The 2000s saw the arrival of novel forms of print, digital, and social media, opening new channels of communication. They brought access to international information sources that offered

new lifestyles for middle-class households eager to shed the ethnonational symbols that had long inculcated the populace with the ideals of republicanism and an identity rooted in post–World War II national developmentalism. This adaptation of a global middle-class culture in its localized variants of the laic and Islamic sorts was not merely something added on to the formation of the middle class in a new political economy and in its globalizing cities. It was always an integral part of the whole process of economic globalization and the neoliberal ideology that gave it legitimacy and meaning.

The Islamic bourgeoisie followed in the footsteps of its laic counterpart by creating a lifestyle modeled after the image of globalized culture. What was taking place in Istanbul and other big Turkish metropolises such as Ankara and Izmir was also unfolding in globalizing cities elsewhere, from Mexico City to Mumbai, subject to national and historical specificities. The "new rich" exerted a disproportionate influence on tastes and habits of leisure and consumption, changing the cityscape.

This influence materialized in the form of luxury housing developments, expensive private schools, upscale shopping centers featuring foreign luxury brands, new restaurants offering international cuisine, and global-

ized clubs and casinos serving not only locals but also foreign tourists.

This was an unprecedented and unexpected change in Turkey: centuries-old social and cultural norms impeding conspicuous consumption have been shaken to their roots. And middle-class families, regardless of their ideological affiliation, have found themselves in a heightened competition for upward social mobility.

## CULTURAL CAPITAL

The common way to think about the middle class in a capitalist society is as what's in between the upper or capitalist class and the working class. Theoretically speaking, classes can be differentiated by their possession of a preponderance of one resource over another. Upper and lower classes each have a preponderance of different economic resources: upper-class families derive their resources primarily from possession of wealth and its direct social transmission, while lower-class families depend on wages and therefore ultimately on the biological reproduction of labor.

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Middle-class social reproduction is neither as direct nor as uncomplicated. From the perspective of the middle class, the solution to the problem of class reproduction can be posed in terms of a preponderance of cultural resources. One of the theorists who have done the most to bridge gaps between theory and empirical inquiry in the study of middle-class reproduction was the French sociologist Pierre Bourdieu. His guiding belief was that lived experience is constitutive of class and cannot be directly “deduced” from an objectivist map of the class structure.

In his essay “The Forms of Capital,” which appeared in English translation in 1986, Bourdieu distinguishes among three forms of capital. The first he labels economic capital, “which is immediately and directly convertible into money and may be institutionalized in the form of property rights.” The second is cultural capital, “which is convertible, on certain conditions, into economic capital and may be institutionalized in the form of educational qualifications.” The third is social capital, defined as “the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition” that “provides each of its members with the backing of the collectively owned capital” as actual and potential credit.

Middle-class families’ preponderance of cultural capital, considering its less tangible and fungible characteristics, poses special problems of transmission from one generation to the next. This problem is especially acute in its institutionalized form of educational qualifications, which are impossible to transmit directly to the next generation. But one way to overcome this embodiment of cultural capital that limits its convertibility into economic capital is through access to educational credentials from prestigious institutions.

One effect of the Turkish state’s monopoly on high school and university entrance exams is strong state control over the institutionalization of cultural capital. In connection with this, one cannot overstate the importance of durable social networks to middle-class families in the practices of everyday life in Turkey. The extent and content of these networks vary considerably even among families with comparable economic and cultural capital, yielding unequal profits from near-equal capital. The deployment of such networks is emblematic of the form that competition takes in middle-class life in Turkey. In particular, it is inte-

gral to the long preparation leading up to the national examinations that set students on a track to elite high schools and universities.

## MOVING UP IN ISTANBUL

In the beginning of this decade, we conducted a survey in Istanbul focusing primarily on the mobility strategies of middle-class families. Our sample included 434 households, of which 278 were from the Islamic middle class and 156 were from the laic middle class. In determining the middle-class status of our respondents, we used many criteria such as monthly salary, other income from financial and nonfinancial assets, occupation, education, and residential location. The respondents were the household heads: the husbands, according to Turkish custom. In order to emphasize the centrality of cultural capital in the reproduction of the new middle class, here we focus only on a small section of our survey, directing attention to educational qualifications.

This can help us see how the respondents utilize their cultural capital to convert the value of their educational credentials into economic capital. Higher educational levels and degrees from prestigious high schools and universities should correlate with employment as professionals and managers in the corporate sector of globalized firms. Those who seek jobs in the corporate sector often aspire to belong to the upper middle class and share the values and lifestyles that have become dominant within the neoliberal landscape.

As expected, the majority of our respondents from both laic and Islamic households had attained a university level of education, though the percentage of respondents with university degrees was higher among laic households. Most of them obtained their degrees from public universities. This reflects the fact that access to foreign and private universities seen as “better” became more widely available after our respondents had already graduated.

One generation ago (the generation of the respondents’ parents), laic middle-class families were remarkably more educated than Islamic middle-class families. Reflecting the supremacy of the laic bourgeoisie during the era of national developmentalism, the percentage of the fathers of laic families who had attained a degree at the university level or above was significantly higher than among their Islamic counterparts. Likewise, reaching upper-middle-class positions through

better educational qualifications was mostly a privilege of the laic set.

Another interesting observation from our survey is the very low percentage of mothers of the older generation, in both factions of the middle class, who attained an education at the university level or above, compared with their spouses. (The ratio was 7 percent among the laic families, compared with only 1 percent among the Islamic ones.) This may show that one generation ago there was a wide gender gap between men and women in terms of access to university education regardless of membership in the laic or Islamic social sector, though the women of the laic set had a better chance of pursuing a university degree than their Islamic counterparts.

The type of high school that an individual graduates from is an important determinant of success in Turkey's highly competitive university entrance exams. Graduates of foreign-language immersion schools and other reputable private high schools are always among the top achievers. Since education in those schools is in one of the Western languages (English, German, or French), graduates have a decided advantage in competing for admission to Turkish universities where one of those languages is often used as a medium of instruction. Some public schools, known as Anatolian high schools (*Anadolu Liseleri*), emulate the curricula of those private schools in order to provide wider access to affordable, high-quality education.

The heads of laic families had higher representation than the Islamic families in the top-achieving foreign-language high schools, Anatolian high schools, and private high schools. But this situation has begun to change. As we emphasized earlier, the institutionalized form of cultural capital is a primary concern among the middle class, because an impressive educational credential is an almost guaranteed ticket to the upper middle class. Not surprisingly, the rising Islamic middle class seems to be well aware of the critical importance of these credentials. They engage in the competitive struggle among middle-class families starting with middle-school exams or even at an earlier level.

Two of our findings may help verify this observation. First, both types of families consider the education of their children one of the most important reasons to save and invest. Second, the per-

centage of the heads of Islamic families who declare the education of their children to be the most important reason exceeds the percentage of those laic household heads who agree—by a significant margin.

Our findings regarding the type of schools that household heads aspire to send their children to provide further support for this important observation. Remarkably, Islamic families' aspirations in general are higher than those of laic families. The percentage of Islamic families that expect their children to attend private schools at the elementary level—the domain of a privileged few—is significantly higher than it is among laic households.

When we focus on preferences for high-school education, most notable is a drop in Islamic families' preference for the so-called Imam Hatip religious schools. This was a startling observation for us because the AKP government had promoted the Imam Hatip schools not only with propaganda but also with generous state funding. Nonetheless, only a small minority of Islamic families anticipate that their children will attend these religious schools.

In the midst of an alleged Islamization of Turkish society in recent years, one would have expected to observe an increase in this school choice among Islamic families. Yet the opposite

occurs, reflecting again the changing attitudes of Islamic families toward the role of education in the competition for upward social mobility. It is worth noting here, though, that these schools are more attractive for working-class Islamic families.

Almost 60 percent of Islamic middle-class families anticipate that their children will attend one of the three types of universities where the primary medium of instruction is English. In this regard, we did not observe any significant difference between the two sets. Our final observation is perhaps the most telling. The majority of Islamic families, just like their laic counterparts, hope to see their children go abroad for graduate studies, mostly to the United States—the trademark of the upper middle class in the global neoliberal environment.

## MIDDLE-CLASS POLARIZATION

Notwithstanding its interests in shaping national unity, Turkish identity, and a malleable civil society, the state also has an interest in managing the middle class for the benefit of a capitalist class

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that dominates finance as well as other sectors of the economy. In the neoliberal era starting in the 1980s, the knowledge and skills of the old middle class were devalued. Corporations became a major source of investment in new private universities, increasing the supply of a new type of middle-class labor that was directed primarily at corporate functions and related services.

The new middle class served as an important symbolic buffer between the capitalist class and the lower middle class, one that appeared more in tune with the interests of a bourgeoisie in the process of becoming a globalized elite. This allowed for the claim that the middle class, meaning the professionals and managers employed in the corporate sector, was “rising.” At the same time, the core middle class (mostly civil servants and other professionals employed in the public sector) experienced deteriorating material conditions and a relative devaluation of its services, which brought it closer to the lower middle class of teachers and clerks than to the upper middle class to which it aspired.

A host of other factors contribute to middle-class polarization. If the strong presence of global trends is an indicator of a globalizing city, then Istanbul, Turkey’s largest metropolis, meets the test. Starting in the early 2000s, a new skyscraper district that became the home of the fledgling Turkish stock market, investment banks, insurance firms, and five-star international business hotels could be seen rising a few miles to the north of the old city center, just over the hills from the Bosphorus and close to the intersection of highways that brought workers over the bridge from the Asian side to merge with north-south traffic on the Western side. Maslak, as this new business center is known, hosts the headquarters of some of the largest Turkish multinational corporations.

Meanwhile, many new symbols of the better life associated with globalization emerged, such as gated communities and glass residential towers, heightening competition among lower-middle-class families for upward social mobility. All these global symbols exerted a powerful attraction, conveying the prestige of positions in large multinational corporations that confer access to a privileged new status. The urge to gain access to this world was as powerful a motivation as the devaluation of the old middle-class positions.

Nowhere was the polarization within the middle class more visible than in the appreciation of residential real-estate values and the geographical separation of housing favored by the new middle class from the residential areas of other middle-class factions. It was a phenomenon that could be seen not only in Istanbul but also in other cities like Ankara and Izmir. This spatial separation took hold during the real estate booms of the 1990s and 2000s, when residential prices on the high end of the market skyrocketed.

## CONSPICUOUS CONSUMPTION

Both laic and Islamic new middle-class families share a preference for living in exclusive housing developments. This is a way of asserting neoliberal values as superior to those of the middle-class factions that were shaped in the era of national developmentalism. The struggle within the middle class from 1990s to the present was all about what it meant to belong to the middle class—materially, morally, and socially. We observe this ideological struggle within both laic and Islamic middle-class families.

In each faction—both laic and Islamic—a new middle class subscribing to neoliberal values and lifestyles emerged and separated itself from the rest. Thus, although they have had different ideological and cultural pasts and orientations, the new middle classes converged into a new status group characterized by social differentiation, spatial separation, growing wealth from appreciating real estate prices, and access to high-salaried, prestigious jobs. Loud claims of a revival of the Ottoman Islamic heritage are often heard in today’s Turkey, yet conspicuous consumption and changing codes of commodity culture in all areas of society have brought a different appearance and sensibility to Istanbul and other cities.

The only variation in our account of upward social mobility in the aftermath of the recent downturn in Turkey’s democracy and economy is a further heightening of the competition among middle-class families for better life chances for themselves and their offspring. Needless to say, Islamic middle-class families, who enthusiastically support “Erdoğanism,” receive many economic and political favors from the AKP government and thereby have gained the advantage in this competition. ■