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Social Identity and Social Exclusivity: South Africa's Middle-Class Strata in a Perpetual Struggle for Integration

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Abstract

The object of this article is to proffer a critical contribution into discourses about social exclusion, which has a bearing on socio-economic development, but with specific focus on the concept of social exclusivity from a perspective of class struggle and social identity. At the center of attention, the article attempts to advance an insightful elucidation of the realities besieging South Africa's segment of the previously disadvantaged groups, the so-called 'educated middle-class'. The middle-class often manifest with delusional thoughts, who owing to lack of ideological intelligibility, find themselves at odds with harsh capitalist realities, and are instead fighting to be integrated into a highly globalized, but not native friendly system which is an imperial heritage largely characterised by socio-economic deprivations and arrangements that entrench the continued material disadvantage of the majority, the lumpen-proletariat, the 'less-educated lower-class'. It is asserted that social exclusivity, which manifest through forced social integration and preservation of exclusive social status, contributes immensely to South Africa's social instabilities, especially because it accepts that inequalities and socio-economic deprivations must be accepted as part and parcel of choices in human development. Further, that although this phenomenon appear to be modern in form, it actually originates from the past, and inherently perpetuates social arrangements established prior and during apartheid.

Keywords: *social identity, social transformation, human well-being, inequalities.*

Introduction

Studies focusing on human capabilities development, socio-economic development and human wellbeing issues should capture the concept of social exclusion as being synonymous to social injustice, social ill, socio-economic deprivation, inequality, poverty and under-development. Beall (2002) have advanced two critical points about social exclusion, describing it as an unfortunate but inevitable consequence of global economic re-alignment which continuously drifts majority of workers from the labour protective ambits, and that social exclusion is simply a re-labeling of poverty to distract attention from the pervasive inequalities created by the broader capitalist economic systems. This article draws from Beall (2002), but seeks to emphasise that the term social exclusion has high relevance and implications on studies concerning poverty, deprivation, human wellbeing and people's social and economic situations (Sen, 2000). In the main, social exclusivity as a concept is capable of demonstrating how poor people suffer (de Haan, 1998), and how South Africa's middle class by extension, experience multiple material disadvantages in areas such as labour relations and income disproportions. Social exclusion also occupies a fundamental position in determining which citizens are meaningful role players in governance systems and institutions, while also being capable of demonstrating which segments of society are excluded from participating in either governance and political decision-making processes, the labour market activities and economics in general (Barry, 1998). All these aspects impact on the livelihood and wellbeing of all citizens. Social exclusion has a significant relationship with social structure theory, which is considered to be amongst central concepts in sociological analysis (Cook & Whitmeyer, 1992), and thus, occupy a critical position in determining how social groups identify themselves and perceive their entitlements in society. At the center of attention in this article is the concept of social exclusivity, which of course essentially emanates from social exclusion and social structure concepts. The social exclusivity phenomenon has conspicuously characterized South Africa for the better part of its human history, and it still continues to flourish even twenty-six years into a so-called non-racial democratic

dispensation, what I paradoxically and constantly venture to describe as a psychologically simulated social transformative democratic dispensation. Such social exclusivity has, over the years, been experienced mainly along social, racial, political and economic lines owing to extreme disparities of wealth between the rich and the poor.

With an unquestionable history of widespread socio-economic deprivations, it is trite that South Africa's society would have hoped to realize a total destruction of egocentric-selves, biased groupings and class struggles, on the understanding that human beings are homogenous creatures that ought to aspire only the good and general social welfare of everyone. But it is clear that the post-1994 dispensation encountered a soft, yet complex social inhibiting challenge, which is that the active citizens, those that ought to advance restoration of social peace, social cohesion and transformation in general, are supposedly caught up in a permanent struggle for integration into a system which disadvantaged them in the first place. Thus, there is an incessant need to unravel the role played by deprivation, poverty and class strata when it comes to determining the character of a social group, particularly in respect to its ability to determine social identity, socio-economic success and the broader societal social cohesion.

Problematization Statement

Social inequalities, economic deprivations and material disadvantages still characterize South Africa's prime challenges when it comes to matters of social development and human wellbeing. These phenomena were deeply entrenched under apartheid, yet they remain of widespread prevalence twenty-six years into democratic dispensation. For the better part of human history, social struggles have fundamentally been predicated on desperate yearnings for better social welfare and human wellbeing. According to Silver (1994), this resulted in capitalist democracies having to undergo rigorous processes of social and economic restructuring, in order to accommodate people's social needs, based on both individual and communal needs. This is particularly relevant to South Africa, whose experience typifies a process where majority of the previously disadvantaged oppressed are constantly engaged in an endless struggle for economic integration. It is worth noting that while engaging in a struggle to depose an undemocratic regime largely occurs owing to disregard of fundamental human rights, the primary factor is non-fulfillment of people's basic needs, which is essentially concerned with ensuring that citizens have access to basic services needed to sustain a better life. This entails that during difficult times, citizens would ordinarily have mutual objectives. Nevertheless, the post-liberation realities may presuppose that since the beginning of time, every phenomenon that became known as change or transformation inherently gets complemented by internal challenges, with the fight for integration and social exclusivity becoming rife soon after transition into democratic dispensation.

Beall (2002) has also demonstrated that social exclusion is deeply rooted in social, economic and political experiences. Accordingly, those that feel excluded begin to grumble, largely because they have a deep seated feeling that they have the necessary capacity to successfully get integrated into the mainstream economics owing to their economic and social status. This category of citizens are more likely to strive towards being integrated by all means, even if it means at the expense of the struggle for disintegration of class domination. Consequently, this culminates in the concept of social exclusivity, which receives added impetus from prevailing spiraling inequalities in economic realities. What this phenomenon create is a process where the middle-class strata is inherently engaged in a permanent struggle to sustain a two-tier society, where social status is overwhelmingly viewed as a determinant of happiness, success and human wellbeing, (often widely understood among the urbanites) whereas material disadvantage is perceived as being synonymous with the underprivileged proletariat (mostly understood to be referring to rural inhabitants). It is worth noting that South Africa has a repugnant history of social and economic exclusion under which people's social status and security were determined along racial lines. Further, distribution of resources was on unequal basis, which fundamentally limited development on majority of citizens.

Rationale and Research Approach

This article is a product of the author's deep-seated feeling that the middle-class and their human nature is continuously engulfed in self-inflicted sufferings. The article is set out to stress, partly in accordance with Amartya Sen's thesis (1995), that the choice of reasoning, and its intrinsic loss, provides the middle-class strata with an overwhelming opportunity to deal with and eliminate intolerable deprivations in society. Further that owing to their fragile social identification trends in society, the middle-class strata faces a high risk of either remaining without any sense of belonging, because of supposed self-isolation from the poor, while equally not being part of those that own the means of production. This epitomizes a stratified class-struggle under which lack of clear social identity contributes to diminishing prospects of unity and reconciliation, social peace and stability, and social

justice and human development. Whereas several studies that dealt with social exclusion approached it with specific focus on the premise of poverty or disadvantage, this article uses this concept to describe a phenomenon under which a certain segment of society strives to join the class of those that identify themselves as special beings, those with supposed better access to social services and standard of living, but who according to (Percy-Smith, 2000) are also adversely affected by rapid changes and challenges in economic environments resulting from globalization, corporate restructuring and the unstable labour market.

This article adopts a theory-based analytical method, relying on the social identity perspectives as tools of analysis. The article also employed semi-structured social interactions, that is, unstructured distant observations and wholly informal conversations with a selective middle-class strata with the primary purpose of establishing their perceptions with regards to social arrangements characterizing South Africa's social relations, social identity and human development. At the center of attention, this article addresses the research question; what is the context of social exclusivity and what ought to be understood as its social determinants, especially in the context of the post-apartheid social transformation targets.

Theoretical Framework

With the growing trends of inequalities and varied socio-economic deprivations worsening (Maluleke, 2019; Francis et al, 2020; Polus, 2021), South Africa is constantly being exposed to major risks of social eruptions and social instability. Somewhat, it appears that the noted inequalities also have a theoretical bearing on perceptions held by the middle class strata, and this is particularly relevant when it comes to the meaning of socio-economic progress in a capitalistic South Africa. Of course, discourses on inequalities would be incomplete if they disregard the historic hegemonic apartheid government systems, fundamentally because such systems created and reproduced deep-seated social inequalities in communities (Ndimande, 2016), thereby creating an enormous gap between the proletariat and the owners of the means of production. It is also important to note that this further strengthened stubborn challenges derailing the foundational objectives of class struggle as described by Marx and Angel. It is for this reason that Humphries (1977) seem to argue that the categorization phenomenon is spearheaded by a capitalist ideology, somewhat creating bourgeois institutions that deceive the middle class into believing that they are part of the system, while undermining the noble ideals of class cohesion. Hence, this article describes this tendency as a struggle for integration, which Marx conceptualised as a deliberate capitalistic construction that should be held responsible for reproducing the monetary exploitative relations between the working middle class and capitalists owners of the means of production (Thompson, 1978). To a large extent, perspectives from this history contain useful observations that may shape our understanding of the ongoing social identity complexities among the middle class, when read in closer scrutiny regarding how the middle class associate with the ever-disadvantaged poor in rural areas. Therefore, it is important for those engaged in both sociological and anthropological scholarship to continuously develop or outline the theoretical basis upon which the emergence of social exclusivity is premised. This is also significant in demystifying the extent to which social identity and social structure theories could assist in explaining the existing gaps amongst the middle class, and towards influencing formulation of social policy impacting on their socio-economic wellbeing and society's developmental objectives.

In this article, I relied on the social identity perspective to describe the theoretical position, which I believe, properly captures the realities of the struggle for integration and social identity amongst South Africa's middle class. The social identity perspective is appropriately suited because it has also been found to assist in explaining how educational achievement gap evolves (Matschke et al, 2022) and how the transitions and formations of new social identities occur. I assert that South Africa experiences pervasive social identity struggles and trends that are particularly visible through the middle-class' preferences concerning access to services such as education and health care. This is particularly applicable in the context of private-public service. At the centre of attention, I rely on these perspectives to demonstrate that there is an inherent relationship between intergroup relations and constant economic stratification, which Barry (1998) describes as being responsible for illustrating that the middle-class is significantly no distinguishable from one another. This is arguably because their struggles are generally perceived in the context of embedded self-categorization cultures. It has been found that resulting from such a self-categorization process, individuals develop positive attachments to the in-group of interest and intragroup self-esteem (Laffan, 2021). It is at this stage of self-categorization that social identity theory practicably emerges. As a meta-theory of inter-group relations and the evaluative process of self (Raskovic, 2021), social identity theory identifies and demonstrates how a group of individuals who accordingly possess common knowledge begin to assert that they belong to a certain social category or group (Stets and Burke, 2000), and whom as a collective, hold a common social classification often under a misguided illusion that they pursue a common goal. Hence, the social identity theory enables and equips researchers with a richer approach to a variegated ascription and

identification of social categories (Porter, 2021), which can assist in understanding South Africa's permanent class struggle. The social identity theory is also suited to be deployed as an effective framework through which to explain individual behaviour (Ahmad et al, 2022) and perceptions about a sense of belonging. Once individuals internalize group membership based on the concept of self, the effect is that this will influence their attitude and behaviour towards other persons (Sewell et al, 2022).

Towards creating an improved understanding with regard struggles of South Africa's middle class, it is crucial to explore some theoretical insights and norms regarding class cohesion, class domination and class' socio-economic development. According to Hogg and Reid (2006), the social identity perspective, which captures both the social identify theory and self-categorization theory, provides some cognitive clarity on the actual propellers of South Africa's middle class and their perpetual struggle for integration into the mainstream economic landscape. In terms of the social identity theory, factors that create intergroup competition trends that define social status and egoistic self-enhancement are crucial when evaluated against the general developmental needs of the proletariat. In other words, the middle-class strives to have a sense of belonging to a group they perceive as possessing much better status in society. Once the middle class perceive themselves as being part of the economically useful group in society, they devote every effort towards identifying themselves as part of important economic role players and wholly devote allegiance to the capitalist establishment, because they feel a strong attraction to the group as a whole (Stets and Burke, 2000). As a result, their attitude tend to develop cultures that create a similar group and intergroup behaviour in a yet unfavourable capitalist setting. On the other hand, self-categorization theory establishes that a social cognitive process will propel people to form groups, construe themselves according to trends in that group, and thus resulting in common group behaviour that define social identity and influence in that category of intergroup relations. Hence, Hogg and Reid (2006) believe that these categories become prototypes that characterise the norm of isolating from the collective struggles of the proletariat. It is for this reason that I dare say the perpetual struggle for integration by the middle-class represents a departure from the collective class struggle as defined by Marx and Engels. This is fundamental because South Africa's middle class subconsciously connive to entrench prejudice, discrimination and several other conditions that foster class domination and various types of intergroup behaviour at the expense of collective class struggle, wholly premised on fulfilling the human development objectives.

When broadly interpreted, the social identity perspective produces a much clearer explanation in terms how the middle class are intrinsically central to the reproduction of the capitalistic culture of inter-group self-importance. It shows that social class is the basis of classification systems in society in which those with privileged access to resources and broader capitalists' establishments foster class producing social fields of lifestyles and distinction. In terms of the Marxist theory, this emanates from the persistent contradictory relations between capital and labour in the realm of material production and societal configuration (Joppke, 1986). In the end, the co-opting of the middle class and their misconceived comfort result in the occurrence of inter-group biases that further alienate the lower class proletariat in society, giving rise to the need to protect economic interests of dominant inter-groupings (Brown, 2000).

Social Exclusivity as a Misconceived Social Progress

While it is acknowledged that the post-1994 democratic dispensation brought about necessary changes to South Africa's economic landscape, it would utterly be ignorant not to state that there remains critical challenges impeding society's realisation of social justice, economic justice, human wellbeing and social peace. Towards redressing the imbalances of the past, there has been some consensus that the removal of apartheid restrictions and the implementation of a series of government policy initiatives such as affirmative action and Black Economic Empowerment have resulted in a huge proportion of the population being fitted into the middle class strata (Mattes, 2015). Whether such an integration of the previously poor or economically disadvantaged homelands dwellers has resulted in the intended patriotic bourgeoisie segment to assist in spearheading the broader process of development remains a contentious matter for debate. This is particularly because what is apparent to date is that South Africa is a society of the ultra-rich and the ultra-poor, and quite conceivably, the middle class is constantly battling for integration, notably seeking high-order opulent needs that further alienate the lower class common proletariat. By fitting in the thriving capitalist setting, is the middle class entrenching social exclusivity and pervasive poverty or is their special inclusion a hopeful symbol of social progress?

Amartya Sen (2000) has held that social exclusion has conceptual connections with the phenomena of poverty and deprivation, and should thus be understood as a concept which captures our attention either to lack or the absence of certain needs that a person values having, or the ability of others to exclude those who are underprivileged. For instance, lack of income and or access to basic amenities of life result in social exclusion that renders one's life a subject of poverty and deprivation. In contrast, an attempt to lead a specially flamboyant

lifestyle result in feudal social exclusivity, and this is what characterizes the middle class' struggle for integration. Hence, the social identity perspectives explains how the middle class strata as a group formulate similar perceptions in terms of having sense of belonging to a certain social category or group and collectively internalize their social classification as the privileged class, while simply entrenching the classic neo-liberal bourgeoisies

The Middle Class, Social Change and Capabilities Expansion

It is indisputable that South Africa's socio-political changes experienced in the nineteen-nineties culminated in acceptable legal normative frameworks that enabled democracy and rights-based approaches to socio-economic and human development to thrive. However, a similar sentiment cannot be restated regarding the erstwhile resolve to eliminate class domination, particularly because deep social and economic disparities still characterise South Africa's social dynamics, with most people languishing on the fringes of the formal employment sector (Lombard, 2008), many suffering from the worsening unemployment crisis (Bowmaker and Herrington, 2020; StatsSA, 2021), and being sidetracked from major economic activities that safeguards enhancement of human capabilities. It is important to note that in emerging democracies such as South Africa, the middle class strata becomes the advancers of two critical paradigms, to wit; either as epitomes of optimism, success and capabilities development, or they become epitomes of post-liberal hopelessness, at least from an ideological perspective as it relates to their understanding of social change, class struggle and social integration. This view takes into account the fact that the post-1994 policy and legislative imperatives do very little to meaningfully alter the social arrangements established under apartheid. Hence, most of these policies and legislative reforms fundamentally reproduced intense liberalism that fostered the creation of bourgeois social relations in the specific social formations (Legassick, 1976) thereby propelling the middle class into an undefined phase of seeking validation by embracing the neo-liberal establishment and practices that necessitated the struggle against apartheid. Others have argued that this was caused by the neo-liberal macro-economic policies that resulted in increased unemployment and deepening inequalities (Chopra and Sanders, 2004). This article argues that the noted permanent struggle for integration is also attributable to the absence of a clear philosophical positioning of the post-1994 dispensation.

There is an inescapable anecdotal evidence illustrating that the middle class strata plays an instrumental function in terms of giving meaning and hope to the greater segment of the common proletariat in society. Hence, South Africa's transition from its repugnant history of discriminatory laws can best be understood when depicted through social change that encompasses the living conditions of the middle class. It is now trite that the erstwhile apartheid establishment legislated racial segregation that fostered extreme disparities of wealth between the rich and the poor. Those who were privileged to access better paying jobs such as teachers, nurses and police officers were at least assured of achieving slightly improved living conditions, which qualified them to be captured as the middle class in accordance with Marx context. In many ways, the apartheid policies and the laws also impacted on aspects such as social identity amongst citizens, spatial planning for rural and urban development, access to health care, access to education and social security, thereby entrenching drastic societal arrangements under which those who were banished to the 'homelands' or 'bantustans' became epitomes of underdevelopment and primitiveness. It is for this reason that the post-1994 dispensation inherited an unfortunate ideological misfortune in that class domination which isolated the middle class strata became more entrenched and mirrored the realities inherited from the past. According to Smith (2001), the legislated insensitive laws and policies were largely an attempt to constrain urbanization, thereby putting strict control measures on movement of people from the homelands into the cities. As majority of people attempted to move into the cities in search of better opportunities, spontaneous informal shack settlements started expanding, and this resulted in an unintended complication of some limited racial integration, which became unavoidable owing to labour needs and access to urban services. The importance of this brief historical reflection is premised on demonstrating that the continued desire amongst the middle class strata to have access to distinguished social welfare services, better jobs and salaries partly has its roots in the erstwhile apartheid and imperial structures of government. In other words, contrasting life in the homelands and life in the cities remains an important variable, which seem to determine the extent to which a persons' social and economic development are shaped. Therefore, the middle class' struggle for integration is an invariable social change struggle which is informed by the desire to redress the historical dismal slum settlements (Legassick, 1976) that characterised the early township development and the homelands set-up. It is for this reason that one cannot understate the effect that the erstwhile racial dynamics had in shaping the present social change processes, especially in the context of both private and state funded initiatives to enhance human capabilities and the ability for citizens pursue and value what they desire in the lives.

Conclusion

This article set out to explain a context of social exclusivity, and the relationship between the concept of social exclusion and South Africa's middle class strata. While integration is appreciated as a greater variable in South Africa's continuing broader social change framework, it is also seen as a propeller of the concept of social exclusivity, which ironically reproduces unintended neo-liberal trends that initially created petty bourgeois social relations in various sectors of society. Through social identity perspectives, it is discerned that the desire to be distinct, successful and achieve enhanced human capabilities appear to be amongst the foundational factors that propel the middle class strata onto a fixation of integration into the post-1994 neo-liberal systems that do nothing other than reproducing and entrenching the disparities of wealth between the rich and the poor. In a South African context, it appears that those with notable historical traces of homelands deprivations perceive integration into the capitalist establishment as a symbol of success that distinguishes them from the broader common proletariat, largely inhabiting the rural areas. This is best explained through the minimal group paradigm, which has demonstrated how people's desire to distinguish themselves from others based on group memberships, and their willingness to sacrifice absolute levels of rewards to maintain superiority over others occur (Harwood, 2020). It is asserted that the struggle for integration by the middle class strata is important in two ways. First, it plays a crucial function of enabling us to articulate fundamental precursors of necessary socio-economic change. Secondly, it highlights wrong perceptions on social relations or intergroup relations and access to imperial institutions that are erroneously perceived as supposed enablers of capabilities expansion and achievement of human wellbeing.

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