

How to Survey the Emerging Polish Upper Class – Questions, Dilemmas, Reflections

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Abstract

In light of the significant stratification of Polish middle class, the formation of a group of people representing the 'seed' Polish upper class seems to be obvious. This is a group almost totally unrecognized by economic sciences, though representing a very important segment of customers. The difficulties in the recognition of the group are not only the consequence of the lack of developmental analogies to other market economies (almost 60-yearlong break in functioning of this class in Poland), but also its hermetic nature. The paper will also present the major dilemmas encountered by the authoress at the stage of carrying out her research surveys.

Keywords: social class, Polish upper class, economic behaviors

This paper constitutes an attempt to describe the representatives of the Polish upper class from the perspective of consumer analyses. In contemporary considerations concerning Polish society, the topic of the upper class is mainly touched upon in sociologic discussions. Therefore, this study presents an attempt at an economic focus.

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Stratification changes in Polish society over the last two decades resulted from many factors which were based on economic transformation and complex social aspects. The phenomena of modernization – which enabled the development of a capitalist economy – intermingled with pathological phenomena (like the enfranchisement of the nomenclature and the often unpleasant stories behind the formation of large Polish fortunes). The process of the development of the entrepreneurs' class, proprietors – capitalists, described as the 'returning class' took place.

The topic of this paper is a result of personal observations and academic discussions. An economist, as an observer of economic life, both on the micro- and macroeconomic level, recognizes a number of linkages between social stratification changes and their consequences on the marketplace. One may also perceive that the middle class does not constitute a 'monolith' anymore. It changes and stratifies, something which is reflected, for instance, in the development of diverse markets for consumer goods and services in Poland: a mass market and the luxury and high-status market.

The description of the uppermost level among Polish social classes was taken as a conceptual and investigatory challenge in this study. The first serious problem which one encounters is the lack of continuity in the historical evolution of the traditional (pre-war) Polish upper class. Assuming that 1939 constitutes the border of certain era, after that time the upper class hardly existed for sixty years in Poland. Nowadays, on the other hand, new fortunes, behaviours and habits have arisen due to changes in social and economic life. This allows us to presume that there is a new group appearing in Poland, behaviours of which are characteristic for the traditional upper class. Although it is still difficult to speak about the existence of Polish 'dynasties' and families with the well-established position of traditional upper class, there is, undoubtedly, however, an increasingly hermetic group of people emerging, characterised not only by significant wealth, but for the most part by behaviour styles and represented values, which distinguish them from remaining social groups. This group is categorized by distinct patterns of behaviour and interactions and has its own identity, attitudes, norms and beliefs.

The emerging Polish upper class to some extent eludes the traditional distinction criteria of Western sociology; it is also very reticent when it comes to revealing information about itself. In the research presented in this study the criteria of the description of the upper class in Western understanding were applied, but taking into consideration the circumstances of the formation of Polish upper class, or rather its resurgence after a long break. It is worth noting that the economist is more perceptive

to other forms of behaviour of the representatives of upper class than the sociologist, mainly those connected to consumption processes and market behaviours. The economist is searching for the areas that could be examined, quantified and modelled. The transformations which took place after 1989 led to stratification changes in Polish social structure. Currently, the existence of the middle class as a real driving force of Polish economic successes over the past two decades cannot be denied. But the question remains whether the mere fact of the emergence and slow stratification of the upper class allows us to assume that the middle class will undergo further modifications, creating the foundations for an upper class? In the current scientific discourse one could go further by asking another question: is there already the upper class in Poland, at least in seed nucleo?

The inspiration for such a distribution of the examined population was the division of the upper layer of the middle class from: the highly aspirational ‘credit bourgeoisie’ (who finance consumption not only from the current income, but also from bank loans), the ‘ethos intelligentsia’ and ‘businessocracy’ traditionally strongly rooted in Polish social structure – a group with a high income and accumulated that is characterized by a new attitude to the consumption – less ostentatious and more sophisticated¹.

In sociological studies a certain reserve is to be observed regarding the theory of social classes, with a concurrent emphasis on the interpretation of the present through the lens of communication transformations, the evolution of identity or individual life projects. According to M. Gdula (2012: 188), the appearance of the social classes in sociological analyses refers mostly to the middle class as a category used to dilute class differences and to argue that in modern societies the concept of social classes is no longer applicable².

¹ The following groups were distinguished: credit bourgeoisie – with net income of minimum PLN 5,000 monthly (*per capita*), with a mortgage loan; ethos intelligentsia – with net income of minimum PLN 5,000 monthly (*per capita*), possessing (often inherited) wealth in form of plot, house or flat and profession related to science: scientists, academic teachers (doctor, professor) or to medicine, law, intellectualists and representatives of free professions; and businessocracy – with net income of minimum PLN 20,000 monthly (*per capita*), representatives of the ‘success and hard work generation’ (entrepreneurs, managers, directors, presidents of boards and other professions providing the net income criterion is fulfilled).

² This turn of events was caused by the transition of industrial societies, such as: crisis of welfare state, offshoring of production processes to regions with lower production costs and reduction of the role of trade unions in society. This all led to weakening and decay of the European proletariat, which during almost a century was a real evidence of the legitimacy of using the category of social classes (Gdula 2012).

Nevertheless, in society there is still a division into several categories and the fact of belonging to one of them offers either a more favourable or less favourable position of the entity in the specific community. The differences between those social categories are identified with the social diversity and the classification of individuals in a certain order (resulting mainly from the dissimilar access to social goods) leads to the stratification of society. According to P. Sorokin (2009: 16–17), the majority of approaches to social stratification can be reduced to three main sections, namely: economic, political and professional stratification, wherein these forms are interrelated. ‘Usually people belonging to the upper layers in their category could also be identified in the upper layers of another category and vice versa. People belonging to upper layers in economic terms are also to be noticed in the political or professional layers’ (Ibidem).

Vast majority of the economic and market surveys carried out in Poland at present concerns Polish middle class. The authoress focuses her studies on the evolving upper middle class transforming into the Polish upper class³ At present the economic sciences discourse lacks any studies on the economic aspects of people’s with the highest income functioning. Poland sees an important period of shifts/transitions within the upper middle class strata, whereby the studies on the forming upper class do not exist, either⁴.

It should be noted that there are several important characteristics that differentiate or even distinguish the upper class in the social structure. Firstly, the factor that impedes upper class membership is the lack of good ancestry and family colligations. Being a member of an old family has a practical dimension, after all – e.g. enables one

³ This is a reference to W.L. Warner’s concept, the author identified two factors influencing the population stratification method. He called the first of them the structural conditions: level of wealth, education, occupation performed. All the factors represent foundation for the mutual evaluation of people and determination of people’s membership in a specific social class. W.L. Warner called the next stage the awareness-related conditions that are strictly connected with a system of values, recognized in a specific society. Every position, every profession has a certain level of social prestige attributable to the person performing it. A profession that requires higher qualifications and predispositions, partially depending on the level of education and partially on the inherent personal characteristics of an individual is thought to enjoy higher prestige than a profession anyone can do. Some professions are subjectively valued as more socially useful (doctors, teachers) than other and therefore they are on the top of the list of professions enjoying the highest social appreciation. In this approach there are three classes: the upper, middle and lower class, each of them further divided into the upper and the lower class – cf. W.L. Warner (1949).

⁴ The task taken up is of identifying nature, while the research tool will be developed and performed on larger groups of respondents. Therefore, the study results obtained and presented should be considered as survey and pilot ones.

to bounce back, e.g. through marrying a wealthy person or thanks to the financial help of relatives. Moreover, in each society the upper class is composed of a group of families situated on the top of prestigious hierarchy, bound by exceptionally strong links of friendships, acquaintances and marriages. No other class is so strongly involved in the network of direct relationships, which is characteristic for a primary group, enabling the members to maintain specific lifestyle, confidence of their exceptionality, group identity and solidarity. The promotion channels constitute another important question. While such channels are open to everyone up to middle class, the mechanism of transition to the upper class is immensely complicated. Emphasizing the role of social origin makes the contemporary upper class an original archetype where the present interweaves with the attributes of nobility, inheriting traditions, rituals, etc. This is directly connected with the genealogy of wealth and power (e.g. debutant ball i.e. the ritual of young girls from good families entering the world of adults). The property owned, gathered and passed from generation to generation and economic power mainly performed by the owners and managerial staff (e.g. the concentration of shares in corporation in a close circle of people, recruitment to corporate management boards) and political – participation in governance – effect on the investment creation strategies, interest rates, terms and conditions of loans, etc., participation of their members in cabinets, decision making opportunity and influence on allocation of key offices. The upper class naturally integrates exclusive environments through emphasizing the elite nature of behaviors, customs and consumption. The upper class behaviors include actions representing socialization with elite – preparing children and making them familiar with the use of peculiar language, learning refined manners, way of thinking, behavior, wearing clothes and taste. This supports the elite education system – being the method for assuring the intergeneration continuity of the upper class and instilling and observance of the fair play codes. The sense of exclusiveness, belief in being someone better and group solidarity should be recognized as the characteristic upper class attributes and are based on the long-term training for occupying such positions.

According to J. Scott (1991: 99) the upper class is changing, but it still occupies its high position. The author distinguishes three separate groups forming ‘the interest system’ in management and gaining profits on big business. The senior managerial staff in corporations does not have to own the companies they work for, but they often gather shares in them, which places them closer to the category of ‘industrial entrepreneurs’ or ‘financial capitalists’ mentioned before. As J. Scott noticed, the contemporary financial capitalists (managerial staff of banks, insurance companies, investment funds, etc.) represent the core of contemporary upper class today. It is

increased by persons who have built their fortunes on implementing ICT (Krummel 2008: 5).

The approach to the upper class in the USA is different (Beeghly 2004: 245). This is a social class in which both wealth and power as well as great capitalists are concentrated. The people of the group frequently have immense influence on politics, economic institutions and public opinion (Gilbert, Kahl 1982: 134). The term commonly comprises so-called 'Blue Bloods' i.e. multigenerational inheritance of wealth combined with high social position – e.g. such families as Astor, Roosevelt (Jaher 1983: 260). Significant differences in opinions in the discourse on social classes are found in the question whether the 'nouveau riches' should be included in the upper class. As W.L. Warner, cited earlier, noticed 'the upper class' is formed by the very representatives of American aristocracy. 'The lower upper class' in turn is on the boundary area reserved for 'new money', i.e. the wealth big enough that it exceeds the middle class limits, however this is not a fully formed upper class (from the position of values followed, prestige and esteem). Thus, a specific boundary between the 'well born' and 'business elites' occurs, the latter yet unable to be proud of multigenerational inheritance of wealth and powers – so-called self-made millionaires in prestigious professions. Inheriting privileges is also an opportunity to maintain the status without the necessity to work – well allocated and managed fortunes bring profit of sufficient substance so that the 'upper upper' class representatives may devote themselves to activities unrelated to professional work, e.g. charity.

At the beginning of a discussion on the upper class, it is worth focusing on the attempt to establish a criterion which enables us to distinguish the upper class from other classes. Assuming that in general the upper class is the highest placed class in the social structure, it is important to consider how to extract this class from other classes. Undoubtedly, the members of the upper class have privileged access to economic capital (property, wealth and goods), cultural capital (related to knowledge, skills and quality of education) and social capital, created out of a hermetic network of connections and relationships. The distinguishing feature of upper class is its high prestige and esteem⁵. But still, how is one to precisely define this social group? This question is particularly important in Poland, where the transition of 1989 was preceded by nearly six decades of society with no upper class.

⁵ Although only a tiny percent of the society belongs to upper class (it is 1–3% of the people in a given society), they possess significant economic capital. This class is also very unstable concerning persons forming part of this class because a significant percent of its representatives lose their high positions as a result of the emergence of new actors in the market game.

Many researchers have tried to define (Mills 1963: 473) the upper class, assuming that it is a specific, separate social group, which is characterized by specific patterns of behaviour and interactions, and which has its own identity that forms its values, norms and beliefs.

Particularly with regards to Poland, one must agree with K. Jasiocki (Bombol 2012: 15) that the upper class is an internally incoherent category. Currently it is composed of the representatives of different environments, being successful in different institutional surroundings, all of which, however, are giving them the socio-economic power placing them on the top of the social hierarchy. In Anglo-Saxon countries as a sign of the heterogeneity one may currently observe the division between hereditary owners of 'old' fortunes ('old money') and recently enriched upstarts ('new money'). And considering the sources of capital, one may distinguish the managers of big corporations (fat cats), stock market investors and company owners who achieved great success in the field of new technologies or in the sector of real estate, as well as media celebrities (such as showbusiness stars) and athletes (tennis players, football players etc.).

Moreover, as observed by T. Szlendak⁶, the important definitional distinctive features of the upper class are the 'attributes of affiliation':

- unquestionable high social status (but not necessarily good reputation because sometimes high social position may be a source of envy, jealousy and other negative emotions),
- high intra-category integration ('class for itself', understood as a type of modern caste system),
- connections to ruling elites, including on family level,
- influence and political power, control over legislative functions,
- fondness for the past – anchoring the role of the upper class in the history,
- playing the culture-creating role and the role of stabilizing their social system,
- and the fact that the upper class constitutes a 'non-electable' elite – as opposed to political elites that are subject to the cycle of general elections.

Polish social structure researcher H. Domanski (2002: 142) noted that 'until now, nobody has seriously considered the possibility of the upper class reactivation in the context of the social structure reactivation, contrary to the middle class which is the major subject of the reformatory programs of transition'. K. Jasiocki (Bombol 2012: 17) added that 'the social structure cannot stand empty spaces', which can be

⁶ 'The outlook for the upper class in Poland', T. Szlendak's speech at the conference *Polish upper class economic behavior*, School of Economics, Warsaw, 12.04.2012.

interpreted that although there is no upper class in Poland yet (in the strict sense of Western sociology), in the future its attributes may find its equivalents among other new features of the higher segments of the social structure. As it often happens, the emergence of new social phenomena anticipates their scientific characterization.

M. Gdula and P. Sadura (2008: 8) claim that it is possible to talk about the upper class in Poland, using the criterion of profession. In their research they classified the following professions as belonging to the upper class: CEOs and directors of companies who earn at least quadruple the average salary, freelancers, university professors and lecturers and independent professionals in the cultural sector (for example directors and stage designers). Such content of the upper class corresponds to the division of the upper class into sectors of the dominating class proposed by P. Bourdieu. The owners and managers are the dominant sector, the freelancers are the intermediate sector, and the scientists and artists – the dominated sector.

Undoubtedly, the attempt to define and examine the Polish upper class has many restrictions and seems problematic. The following should be considered as major problems:

- reaching the information sources (legal restrictions, development of market institutions lower than in the Western countries, lack of data in Central Statistical Office, research limited to maximal 6–7% of total population),
- unavailability of respondents for interviewers (difficulties in planning and executing interviews),
- undervaluation of income (proportionally to its extent, reporting problems of Central Statistical Office),
- reluctance to disclose all sources of income and wealth (distribution in time, aggregation, assets valuation, also an objective problem),
- the effect of the accumulation of income and wealth (high qualifications, different sources, multiple jobs, holding high positions in own and other companies, for example BCG wealthy households, 'Forbes' marriages and families)⁷.

Therefore, in the attempt to find my own definition of the Polish upper class, an enumeration of the criteria for definition search was established, with reference to recognized and applied in the upper class research in the Western tradition⁸.

⁷ 'Theoretical and methodological problems of research on Polish Upper Class – Sociological perspective', K. Jasiękie's speech at the conference 'Polish upper class economic behavior', School of Economics, Warsaw, 12.04.2012.

⁸ As part of the grant of the National Science Centre, 39/B/H03/2011/40: *Economic behavior and quality of life of the emerging Polish upper class* – the head of M. Bombol.

The analytical criteria summarized in table 1 (such as sources and ‘historicity’ of building wealth and wealth management, changes in attitudes, values, behaviours and lifestyles, establishing networks and shaping prestige) constitute important issues in the search of the Polish upper class. In most of the cases, the focus was shifted towards economic aspects of functioning of this group, which is a consequence of the author’s scientific interests. Such an approach is the result of the theoretical diagnosis based on social sciences, but performed from the perspective of its applicability within the economic sciences. This is the author’s attempt to adapt and use the tools of sociological research in the design of economic research.

The table 1 presents a number of hypotheses that will be the subject of research and scientific inquiry so that – as a result – the economic and social picture of the Polish upper class will possibly be closer to reality.

Table 1. Proposals of criteria distinguishing the nucleus Polish upper class employed in author’s empirical research in 2012/2013

Criteria	Upper class in the ‘Western’ understanding	Polish upper class
Source of property/wealth	Often inherited over generations	Wealth mainly in the first generation. The alternative notion of ‘upstart’ fortunes
Sources of income	Managing family assets, high managerial positions, participation in governmental and political elites	Acquiring wealth and its skilful multiplication over a cycle of one generation, holding high positions in business and economy, separation (at least in terms of institutional governance) from political elite
Building own fortune	Multigenerational	One-two generational
Skilful multiplication of wealth	Understood as a economically efficient multiplication of resources and assets	In addition to the aspects of effective management, the multiplication of wealth should be regarded as a source of prestige and social standing building
Being successful in business	Social position results from inherited social privileges associated with the general concept of ‘old money’	Actually being successful in business is a prerequisite for entry into the business elite group
Prestige/Esteem	Results from elitism of social status, its uniqueness and the impact on the authorities	At the beginning often pejorative understanding of wealth in Poland as „fraudulent” escape from egalitarianism. Currently, the transparency of doing business enhances the respect for wealthy people, seen as hardworking successful
Power/Authority	Explicit connections with real political power	Avoiding disclosed connections with real political power

Criteria	Upper class in the 'Western' understanding	Polish upper class
Lifestyle attributes	Prestigious, often taking place in hermetic enclaves of upper class ('old money')	Dualism of forms of conduct – on the one hand prestigious – 'celebrity', with attributes of so-called 'new money', on the other hand highly hermetic, in a closed circle and away from publicity in the media
Model creating function in consumption	A class by itself constitutes a model of consumer behaviour	Multipath of the phenomenon of imitation in consumption
Hermetic market offer	Using a range of services and products that are recognizable only by a narrow circle of people, or that have a limited (exclusive) access	Practically marginal in Poland, the use of goods and services intended for the foreign upper class ¹
Social links and relations	Permanent and rooted generational networks (including family affinity). Maintained hermeticity of access to networks	Broad and even 'cutting off' from the past. Internationalisation of the networks and entering into family affiliations with representatives of the aristocracy
Dynamism of creation of upper class	Counted in hundreds or tens of years, often equated with the length of generation of the clan or family	After World War II – the last two decades, with little reinforcements in the period to 1989
Existence of the 'demarcation line' from the middle-upper class	Established criteria for the classification of a particular social group, durability and 'invariability' of these criteria. Transparency of conditions that must be met in order to be in a higher class	Lack of uniform criteria differentiation (eg. separate eligibility rules for HNWI, Affluent and Mass Affluent in Poland and Western Europe). The fluidity of the boundaries between subgroups of the upper class.

Source: own elaboration.

When beginning to formulate research objectives, one can draw a picture of the emerging Polish upper class intuitively. In the description of the upper class, a lot of problems are to be encountered due to the lack of homogenous distinctive criteria for this class. The lack of historical continuity is also problematic – resulting in various aspects of the upper class lifestyles, consumer behaviours, traditions, rituals and even places of residence, education and leisure that have been empowered over a long time. This image is additionally covered with not entirely favourable social perception of

the upper class, often distorted by media or because of envy due to the fact that the fortunes were not gained in a respectable way.

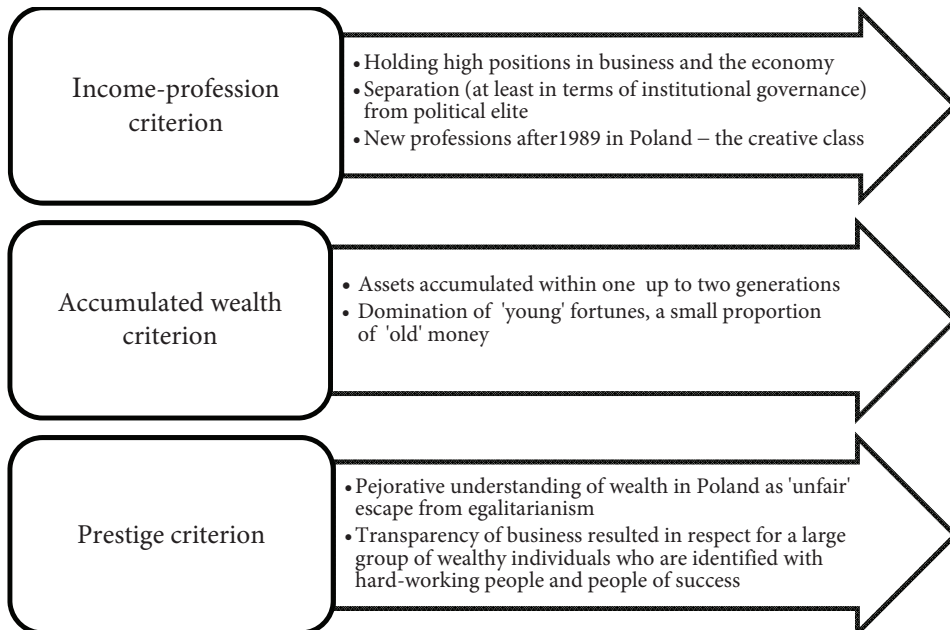
The assumption of the so-called ‘seed’ upper class, being the elite of the middle class tending to create new types of behavior, attitudes, values and lifestyles, is less obligating from the defining point of view. The assumption of such attitude can be most of all explained by the new distribution of income and specific nature of professions, contributing to the formation of Polish fortunes. The characteristic feature of the period of transformations in Poland is exactly the lack of ‘the initial property’ and emerging of new professions, included without limitation in the so-called creative class. The share of so-called ‘old money’ in the Polish version of this group is scarce and the accumulation of wealth continues throughout the duration of one, maximum two, generations. It all takes place in the changing environment of the group perception, from the pejorative understanding of wealth in Poland as ‘dishonest’ escape from social egalitarianism to respect for a large group of the wealthy, identified with hard-working and successful people, running their businesses under transparent principles (cf. fig. 1).

Figure 1. How to define the Polish upper class – economist’s reflections

Income/Professions	Property/Wealth	Prestige
<ul style="list-style-type: none"> • Occupying high positions in business and economy; • Separation (at least in the meaning of institutional power execution) from political elites • ‘New’ professions 	<ul style="list-style-type: none"> • Built throughout one – maximum two generations; • Gaining wealth and expanding it; • ‘Young’ fortunes – scarce share of ‘old’ money. 	<ul style="list-style-type: none"> • Pejorative understanding of wealth in Poland as ‘dishonest’ escape from egalitarianism • Transparency of running business – respect for a large group of the wealthy, identified with hard-working and successful people

Source: the authoress’ own paper.

Figure 2. Author's research criteria applied to the Polish emerging upper class



Source: self elaboration.

The exiting description of the emerging Polish upper class should be regarded as a 'bird's eye' perspective view. There is some knowledge about the image of this social group, however there is a need for further approximations. Therefore, the author developed a concept of her own studies regarding the emerging Polish upper class. These are important because:

- First of all, research on the Polish upper class should be regarded as a challenge from the perspective of scientific curiosity. Procedures similar to 'discovering' new research fields is an interesting task, although sometimes difficult (for example because of a lack of predictable future research directions), sometimes giving illusory results, but very exciting while doing research about what are the typical behaviours of the emerging upper class.
- The area of the values, norms and attitudes of this group seems to be poorly identified; further questions arise: how the values, norms and attitudes are being shaped and what its influence is on Polish society. Is it possible in the stratification diversity to extract the typical values characteristic of the upper class? From the point of view of this study the sphere of the economic behaviour of the upper class remains crucial – whether it actually is the assumed consumption 'elite' and if so,

then how does it create the patterns of economic and consumption behaviour. In terms of the elite, the following question remains to be answered: is the 'wealth' elite also the elite 'ex signi', 'ex auctoritate' or maybe 'ex virtuti'? (Sztumski 2007: 22)⁹.

- Another important issue is a recognition of the typology of consumer behaviour. In an explorative study it is essential to diagnose the rituals, habits, and customs, and – as a consequence – the identification of, for example, market behaviour patterns. Such an identification will enable us to determine whether the emerging Polish upper class is already a pattern-creating consumer segment.
- Moreover, when striving to determine the economic situation of the emerging upper class, it is worth examining the following issue: is it possible (by analysis of economic behaviour) to actually propose a 'demarcation line' between the Polish middle class and the emerging Polish upper class? And what should the criteria be?
- There is also the question of whether (referring to the stratification discussion, but also the discussion regarding the formation of the capitalist economy) one can speak of the 'Polish path' of the development of the upper class?
- According to the author's observation, there is a market need for knowledge about the Polish upper class. In the market analysis, simple analogies to the European counterparts are not sufficient, because there is no historical continuity in the Polish upper class for at least 50 years since the end of World War II. One can intuitively assume that if research were to stop at the current stage of the formation of the upper class, from the market perspective there is a risk of losing a 'niche', but very interesting segment, which would certainly generate significant revenues. Moreover, an analysis of the Polish market of luxury goods shows a picture of clients, who do not always choose the domestic offers, moving their shopping abroad. It is important to learn why that happens. Is it due to insufficient supply or perhaps due to more ordinary reasons: fear of identification, omnipresent media insistence, poor level of service – low competence level and poor discretion sellers?
- As an extension of this topic, it is worthwhile addressing an additional issue: is the stratification of the emerging Polish upper class equivalent to the segmentation of clients? And if so, what criteria should be used?

⁹ Taking into account a variety of criteria to extract elites, we can distinguish elite created 'ex gratia domini', ie on the basis of the inclusion of individuals by giving it a certain dignity; 'ex signi', ie. created by people who inherit titles; 'ex auctoritate', that is made up of people with a specific authority or competence; 'ex Virtue', ie people with prized qualities and virtues and 'ex aliquae causa' that is based on any reasons as special achievements or education.

Due to the broad objectives of the empirical study, a double track research was to be conducted – an explorative quantitative study and a more detailed qualitative study. A total of 90 quantitative interviews were conducted, divided into three groups (30 interviews each). The selection of the sample was justified by the search for the internal diversification, enabling to propose the economic criteria of the distinction of upper class. A following division was implemented:

- Credit bourgeoisie – monthly income minimum PLN 5,000 net, with mortgage loan,
- Ethos intelligentsia – monthly income minimum PLN 5,000 net, with (often inherited) assets (land, house, flat). It was assumed that those are professionals related to science: scientists/academics (PhD, professors), medical doctors, lawyers, artists, intellectuals and related professions,
- Businessocracy – monthly income minimum PLN 20,000 net, mainly entrepreneurs, managers, directors, CEOs and other professions if the income condition is fulfilled.

The research was carried out by direct computer-assisted interviews (CAPI). The sample was selected intentionally – interviews were conducted with people who fulfilled the entrance criteria and agreed to take part in the project. Interviews were carried out by experienced interviewers from 4P Research Mix Company from October 2011 to February 2013¹⁰.

The qualitative research was conducted in the form of individual in-depth interviews (IDI) that were carried out personally by the author of this study. The meetings lasted from 1 to 3 hours and were usually performed in the respondent's workplace. Recruitment for the research was carried using the snowball method (first contacts received from acquaintances and next received from the interviewees). The choice of the method was determined by the specificity of the respondents. Reaching them in a traditional way would be difficult, and sometimes even impossible. All

¹⁰ The study was preceded by an appropriate pilot. The pilot was carried out on a group of 10 respondents with income of more than 5 thousand PLN net. Interviews in pilot were carried out by experienced moderators of 4P Research Mix in July and August 2011. As a pilot project objectives there were: to determine the time required to carry out surveys to find out how it is perceived by the survey respondents, to check whether the questions are understandable, and cafeterias comprehensive collection of tips reformulate questions, identification of sensitive questions, to determine the optimal sequence of questions, gathering first, preliminary responses. At this stage, provided information that the survey is too long (average time: 1 hour 40 minutes). Therefore, it became necessary to shorten. The following changes: some of the questions were removed, a few new questions were added, changes were made to the questions and cafeterias, some of the questions were simplified (simplified cafeteria, joining several questions in one), the order of the questions was changed.

respondents are, on the one hand, people with high income (above PLN 20,000 net monthly), and, on the other hand, people, who have professional and personal relations with the wealthiest Poles¹¹.

With the completion of the quantitative part of the study the first layer of the map of consumption and economic behaviour, as well as attitudes, values and opinions of the upper class was created. Moreover, this was the first approximation to drawing the economic ‘border’ between the middle class and the upper class. In turn, the qualitative research based on the individual interviews with representatives of economic, financial, media, political and cultural elite provides a ‘magnifying glass’ view, allowing us to capture many details and nuances remain elusive in qualitative research. In addition, at this stage, questions were formulated regarding opinions and attempts to define the creation of Polish upper class.

In tables 3 and 4 the detailed fields of both quantitative and qualitative research are indicated:

Table 2. Diagnostic areas of quantitative research among the representatives of the seed upper class – Study 2011/2013

Research field	Range of questions	Interpretation possibilities
Sources of current income	<ul style="list-style-type: none"> • Work in own company • Employee, employed manager • From capital • Family source of income 	<ul style="list-style-type: none"> • Employment status and prestige in the hierarchy of professions in Poland
Accumulated assets	<ul style="list-style-type: none"> • Creating wealth from scratch • Inherited assets • Self-assessment of own wealth (in comparison to the generation of parents/grandparents, to the friends from youth, current friends; co-workers) 	<ul style="list-style-type: none"> • Information on the generational accumulation of capital and wealth. Respect for money.
History of professional career	<ul style="list-style-type: none"> • Education and current work 	<ul style="list-style-type: none"> • Career path and the Polish way of building capitalism

¹¹ In total 12 interviews have been conducted. The interviews were carried out with the representatives of financial, political and media elite from November 2011 to December 2012 – with people holding key positions in the financial sector (CEOs or board members of Central Bank and KDPW – National Depository for Securities), members of the parliament and senators, board members and directors of TV stations, owners of companies, the head of influential magazine, the CEO of the TVN’s Foundation ‘Nie jesteś sam’, representatives of the Polish aristocracy, actors and influential journalists. Additionally, an expert interview was conducted with a journalist who specializes in the observation of Polish financial and social elites.

Research field	Range of questions	Interpretation possibilities
Aspirations	<ul style="list-style-type: none"> • Role models: <ul style="list-style-type: none"> a) in professional environment b) in social life c) in current activities (eg. charity, social) 	Diagnosis of the values and role models
	<ul style="list-style-type: none"> • Sources of inspiration concerning: <ul style="list-style-type: none"> a) Appearance – figure, image b) Clothes c) Equipment and decoration at home d) Sports, hobbies e) Culture – areas of particular preferences f) Knowledge, self-improvement, building professional status g) Education of children h) Venues and style of relaxation i) Frequently visited places j) Place of residence k) Place to live in old age • Personal choice or consumption necessity: <ul style="list-style-type: none"> a) Importance of codes (for example brands, specific producers, shopping venues, so-called showy consumption) b) Focus on nonconformist consumer choices, in accordance with own preferences c) Impact of the power of tradition d) Impact of the power of social position e) Following trends, complying with fashion f) Consumption obviousness – world of consumption in already existing and so obvious that the choices are made automatically 	Recognition of values, consumer attitudes and lifestyles

Research field	Range of questions	Interpretation possibilities
Self-definition	Building consumer narrative <ul style="list-style-type: none"> • consumptive ‘me’ – consumption methods of self-expression ‘here and now’, through: <ol style="list-style-type: none"> a) products b) services c) technological innovations d) gadgets e) pleasure f) places • social ‘me’ <ol style="list-style-type: none"> a) social activities b) actions for other people c) me and politics • ideal ‘me’ <ol style="list-style-type: none"> a) appearance b) behaviour: professional, family, social, charity c) surrounding products 	Narrative and personal determinants of consumer behaviour
Money in life	<ul style="list-style-type: none"> • Attitude towards money • Developing relation/respect in own children • Using money – pleasure, investment 	Attitude towards the world of money/tangibles
The world of the upper class	<ul style="list-style-type: none"> • Sense of belonging to privileged class • Social/consumption alienation or integration • Typical brands • Typical shopping • Typical consumption pleasures • Using consumer advisory 	The specificity of consumer behaviour confronted with market supply addressed to the emerging segment of upper class

Source: self elaboration.

Table 4. Diagnostic areas of qualitative research among the representatives of the seed upper class – Study 2011/2013

Research field	Range of questions	Interpretation possibilities
History of life and professional career	<ul style="list-style-type: none"> • Family origin, capital ‘for life’ – education, tradition, patterns, values • Career ladder • Evaluation of professional position 	The hierarchy of values and life choices. Career progression in times of economic change. The prestige of professional status
Attitude towards money and possessing	<ul style="list-style-type: none"> • Self-assessment of own wealth • Impact of money on life • Identification personality features favouring financial success 	Diagnosis of materialist and post-materialist values. Assessment of the level and quality of life

Research field	Range of questions	Interpretation possibilities
Shopping, branded products, self appearance consumer narratives	<ul style="list-style-type: none"> • Fashion and brands inspiration • Role of brand in shopping decisions • Importance of brands and their quality in image creation • Attitude towards shopping 	Consumer attitudes and shopping behaviour. Attitude to consumerism
Lifestyle	<ul style="list-style-type: none"> • Daily time schedule in weekdays and on the weekend • Leisure time • Media • Hobbies and interests • Holidays and relax 	Diagnosis and typology of leisure behaviour. Recognition of lifestyles of the emerging upper class
Interpersonal relations	<ul style="list-style-type: none"> • Family • Friends • Professional environment • Role models • Social activities (individual and due to professional reasons) • Charity 	Diagnosis of selected elements of social capital of the emerging upper class
The world of upper class	<ul style="list-style-type: none"> • Definition of upper class • Perception of upper class • Sense of belonging to privileged class • Typical behaviours of upper class 	The search for the definition of the emerging upper class

Source: self elaboration.

Moving to the research findings, it should be noted that the majority of respondents are people with higher education, with Masters degrees. In the segment 'ethos intelligentsia' there were proportionally more people with PhDs, the Polish postdoctoral title and professors. Outside of the 'ethos intelligentsia' no efforts were observed to gain further academic degrees and titles. In most cases the respondents are satisfied with a Masters. More often, they opt for the second faculty or postgraduate studies. In such context one may assume that constant development and education are the foundations of success and high income. Most often the fields of studies of the respondents were law and management, followed by economics and medicine. Among people who finished higher education, 25% finished two fields of study¹². When it comes to the job profile in the examined group, the majority

¹² The most popular colleges and universities, where the respondents studied are: the University of Warsaw, Gdansk University, Jagiellonian University, University of Mining-Metallurgy in Krakow, Wroclaw Medical University and the Warsaw School of Economics. So Polish, state universities dominated – generally regarded as the Best, with traditions. Five of the respondents were educated in foreign universities. But it was the next stage of education, undertaken only after completion of studies

were businessmen running their own companies, lawyers, doctors and academics. It proves that choosing those professions results in a high income.

Additional information on career fields was obtained in the course of the qualitative interviews (IDI). The vast majority of respondents completed higher education. They had always had a desired field of study, although sometimes it was chosen unintentionally, for example one did not manage to get to the field he always wanted. In some cases the choice of field of studies was determined by family tradition (the profession of parents or grandparents). In the course of studies, the respondents achieved good results, and at the same time they often combined studying with a professional career; already during their studies they were earning money and gaining professional experience.

The two-way nature of the study has been assumed – the explorative – quantitative part, performed on representatives of groups selected by experts: credit bourgeoisie, ethos intelligentsia and business-crazy, observing the proportions of share in a given population. Thanks to accomplishment of this part of the study, we may talk about the first ‘stratum’ of the map of consumption and economic behaviors as well as attitudes and opinions of seed Polish upper class. Moreover, this is the first approximation to set the ‘economic’ boundary between the upper and middle class. The qualitative study, in turn, performed as individual interviews with representatives of economic, financial, medial, political and cultural elites, is ‘the magnifying glass optics’ enabling to grasp a lot of details and nuances, escaping the empirical examination of the quantitative studies. Furthermore, the questions concerning the opinion and attempts to define the Polish upper class have been formulated at this stage.

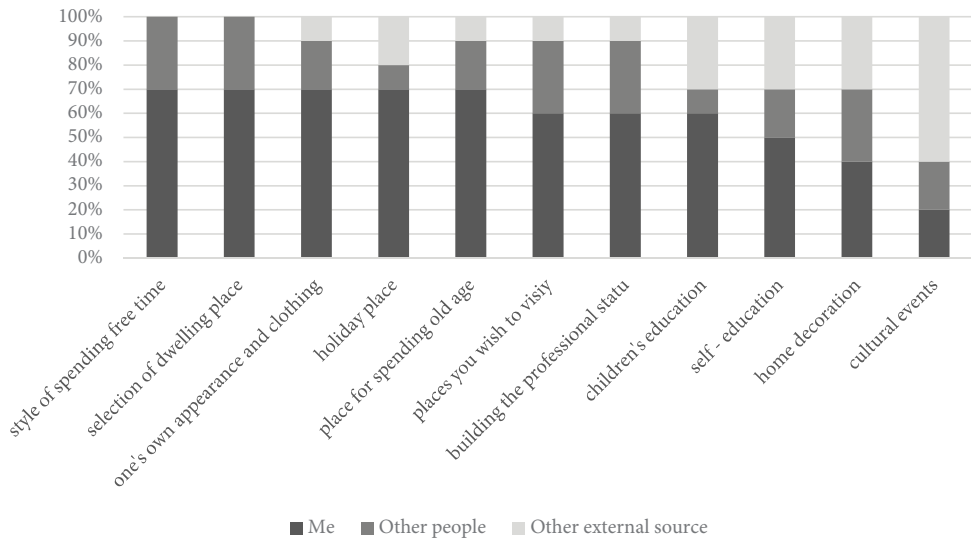
Further, there were attempts to define where the respondents get the inspirations related to various aspects of their lives. The target set by the authoress was to diagnose whether the people from the upper income groups follow the opinions of others or rather rely on their own knowledge and experience. The vast majority of responses concerning spending free time, dwelling place, appearance and ways of dressing as well as holiday spots show that the respondents follow their own opinion. The opinions of others become more meaningful in case of household furnishing and decoration, building one’s own professional status and cultural events. The most difficult was the answer to the question of sources of inspiration concerning places

at Polish universities. Every fourth respondent completed post-graduate studies. Relatively more of these people are among the businessocracy and less among the credit bourgeoisie. Of those who have completed post-graduate studies, six were educated at the University of Warsaw and three at foreign universities.

to spend old age – this question seems to be too abstract in the respondents' opinion (cf. fig. 3).

During the study the respondents were asked about their attitude towards shopping. Presumably shopping is not a 'remedy' for bad moods, nor is it particularly important in the respondents' lives. It is simply an element of their lives embedded in the basic economic behavior. This has been proven by the neutral responses to such questions as 'I like doing shopping', 'I try to buy product at promotion prices', 'I happen to buy products I do not use afterwards' or 'I like going to the shops, even though I do not intend to buy anything'.

Figure 3. Sources of inspiration for the emerging Polish upper class according to a survey research



Source: the authoress' own paper based on 4P Research Mix in July and August, 2013.

We may learn a little more about the respondents from their declarations concerning the brands they buy and use (H&M, Mexx, Esprit, Zara) there are also luxurious brands – such as Lacosta or Simple. Footwear brands include popular brand categories from the so-called middle shelf: Aldo, Bata, Ecco).

More luxurious brands refer to the perfumes used – Armani, Burberry, Calvin Klein, Hugo Boss, Dolce Gabana and cosmetics – Chanel, Clinic, Lancome, Ginenchy. It is worth emphasizing that the respondents use so-called pharmacy brands – Avene, Nuxe, Vichy, at more than average prices and quality in their product category.

As far as the shopping venues are concerned, it is noticeable that in addition to shopping malls and delicatessen (obvious for this class of consumers' wealth) discount stores appear.

To summarize the accomplished recognition of the emerging Polish upper class, it should be noted that:

- In the field of Polish economic studies, the present study is of pioneer nature. The recognition that appears most frequently are the procedures of segmentation of the wealthiest Polish consumers, however their basic disadvantage is the fragmentary information, most frequently related to specific consumption goods and markets.
- The very first attempts to select the sample group for survey indicate the fact that the upper class definition should be adapted to the Polish conditions, bearing in mind the fact that it has not been formed in the same way as in the mature market economy countries. It should be emphasized that the almost 60-year long lack of continuity of this social stratum development not only results in the sphere of the amount of the properties gathered and inherited, but also in the field of attitudes and values.
- The first question arising is the one whether the 'seed' upper class really exists. Undoubtedly, there is a sphere of richness and wealth, proven by the list of the richest Poles published by the Polish edition of the Forbes magazine. Currently the individual interviews performed by the authoress concerning the net income above PLN 20,000 *per capita*¹³ indicate the perception of the upper class representatives not only as wealthy people, but also ones having 'class' – understood as a set of good manners, modesty, gentlemanliness and respect for others.
- The group of representatives of 'the boundary area' between the upper middle class strata (still with high consumptive aspirations) and the lower-upper class ('business-crazy') selected for the survey research purposes, reflects only part of the economic behaviors only. A totally different picture is obtained in the said individual interviews with people gaining above PLN 20 thousand net income *per capita*, disclosing the lack of ostentatious consumption and ethnocentric attitudes (e.g. selecting Polish clothing brands, using the services of Polish designers, etc.)

¹³ Data from the grant of the National Science Centre: 'Economic behavior and quality of life of the emerging Polish upper class'.

They often use the services of a living in housekeeper and outsource shopping (e.g. the stylists supply their packages to their homes for trial and possible acceptance). Generally, 'possessing', 'wealth' are not the essence of their lives and functioning, although it is noticeable that hard work, reliability and setting further targets for themselves is part of the agenda of the respondents.

- The difficulties in recognition of this group result from the researchers' restricted access to it, they basically require prior recommendations. Moreover, the representatives of the class concerned present scarce interest in sharing the knowledge on themselves, which probably is aimed at the protection of this group hermetic nature – this is a standard in relation to the typical upper class representatives in the countries such class has continuously been developing throughout generations. The research required prior recommendations. The consent for interview was obtained more easily when the respondent was informed on the scientific purpose of the research – therefore, the interviews were carried out by a team – the authoress and a survey agency representative.
- The authoress' observations indicate that the wealth criterion in Poland affects the upper class perception. So-called celebrities and 'nouveau riches' who are classified within the so-called 'new money' in the American stratification. This specific classification 'washout' not entirely reflects the real upper class behaviors.

It seems that the research commenced just show 'the top of an iceberg', of which the most interesting fragments remain in the sphere of mystery, to the same extent to sociologists, economist and market practitioners. Undoubtedly, this is a hard 'surveyable' group, which does not mean it is generally inaccessible. The major difficulty is the impossibility to transfer the research procedures applied to the middle class surveys, i.e. the seed upper class representatives are hard to be materially induced to participate in the surveys, they have scarce time amounts to be devoted to an interview. In a closer contact they are eager to share their opinions and divagations, describe attitudes and behaviors. This is a group whose detailed description shall enable the diagnosis of subsequent pattern creating behaviors that will become the object to be followed in the near future, particularly within the Polish middle class.

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