

# **South Africa's black middle classes between 2009 and 2018**

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## **ABSTRACT**

This article considers the social and political action of South Africa's black middle classes during the Jacob Zuma administration (2009 and 2018) during which the governing party fragmented in a disorderly way, partly dissolving traditional class lines. Swathes of black middle classes left the governing party to join the militant Economic Freedom Fighters, new smaller parties and the main opposition party (the Democratic Alliance). The class-based fallout was consequential for the governing party, as it was for theories of middle classes. Using South Africa's experience, this article offers a critique of the dominant neoliberal tradition which imagines an orderly and politically homogeneous class. It further argues that social and political action among the black middle classes should not be viewed as generic, it is rather shaped by dynamics unique to South Africa, including social memory. This, it is argued, blurs class behaviour as articulated by prevailing class theories.

**KEYWORDS:** South Africa; black middle classes; class; social action; political action

## **The theorising of middle classes and social action**

Why and how do middle classes engage in social action? What agency do they employ if at all? This article makes efforts to answer these questions through the lenses of black middle classes in South Africa. There is increasing scholarly work which suggests that traditional theoretical tools are ill equipped to explain the social and political behaviour of middle classes from the global south. This scepticism and questioning of social and political action by middle classes, seems to occur in opposition to notions of middle-class homogeneity theorised in the global north.

How do we explain protests which are adjudicated by the members of society who are not part of the working class? Cleveland (2003) explains this anomaly by arguing that middle classes are generally absent in social and political action. This he does before he consequently puts forward the theory of what he labels as 'young adults' nucleus', a diversity made up of radical (Gramscian) intellectuals, socialised into social action and 'advanced elements from groups that experience some form of exploitation, oppression or collective hurt' (Cleveland 2003, 1). Braga (2019) sees the possibility of middle-class protests, arriving at the conclusion that class struggle exists in a form that is far from class in a Marxian sense. Braga (2019, 487) articulates social and political action as an outcome of

[d]ialectical polarities and reconciliations, within a field of social forces that oscillates between traditional forms of organisation of subalterns and new movements that are distant from a well-defined class identity.

In this search for dialectic logic, Braga (2019) invokes Thompson's works, namely *The Moral Economy of the Crowd* (1971) and *Class Struggle Without Class* (1978). Both Thompson's articles focus on eighteenth-century British society. On the moral economy of society, Thompson (1971) warned that notions of 'mob' and 'riot' should not be considered in ahistorical sense. In other words, people engage in protests in part because they re-visit the historical canvas, where their past social memory spurs them to present social and political action. For Thompson, this social memory was in part responsible for the French Revolution. In *Class Struggle Without Class*, Thompson (1978) cautioned that traditional stratification of society is too imprecise, and often misleads rather than serves useful analysis of modern society. There are, according to Thompson, too many shadow lines which move back and forth, constantly pulling and pushing the traditional boundaries of class.

### **The inadequacies of neoliberal orthodoxy on middle classes**

Focusing on South Africa through what is widely accepted as a turbulent decade in economic, social and political terms, this section looks at the context and form in which neoliberal orthodoxy conceptualises middle classes. In passing, it is important to cast light on the historical theoretical framework of understanding class as a broad concept, and black middle classes in South Africa as a specific franchise.

There are at least two main strands from which the concept of class derives. The first is a combination of Marxist and Weberian perspectives of class, upon which the dominant analysis of class relations is situated. Broadly, Marxist (and neo-Marxist) analyses of class focus on antagonistic social relations of different classes, based on exploitation (Li and Singelmann 1999). The Weberian school mainly understands class from unequal life chances, and the ability (or inability) to procure material and social goods (Gerth and Mills 1948). Neo-Marxists draw a distinction between the working class and the middle class, the non-propertied and propertied classes respectively (Southall 2004). Neo-Weberian thought concentrates on admission to a social class on the basis of income, occupation, education and other life chances (ibid). The neo-Marxist and neo-Weberian traditions consider development mainly as a failed enterprise, producing wealth for a handful while at the same time creating a burgeoning but precarious working class.

The second main strand is the neoliberal orthodoxy, which treats class in a rather limited sense, and mainly devotes attention not so much to who constitutes which class, but to the character of class, specifically, the middle class. Given the charge of exploitation by Weberian and Marxist scholars, it seems convenient for the neoliberal school to avoid theoretical engagements on the social conflicts produced by neoliberal development rhetoric and practice. Thus, the neoliberal debate on class is mainly in reference to middle classes, and, even then, the fortunes rather than the precarity of this class. From the turn of the twenty-first century at least, this (neoliberal) tradition has been more obsessed with a romanticised view of the global middle class, presenting an image of an orderly, socio-economically active (and therefore democratic), and manifestly consumerist class. There is a contextual motivation for this kind of middle-class masking, so to speak, to which the article now turns.

The neoliberal focus on middle-class is easily traceable from suspicious optimism after spectacular failures of the development enterprise through the second half of the twentieth century. By the 1980s, development narratives were accused of reinventing the wheel, with nothing new to offer – what Booth (1985) labelled as the death of development. Booth was not a lone voice. In 1990, in *The Anti-Politics Machine*, James Ferguson rendered similar conclusions on development theory and practice in Lesotho, warning that development practitioners tended to measure the success of development based on terms that were abstract from the experiences of the intended beneficiaries (Ferguson 1990). Hart (2001, 1) further purifies these critiques of development, concluding that development suffered more than an impasse; it was ‘definitively dead, sending out noxious fumes that could only be dissipated by market rationalism or social movements’.

On the whole, the market rationalisation pathway seeks to recover a failing discourse. The early 2000s were thus inundated with development rehabilitation efforts, with minor discourses (re)forming around social capital, social development (Hart 2001) and labour market dynamics. The focus on middle classes forms part of this emergent recasting of development theorising (see, for instance, OECD 2015). Along a neoliberal tradition, middle classes have been considered as critical players in industrialisation, urbanisation and bureaucratisation (see Lentz 2015). This tradition is propped up by global financial institutions, among them the World Bank, the Asian Development Bank and the African Development Bank. Perhaps the convergence of financial institutions in defining and promoting African middle classes might provide a glimpse of the capitalist intentions attached to the definitions and meanings of African middle classes.

Who, then, are these African middle classes? Sociologists, economists, anthropologists have all attempted to engage the meanings and definition of African middle classes. Even then, there are no clear definitions yet, thus Spronk (2018, 316) observes that African middle class is still ‘... a classification in the making’. There is an emerging consensus around the character (rather than the definition) of middle classes. While there are economic attempts to consider ownership of assets and income, such efforts fall short of the economic dynamism of this class. For example, the classification of middle classes by the African Development Bank as those earning between US\$2 and USD\$4 a day is purely a monetary classification and lacks cognisance of consumption and voting behaviours (see Mercer and Lemanski 2020).

The definition of middle classes in South Africa is as unclear as it is globally. What is perhaps unique in South Africa is the intersection of class and race traceable from the grandeurs of apartheid policies which promoted the racialisation of poverty and inequality by affording white South Africans better education, access to land, job protection and facilitated social mobility through a range of skills development programmes (Clark and Worger 2004). These same racial policies trapped black South Africans in low or semi-skilled labour, poor education, poor access to basic health, and limited property rights. After 1994, the subsequent administrations have employed racialised affirmative action to enable ‘catch up’ through provision of preferential access to education and economic opportunities.

While white middle classes in South Africa have existed for almost a century, the *growth* of a black middle class is a relatively new phenomenon. This is not to say that black middle class was absent altogether before 1994. It was however not as consequential economically as it is in contemporary South Africa. Besides, blacks could not vote, neither were their property rights as protected by law as for the white middle classes. While the efforts to find the real meaning of black middle classes in South Africa are largely muted, debates are more focused

on the behaviour of this class which is distinguished by what it is not. It is not propertied, neither is it a working class in the Marxist sense.

Supported by marketing agencies and the media, the neoliberal narrative plays out in South Africa, themed with notions of ‘classness of middle classes’ underpinned by symbolism of democratic consolidation (Resnick 2015), the value of size (Kharas 2010) and noticeable consumption (Murphy, Schleifer, and Vishny 1989; Schor 1999). This tripartite symbolism holds that the larger the size of middle class, the more orderly a society becomes; the more the rise of consumption the better growth outcomes. It follows that theories of social or political action are constructed upon this stylisation of what a middle-class society might look like.

This conceptualisation, then, suggests that for South Africa, the black middle classes do not necessarily engage in messy social and political conflicts. Neo-Marxist analyses dispute such analysis, and instead charge capitalism with muzzling the proletariat and what Standing (2015) refers to as *the precariat class* through the creation of labourism. This charge is associated with a second one, namely, fundamental misrepresentation of middle classes. In the efforts to correct these utopian (western) visions of middle classes in the developing world, Carrier and Kalb (2015) contend that the global middle-class discourse is a capitalism conspiracy, an expedition to calm potential conflict between the upper class and the working class. *The Rise of Africa’s Middle Class: Myths, Realities and Engagements* (Melber 2016) concludes that the hopes attributed to the so called rising middle classes might be at least wishful thinking, at most an ideological smokescreen. Along similar conclusions Musyoka (2016) argues that far from being the silver bullet to development, South African black middle class is trapped in a highly precarious crucible, unable to fulfil the sorts of development prophecies of neoliberal orthodoxy. Mattes (2015) as well as Ndlovu and Dzulani (2020) have issued similar caution.

### **Social and political action of the black middle classes**

The foregoing raises fundamental questions on where exactly the black middle classes in South Africa should be located in existing regimes. If we follow Southall’s (2004, 522) modified definition of South African black middle class as those who earn income from ‘nonmanual labor, “white-collar employees”, managers, self-employed businesspersons, or professionals’, students do not fit into any of this category. Similarly, supposing that the neoliberal school is right, then the political action of the black middle classes over the past decade makes no sense. The disjuncture between the social and political realities exhibited by the black middle classes and the one size fits all theoretical lenses raises more questions than it offers answers. This incongruence also casts shadows on the sufficiency of traditional methodologies of articulating social behaviour among social classes.

Three propositions attempt to uncover the difficulties which face the attempts to situate the black middle class in South Africa in pre-existing templates. The first proposition discounts the neoliberal packaging in a negative sense, while the second and third propositions provide reasonable answers to social and political action among black middle classes in South Africa.

Proposition one: Cleveland’s (2003) explanation that middle classes are generally absent in social and political action. This argument fails to explain the black middle class social action in South Africa, although his young adults’ nucleus theory might offer partial answers. It is partly factual that South Africa consists of Gramscian radicals, and young adults socialised

into social action and sections of society which collectively identify with exploitation (Cleveland 2003). But the mass social and political action seen over the past decade clearly consists of more than a handful of peripheral infiltrators. Thus, Cleveland's view does not solve the South African middle-class problem of social and political action.

Proposition two: The prevailing neoliberal analysis of middle class seems to wear a neat 'individualised' mask as it were, a social behaviour largely prevalent in Western Europe economies for centuries. Which is to mean, the romanticised view already discussed in the article treats middle classes in the global south as individuals, rather than households. Consequently, prevailing analyses of middle classes seem to focus on what an individual can do based on their social status, as if their interests are not linked to social networks (including household members) who might not share a similar social status. To analyse South African black middle-class households in the same way that middle classes were analysed in seventeenth century Europe – a small number of people held by physical border lines, and thus living in a particular geographical place – is outdated. A twenty-first century South Africa requires re-visiting the realities of a South African household in order to understand the social and political actions of the black middle classes. In South Africa, to ascribe middle-class lifestyles to individuals rather than households is a major blind spot, not least given the historical distortions of households due to forced labour migration. The western individualistic framework reveals very little about the real-life experiences of black middle classes, and the non-income factors within which the social behaviour of this class emerges.

Proposition three: Finally, revisiting Thompson (1971, 1978), socio-historical dynamics shape a different kind of middle class in South Africa. If the French Revolution was partly fuelled by social memory as Thompson argues, then social and political action among the black middle classes is better understood in light of Thompson's lenses. The *fallist* campaigns were for example underpinned by socio-historical solidarity with poor students and outsourced workers. Following Thompson (1971, 1978) and Braga (2019), this article argues that social and political struggle in South Africa employs more than what Braga (2019) refers to as well-defined class identity, and therefore social memory seems a reasonable explanation in reference to South Africa's black middle classes.

What follows is an attempt to demonstrate evidence of social behaviour and action by the black middle classes. The social action and behaviour discussed provide useful lenses in understanding the shortfalls of prevailing ideological traditions. Notably, the study focuses on the period covering the Zuma presidency (2009–2018).

### **South Africa's lost decade? Middle-class spaces of social and political action**

Although there are varying accounts of the impact of the Zuma presidency on political and economic stability, the dominant narrative finds consensus in what has come to be known as 'the lost decade'. In the context of South Africa, the 'lost decade' mantra gained attention in January 2019, when President Ramaphosa made an argument in Davos that South Africa was emerging from a decade-long dark economic cloud. The media and scholars seized the occasion to explore whether there was any merit to this argument. There were some gains which suggested that the government was serious on minimising the sorts of socio-political conflicts which plagued the Mbeki administration a decade earlier. Reduction of HIV /AIDS related deaths is one of the commendable achievements of the decade under investigation. According to Statistics South Africa (2018), AIDS related deaths decreased from 42.06% in 2007 to 22.18% in 2018. This was largely due to the roll out of the largest HIV treatment

programme in the world during the Zuma administration. This was a major step forward, considering that just a decade earlier, the Treatment Action Campaign had won a court case against the government's apathy towards HIV / AIDS treatment.

During the Zuma administration, however, there was a notable decline in gross domestic product (GDP) growth figures (from 3.6% in 2008 to 1.3% in 2017), increasing unemployment (22.5% in 2007 to 27.6% in 2017), as well as decrease in export and gross capital formation (African Development Bank 2018). Based on poor performance of these indicators, on the whole, South Africa was the worst performer in the region over the course of the 2008–2018 decade (ibid). The government responded to high unemployment levels with an expansion of social grants, from covering 11.8 million South Africans in 2008 to over 17 million in 2017 (South African Social Security Agency 2019). In other words, by 2019, a third of the population was under social grants coverage. In 2017, there were three million more people below the poverty line than in 2009 (Statistics South Africa 2018). Considering public sector corruption, according to Transparency International's Corruption Perception Index, out of 180 countries, South Africa ranked number 54 in 2008, falling to 73 in 2017 (Transparency International 2018), government debt to GDP almost doubled from 27.8% in 2008 to 53.1% in 2017 (Statistics South Africa 2018) and between 2007 and 2017, electricity tariffs increased by 356% compared to a 74% inflation increase (Strambo, Burton, and Atteridge 2019).

These statistics point to a reasonable case for a lost decade, bearing almost similar characteristics as the Japanese economy in the 1990s, except on a larger scale. The social and political reactions to state failure in South Africa were, of course, not muted. The social and political action demonstrated by an alliance between the working class and the black middle classes over the last decade challenged Southall's (2004) postulation that the black middle classes could not bite the hand that feeds them. The mounting pressure of poor governance and the accompanying opportunity costs and social memory produced a desperate reaction, it seems, such that the black middle classes bit the hand that was wiping away their future economic opportunities, and those of their kinship relations.

There were many service-delivery protests through the period under study. Through Zuma's presidency, there were continuous pressures from the black middle classes, with periodic political actions. The state responded to the 'disruptions' by calling the black middle class to order, when it seemed to 'stray'. The study focuses on three aspects of public discourse which intersect with the black middle-class debate, namely, (a) ongoing political support (b) white monopoly capital and local government elections outcomes and (c) the *fallist* movement. The context and content of these three major intersections with the black middle class are presented below.

### ***Ongoing political support***

In an interview with *City Press* in June 2014, the former ANC Secretary General Gwede Mantashe warned the new black middle class that it was morally indebted to support the ruling party mainly because they

are beneficiaries of [the] progressive policies of the ANC [and they] must appreciate the history and where we are today ... we should engage them, raise their level of consciousness so that when they take decisions, it is not on the basis of an incident or one issue. (15 June 2014)

By claiming the need to ‘raise their level of consciousness’ Mantashe expected nothing less than loyalty from the new black middle class. In even further castigation of the new black middle class, Mantashe argued that ‘... those who stand to benefit from change ... must be able to defend that’ (*City Press*, 15 June 2014). Mantashe continued:

I find it strange for someone in the black middle class to neglect a party that promotes Black Economic Empowerment and employment equity and go for a party that says it should be all about ability, which these policies should come to an end. For example, the middle class in Gauteng should lead the debate on e-tolls, on world-class infrastructure of Gauteng. They should bring ideas, not *toyitoyis* [protests]. (*City Press*, 15 June 2014)

In the run up to the 2016 Local Government elections, President Zuma dismissed black South Africans who criticised the use of public funds to renovate his personal home, as ‘clever blacks’. This particularly delighted Zuma’s working-class supporters. The so-called clever blacks were considered as part of the dissenting voices, which posed a problem for Zuma’s state corruption project. And in 2017, the then Finance Minister Malusi Gigaba referred to the black middle classes as cowards, for what he considered as the tendency to criticise the government rather than criticise ‘white monopoly capital’ (*Business Day* 2017).

### ***White monopoly capital debate and local government elections outcomes***

The white monopoly capital (WMC) debate was advanced by a faction of the ANC, which blamed dissidents (including the black middle classes who raised concerns about the state of governance) as forming an alliance with white capitalists, against the majority of black working classes whom the state claimed to work for. As it would turn out, the push to legitimise the WMC narrative was a fraudulent exercise constructed and advanced by Bell Pottinger, a British public relations firm which was hired to rehabilitate public credibility of the state, following the capture of the state by private interests. This capture of the state was mainly adjudicated by an Indian family who had been naturalised in South Africa.

The influence of state institutions by a wealthy immigrant family was revealed in a scathing report by the Public Protector in 2016. In 2017, a report by the State Capacity Research Project, an interdisciplinary, inter-university research partnership argued that state capture was a caricature which

obscures the existence of a political project at work to repurpose state institutions to suit a constellation of rent-seeking networks that have been constructed and now span the symbiotic relationship between the constitutional and shadow state. This is akin to a silent coup. (Bhorat et al. 2017)

Even after the derisive exposure by the media, the debate on WMC raged on, within both the state and the governing party, so much so that a motion was tabled at the 2017 National Policy Conference (held from 30 June to 5 July 2017) to adopt the ‘WMC’ mantra as part of the ANC’s policy. Nine out of eleven commissioners voted against the motion, and the resolution was taken to moderate a debate around the challenges posed by monopoly capital in the country, without the ‘white’ prefix. It was a little too late, however, given the public buy-in at the time.

The WMC versus monopoly capital debate split social and political action broadly along working-class and middle-class lines. A majority of the working class rallied around Zuma's efforts to defend his administration against 'attack by whites' while the black middle class tended towards the monopoly capital (without the white prefix) camp. The black middle classes would demonstrate their discontent by shifting voting loyalty, which then led to the decline of the national support of the ANC from 65.9% in 2008 to 62.1% in 2014. The main opposition Democratic Alliance (DA) increased its voters share from 16.7% in 2009 to 22.2% in 2014, with the largest growth coming from the black middle classes.

Two years later, during the 2016 Local Government elections, in defiance of political stereotypes, the black middle classes delivered another blow to the governing party. Before the 3 August Local Government elections, the ANC controlled seven of the eight metropolitan municipalities across the country. The DA controlled Cape Town only. After the elections, the ANC lost control over four metropolitans to opposition coalitions – the country's executive capital (Tshwane), its economic hub (City of Johannesburg), Nelson Mandela Bay and Ekurhuleni. The ANC was only left fully in control of Mangaung, Ethekwini and Buffalo City. The DA retained Cape Town. The ANC was left intact in the rural areas, but in shambles in the metropolitan areas – where the black middle classes live.

### **The *fallist* movement**

Finally, there were series of student protests (collectively referred to as the *fallist* movement) which manifested in form of the 'Rhodes Must Fall' (RMF) campaign (March 2015), the 'Fees Must Fall' (FMF) campaign which started in October 2015 and 'Outsourcing Must Fall' (OMF) campaign which started in January 2016. The RMF campaign started at the University of Cape Town, and was directed against the statue of Cecil Rhodes, a British mining executive who advanced scientific racism under the rubric of British imperialism. This movement quickly gathered alliances among institutions of higher learning across the country, and effectively crossed international borders, no longer focused on Cecil Rhodes but on the global franchise of neo-colonialism. The FMF campaign sought to resist annual fee increases and the OMF campaign aimed at creating better working conditions for university non-core workers, who are traditionally outsourced under the excuse of cost cutting. The OMF particularly organised around solidarity, making interesting connections between the working class who worked hard under adverse conditions, to prop up middle-class students. Collectively, these protests were characterised by elements of violence, and they were supported by academic staff, activists and parents.

Of particular attention is that the state gave in to student demands, and thus withdrew the proposed 11.5% annual tuition fee increase in 2016. Led by black students, the *fallist* movement reflected a trisection of class, race and symbols of capitalism. In so doing, it confronted more than the 'access' question. It was attended by confrontation of symbols which were associated with capitalism, including the state itself. Ebrahim (2018) observes at least four themes emerging from the *fallist* movement: students as destructive vandals, violators of the rights of others, law-breakers, and agents of transformation.

These students were clearly not radical Gramsci intellectuals as Cleveland would argue. The parallels drawn between the *fallist* movement and the 1976 political uprising against apartheid might suggest that for South Africa, under given conditions, Thompson's social memory seems a more convincing premise to understand political action. In other words,



socio-political pressures tend to recast the black middle class to act in solidarity with the working class, even if this translates into sustained conflict with the state.

## **Conclusion**

The black middle classes inserted themselves into social and political action during the 2009–2018 decade, which coincided with the Zuma administration. Political action by the black middle class was significantly responsible for the decline of the governing party’s voter base and the growth of the DA. The black middle classes were also responsible for constant pressure on the state, a thorn in its side, as it were. The state responded by publicly reprimanding the black middle classes for not paying the piper.

The black middle classes were largely in support of the *fallist* movement. These political and social actions challenged the postulation that they could not bite the hand that feeds them. This challenges the dominant neoliberal tradition which imagines an orderly, socio-economically active, and manifestly consumerist class which holds the promise of development, especially in emerging economies such as South Africa. It must also be noted, however, that social and political action among the black middle classes in South Africa is shaped by dynamics unique to the country’s apartheid trajectory, including social memory.

## **Disclosure statement**

No potential conflict of interest was reported by the author.

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