

## **Where and What (for) is the Middle? Africa and the Middle Class(es)**

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### *Introduction*

The EADI General Conference 2014 under the title “Responsible Development in a Polycentric World. Inequality, Citizenship and the Middle Classes” happened to be more mainstream than maybe anticipated at the time when the topical focus was discussed and decided upon in the Executive Committee. This was however no disadvantage for the deliberations. Rather the opposite: thanks to an already ongoing process of also critical engagement, the exchanges turned out to illustrate the diversity of assessments. While the verdict on the current role of the middle class(es) remains pending, it became obvious that more scholars than originally expected had started to reflect on this phenomenon.<sup>i</sup>

Not by accident Göran Therborn (2012) already wondered if we are entering a century of the middle class. He observed that the working class seemingly had been removed from our memory. The project of a worldwide emancipation under the leadership of the proletariat was instead replaced by a universal desire to obtain a middle class status. He takes the evidence from the OECD report on global development perspectives (OECD 2011), which emphasized the need to consolidate the growth of the emerging middle classes, and the advocacy role by Nancy Birdsall (2010) and the Center for Global Development she heads as an influential think tank. In a world, so Therborn’s conclusion, in which the relevance of the working class and of socialism has been declared obsolete, the middle class society emerges as the symbol of an alternative future (Therborn 2012: 17).

### *Global Realignments: (In)equality and development*

The United Nations Development Programme’s 22nd Human Development Report (HDR) for 2013 had a trendy focus on the new global players that had emerged from the Southern hemisphere, or rather what is termed the “global South”. This also included a prominence given to the middle classes as a beacon of hope. The seemingly good news presented, is that over the last twenty years almost all countries had improved their human development status. Of 132 countries with a complete data series, only Lesotho and Zimbabwe had a lower Human Development Index (HDI) value in 2012 than in 1990 (United Nations Development Programme 2013: 12).<sup>ii</sup>

The report, however, also concedes that, whatever the changes, the developmental challenges have not been significantly reduced: “An estimated 1.57 billion people, or more than 30% of the population of the 104 countries studied for this Report, live in multidimensional poverty.” For many of the rapidly growing Southern economies, the

population living in such multidimensional poverty (which adds to the somewhat misleading per capita income measure overlapping human deprivations in health, education and standards of living) exceeds the number of those in absolute poverty as measured by monetary income. In addition, income inequality is on the rise, with 23 per cent of the HDI value lost to inequality based on 2012 calculations for 134 countries (United Nations Development Programme 2013: 13 and 14). The HDR 2014 adds that while inequality has on average not been a contributing factor to HDI decline recently in most regions, “disparities in income have risen in several regions” (United Nations Development Programme 2014: 2).

The HDR 2013 therefore already stresses “the imperatives of ensuring that concerns of equity and sustainability are fully incorporated into future policies and strategies,” since “continued human development progress is unlikely if inequality and environmental destruction are not moved to the forefront of policy discussions.” It continues: “Under worst case scenarios, a business as usual approach to development combined with the environmental crises could reverse human development gains in the South or make this progress unsustainable” (United Nations Development Programme 2013: 2 and 3). One is tempted to add that this is not only a kind of collateral damage for societies in the global South. As the Civil Society Reflection Group on Global Development Perspectives (2012) outlined in its report on the occasion of Rio+20, if the dominant, unsustainable development paradigm is not decisively reversed, we face a likely setback for human development on a global scale.

By striking contrast, the HDR 2013 avoids calling a spade a spade: “While there is much awareness at the global and regional levels that the world is in transition, leaders, institutions and academics seemingly find it difficult to put forward principles, institutions and policy recommendations that can secure the next steps in creating a more just and sustainable world” (United Nations Development Programme 2013: 4). So then, how does the new discourse on the middle class(es) relate to such challenges? What is the fundamental difference required that such social layers can make, assuming that generally their aspired lifestyle suggests rather more of the same in terms of the unsustainable reproduction of industrial societies? What is the “historical megatrend” proposed by *Jürgen Wiemann* (2015), if production and consumption patterns remain within the dominant parameters? He maintains: “Economic growth and the rise of the middle classes are mutually reinforcing” with an “ever-expanding and predictable demand for consumer durables such as refrigerators, washing machines, air conditioners, TVs and cars”. What is new about such a trajectory and how can it re-shape the trend to live above the world’s means in terms of natural resources and fossil energy consumption with the ever-increasing effects of CO2 emissions and the impact on climate change? *Wiemann* rightly points at “the natural limits on the input side of the metabolism of industrial societies” and the “sink capacities of regional ecosystems and the global ecosystem”. He therefore also warns, “all people above the poverty line will have to restrain their material and energy consumption”. While I agree, I have my doubts that this is a message that goes down well with the much praised emerging new middle class(es)... At the EADI General Conference, analyses with reference to these new middle class(es) seem to confirm that the tendency is in the main a rather uncritical desire to follow the established (unsustainable) consumption patterns of the

“old” middle classes in industrialized countries or at best, an ambivalent and mixed response to pressures on the status of the new middle class(es)

### *Development and the Middle Class(es)*

This actually brings us closer to the core of the matter, the tendency towards growing inequality within as well as between societies. This does not go unnoticed in the HDR report 2013, which identifies “a ‘south’ in the North and a ‘north’ in the South. Elites, whether from the North or the South, are increasingly global and connected, and they benefit the most from the enormous wealth generation over the past decade, in part due to accelerating globalization” (United Nations Development Programme 2013: 2). The emerging middle class(es) seem to be at least partly beneficiaries of the new wealth creation and selective distribution. *Peter Knorringa* and *Alejandro Guarin* suggested in their initial theme proposal for the EADI General Conference that parts of these middle classes could also contribute to “a push towards less inequality and more sustainable production and consumption processes” (Knorringa and Guarin 2013: 1). But one wonders if this “light of hope for positive change” (ibid.) is not more wishful thinking than indeed a realistic assessment. After all, the authors also acknowledge that while middle classes seem to be “actors whose relevance for development cannot be ignored”, they might be “both part of the problem and of the possible solutions” (ibid.). They rightly point at the ambivalences and ambiguities concerning the current assessments of the role of the middle class(es) while concluding that “as a developmental actor they have remained relatively invisible in much of the scholarly and policy debate” (Knorringa and Guarin 2013: 3). The contributions to and vibrant debates at the EADI General Conference were evidence that this is changing. In the meantime there seems to be an engagement with middle class(es) bordering almost to a hype. One is tempted to ask *cui bono?*

This leads to the effects and role anticipated for the middle classes as the proclaimed bearers of the so-called development torch. The HDR 2013 predicts a massive expansion and global reconfiguration of the middle class: “Between 1990 and 2010, the South’s share of the global middle class population expanded from 26% to 58%. By 2030, more than 80% of the world’s middle class is projected to be residing in the South and to account for 70% of total consumption expenditure.” The prognosis assumes that two-thirds of this middle class will be in Asia and the Pacific, one-tenth in Central and South America and a bare two per cent in sub-Saharan Africa (United Nations Development Programme 2013: 14).

This places Africa’s future in a less optimistic perspective, and reminds us that the resource boom is not necessarily feeding the majority of people on the continent. A recent performance analysis of 42 countries in sub-Saharan Africa suggests that, compared to other countries similarly placed socioeconomically, most of them are still at the lower levels of the performance index and will find it difficult to keep up (Kappel and Pfeiffer 2012). And this will be the case notwithstanding recent significant increases in growth rates. Already a report by UNIDO/UNCTAD (2011: 105) offered the sobering conclusion that the share of manufacturing value added in Africa’s GDP fell from 12.8 per cent in 2000 to 10.5 per cent in 2008, while the share of manufactures in

the continent's total exports fell from 43 per cent to 39 per cent during the same period. Furthermore, labour-intensive manufacturing played a limited and even reduced role, not a promising trend in the fight against growing unemployment. Despite above-average economic growth rates during the last decade, mainly as a result of extractive industries as part of the resource boom, "the size of the labor force, already characterized by significant open unemployment and under-employment (is) set to surge," leaving "no room for complacency" (International Monetary Fund 2013: 19). But how can a middle class consolidate while high unemployment remains a chronic feature of Africa's societies? Not surprisingly, then, "Africa continues to be the least competitive region on average worldwide, trailing more advanced economies across all competitiveness indicators" (World Economic Forum 2013: 26).

The acclaimed social stratification associated with a significantly growing middle class not only verges on wishful thinking in the context of Africa, but is also at odds with trends elsewhere: the middle class in Europe, for example, is expected to stagnate (as the figure 4 in the HDR 2013 illustrates), and may even be at considerable risk, under threat and in decline (Boyle 2013). But over and above all this, what is particularly problematic is the current definition of middle class (even setting aside the almost exclusive emphasis on the financial/monetary aspect, at the expense of considerations of professional and social status, cultural norms and lifestyle related attributes as well as political influence). "Middle class" as "a very heterogenous group" (Knorringa and Guarin 2013: 1) is increasingly used in an inflationary manner (?) to cover almost everything, thereby signifying little to nothing. This is a far cry from the petit bourgeoisie of class analysis, and is devoid of almost any analytical substance.

Following a category developed by the Brookings Institution (2012), the HDR 2013 uses a daily income or expenditure of between US\$ 10 and US\$ 100 to define a middle class (see also Kharas 2010). This is a generous numerical definition, which embraces a wide range of middle class(es) in the plural, right down to the precariat in the industrialised countries, which display fast growing social disparities (Standing 2011). World Bank Chief Economist Martin Ravallion (2009: 17) advocated an even more flexible definition of middle class in the developing world, with a household consumption per capita of US\$ 2 to \$ 13 a day at 2005 purchasing power parity. The \$ 2 threshold was also a reference point in a 2011 briefing by the African Development Bank, which declared that over 300 million Africans, or one-third of the continent's population, had entered the middle classes.<sup>iii</sup> A review in 2012 reconfirmed the bank's almost obsessive gospel about the role of the middle class in the continent's rapid and accelerated development: the "rise of Africa's middle class, now thought to number between 300 and 500 million people" is identified as a "key factor" (African Development Bank 2012: 13). Since then, the (non-)existence of significant middle classes and the prospects for meaningful socioeconomic development have triggered a vibrant debate even in public media on the proclaimed rise of Africa.

It requires substantial creativity to visualise how the defined minimum income or expenditure (be it a paltry US \$ 2 a day or even the substantially higher US \$ 10) allows for a lifestyle and social status that qualifies as middle class even in African societies. That, in turn, feeds considerable doubts that such a middle class could play a pioneering

role in the transformation of societies towards greater social justice and less inequality (cf. Furness et. al. 2012). Ravallion (2009: 17) is honest enough to admit that such a definition of middle class is at best precarious, since “the vulnerability of this new middle class to aggregate economic contraction is obvious: one-in-six people in the developing world now live between \$ 2 and \$ 3 a day” – and they are all part of a so-called middle class?! As Raphael Kaplinsky from the British Open University remarked a bit flippantly but to the point in his lecture at the EADI General Conference in celebration of the 25<sup>th</sup> anniversary of this journal, such a category means that everyone not starving qualifies as middle class...

### *The Middle Class(es) in Africa*

The ominous middle classes have emerged as a flavour of the year (?), including development studies concerning Africa. They have sneaked as a popular subject into African Studies as well. The discovery of the middle class(es) is however by no means as new as this trend suggests.<sup>iv</sup> New is their welcome as light at the end of the developmental tunnel for Southern societies - at times suggested without the faintest concern that this light might only be the train approaching. What feeds the belief that such a middle class is indeed “a light of hope for positive change” (Knorringa and Guarin 2013: 1) promoting sustainability and contributing to more equality and fairness? As a recent result in the Afrobarometer Survey suggested, “middle-class persons display a pervasive suspicion that their fellow citizens are incapable of casting a responsible vote. Afrobarometer surveys repeatedly show that, as education rises, individuals are more likely to agree that ‘only those who are sufficiently well educated should be allowed to choose our leaders’ and to disagree that ‘all people should be permitted to vote, even if they do not fully understand all the issues in an election’” (Bratton 2013: 281). The conclusion warns that neither economic growth nor the proclaimed rise of a middle class automatically heralds the spread of democratic values. In her case study on India, *Isa Baud* (2015) illustrates the political ambiguity of the urban middle class, tempted and tending to enter a pact with the politically dominant elites rather than to side with the “underdogs” in society. As she concludes, “the increasing mobilization of the new middle classes takes place mainly in relation to their own values of modernity, in which the poor are becoming increasingly marginalized and devalued”. Like elsewhere, significant parts of the Indian middle class(es) rather tend to side with those in power and appropriate the means to improve their own position by bargaining with the government. As *Kees Biekart* (2015) suggests with reference to Argentina and Brazil, resource extraction in these countries translated into growing middle classes, which now are faced with new tendencies of erosion. Hence they have to make a decision if to act in solidarity with the poor or go for the ‘(self)-caring’ option.

*Wiemann* (2015) also points to the “political ambivalence of the middle classes” and refers to the historical experience of the Weimar Republic and Nazi Germany. Quite a number of contributions to the EADI General Conference stressed in different but related contexts the rather narrow self-interest, which guides middle classes in different societies of the world (cf. Dembowski 2014). Often the NIMBY (“Not In My Back Yard”) response dominates (Hollander 2014a), which limits the potential contribution of such behaviour to less than is urgently required by a notion of global

solidarity when (re-)negotiating the world's social contract in an effort to (re-)gain sustainability (Hollander 2014b). As little as middle class(es) often contribute to fairer societies, as limited is their impact in terms of international solidarity towards a better world, as despite many illusions some of the EADI conference's plenary discussions documented (Quak 2014).

As Sumner (2012: 36) reinforces in general terms, the existence of such a growing middle class might not necessarily have redistributive impacts in terms of social policy if there is little support among the more secure middle classes for paying more taxes. After all, as also noted by Knorringa and Guarin (2014: 2): "The interactions between the elites and the middle classes ... are crucial for the legitimacy and the stability of their political regimes". – No wonder then, that also a variety of contributions to the EADI General Conference offered testimony to the stabilizing role middle classes tended to play in rather unequal and undemocratic settings such as China and a range of Latin American states, where middle classes more often than not were in active support of totalitarian regimes and efforts to overthrow leftist governments.

A recent IMF Working Paper conceded that economic growth rates – considered a precondition for the expansion of a middle class and redistributive effects – do not automatically translate into social progress. Examining the correlation between growth dynamics in sub-Saharan Africa and social indicators, Martinez and Mlachila (2013: 22) concluded that, "for the most part there is little correlation between growth and social indicators in general" and that "growth is but an ingredient in the dynamics." They state further: "While in principle growth should increase the amount of available resources to undertake social programs, the success hinges crucially on a complex interaction of a number of institutional and policy factors." However, a middle class is no guarantee of policy factors conducive to greater socioeconomic equality and improved living standards for the poor.

The middle class(es) as source of hope seem to be wishful thinking, if not an ideological smokescreen. They are the flip side of the "continent of hope" propaganda, the prevailing currency for promoting investment opportunities for external actors in resource extraction. Middle classes seem to come in handy as justification for the notorious "trickle down" effect, in the absence of any meaningful employment creation or local capital accumulation through value added activities. As even the African Development Bank (2012: 13) has to admit, income inequality as measured by the Gini coefficient has widened in recent years, and six countries in sub-Saharan Africa are among the world's ten most unequal countries. At the same time, none has achieved the goals set with regard to poverty reduction in the first Millennium Development Goal. Even the global trend is no reason for enthusiasm: "more than 15 percent of the world's people remain vulnerable to multidimensional poverty", while "nearly 80 percent of the global population lack comprehensive social protection". At the same time, some "12 percent (842 million) suffer from chronic hunger, and nearly half of all workers – more than 1.5 billion – are in informal or precarious employment" (United Nations Development Programme 2014: 2).

### *Conclusion: The Middle Class(es) and Development*

As other analytical projects show, it is neither the middle class(es) nor the upper fifth of the income pyramid that has any influence on the distribution of wealth in societies. They too are at the receiving end. It is indeed the top decimal (if not the top 5 per cent or an even smaller fraction) among the haves that has grasped the steering wheel. Their forms of appropriation and enrichment are the ultimate determinants of the scope and limit of poverty reduction by means of redistributive measures in favour of those in the bottom half of society. To understand inequalities and the mechanisms of their reproduction, the motto coined by Palma (2011), based on his pioneering work, is apt: "It's the share of the rich, stupid." Even Nancy Birdsall (2010: 11), who has continued high hopes of the indispensable middle class, admitted that in many developing countries "the relevant political economy might better distinguish between the rich – with political salience – and the rest."

While a background paper compiled ahead of the EADI General Conference engaged in much detail with conceptual issues of the middle class(es), it concentrated almost exclusively on a merely economic positioning of these social strata (Wietzke and Sumner 2014). This at least underscored the randomness of interpretations, which is not solved by introducing sub-divisions such as lower, middle and upper middle classes. Rather, this underlines the arbitrary character of such terminology in the middle class debate. This fuzziness risks a futile debate, which ends in a cul-de-sac. One is tempted to suspect that the middle class(es) hype in some of the contexts we witness seeks to propose a historical mission of these social layers in terms of future perspectives, which in the light of the real (also material and political) power relations and structures of societies and the global economy they are never able to live up to.

In her contribution to this Debate, Birdsall (2015) combines several hypothetical assumptions resulting in such a scenario pinning hopes on the growing middle class(es) as a relevant (if not decisive!) contributing factor towards better governance: that economic growth continues unabated; that inequality would not increase further but could decline; that "a larger middle class has a greater interest in a responsive and accountable government"; and that "a larger middle class is more likely to support a social contract in which the taxes it pays are largely channeled to collective and public goods from which all – including the strugglers and the poor – benefit." This seems to me in tendency a scenario bordering to wishful thinking, which detracts from the real challenges we are confronted with in a world of growing inequalities. Allocating such strategic prominence to the emerging middle class(es), elevating them into a historic mission they are expected to fulfill, at the same time allows the really rich to get off the hook again and thereby overlooks the real dimensions of class and power at play when it comes to shaping social realities.

An Oxfam paper reminded us recently – based on data in Piketty (2014) as well as supplied by *Credit Suisse* and *Forbes* – that about 46% of the world's measurable wealth (some 110 trillion US\$) is in the possession of one per cent of the world's population. This is 65 times as much as the lower half of the world's population has to share with about 0.71% of the global wealth. The super rich one per cent increased in 24 of 26

countries measured between 1980 and 2012 their share in the wealth further, while 70 per cent of the global population lives in countries, in which inequalities further increased during the last 30 years. 95 per cent of the US-American economic growth since the financial crisis ended in the pockets of the richest one per cent of society, while 90 per cent of the population became poorer. The 85 richest people in the world control about the same proportion (0.71 per cent) of the global wealth, from which the world's poorer half has to live (all data from Fuentes-Niva and Galasso 2014).

With reference to the middle class(es) debate Therborn (2014: 10) stresses that discourses on class – whether right or wrong – are always of social relevance. The world wide boom of the middle class(es) debate is therefore a remarkable symptom of our decade. The social class will remain also in the future a category of central importance. But as he states elsewhere, it remains to be seen if the future social developments will be characterized more by the new middle class(es) or by the plebeian masses (Therborn 2012: 27 and 29). – Or maybe by the hardly one hundred super-rich individuals, who possess about the same as half of the world's population?

*Wiemann* (2015) concludes his contribution by pointing to the challenge “that old and new middle classes remember that all are travelling in the same small spaceship earth and will contribute to its final collapse if they do not manage to bring their lifestyle and consumer demands in harmony with the carrying capacity of the global ecosystem”. Yes, that indeed seems a valid and relevant insight to end with. But how can this be achieved, if the on-going neoliberal approach to capitalist (re-)production continues its destructive operations, with the new middle class(es) being actually an integral part of the old system and far from being something new as radical as required? Pinning hopes for social advancement on the emerging middle classes, as *Birdsall's* (2015) optimistic conclusion suggests, is like the trust that those who row the galley will decide its course. Meanwhile, the captain and his adjuncts are navigating from the commanding bridge, and are not rowing at all. The ordinary crew keeps the galley moving, but only a handful others defines, decides upon and coordinates the course guiding the way – unless there is mutiny on the *Bounty*, or the spaceship.

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<sup>i</sup> My own engagement was motivated initially to some extent by the internal debate in the EADI Executive Committee around the theme for the General Conference. As a result, this contribution is based in parts on earlier work (Melber 2013 and 2014). I thank Jürgen Wiemann for inviting me to this debate and his comments on a first draft of this text.

<sup>ii</sup> However, the problem of reliable and secure data, especially in African countries – as repeatedly discussed by Morten Jerven (2013a, 2013b) – is not acknowledged.

<sup>iii</sup> In contrast, Sumner (2012: 37) dubs the \$4 to \$10 group the "in-betweeners", i.e., between poverty and a secure middle class lifestyle.

<sup>iv</sup> One just needs to remember the works of Frantz Fanon and Amílcar Cabral, who discuss the African petit bourgeoisie of their days (kind of tantamount to today's middle classes, so seen from a more aware class analytical perspective) half a century ago with differing conclusions.