

What is “Middle Class”? In Search of an Appropriate Concept

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In the current debate the middle class of the Global South is identified as a new group of consumers and it is seen as the carrier of democratic values and societal progress. But we know that protagonists of a liberal democratic opposition as well as followers of radical religious groups and supporters of the conservative authoritarian regimes are all part of the middle class. Obviously the middle class is not homogenous. Is the concept of middle class useful under these conditions? Are concepts of socio-cultural differentiation such as milieus or lifestyles applicable in the Global South even when cross-cutting elements like religion and ethnic identity play a much more important role than in Europe?

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Currently two debates with reference to developing countries refer to the term *middle class*. At the one side in development economics, the middle class is praised for its potential in consumption and economic development. At the other side, the discussion on current processes of democratization—for instance in the aftermath of the Arab Spring, or in processes after the wave of democratization in the 1990s—the middle class is seen as a (potential) carrier of liberal and democratic values. Altogether, middle classes are presented as drivers of economic and political change. In these debates, middle classes are situated in the “middle of the society” with a middle income and middle societal position, and authors refer to a background in education and claim that they are oriented toward the future and economic savings. At the same time, middle classes are seen as the backbone of civil society. This is linked with democratic and liberal orientations. Against this background, two questions arise. First, who constitutes the middle class and how can we define it? Being in the middle of the society is a very open definition (Darbon; Melber 115). Second-

ly, is there really a homogenous middle class, or are there in fact many middle classes? At least for the Global North, there have been doubts since the 1980s as to whether this homogeneity still applies. And the current political debates in the Middle East and North Africa also point at massive value differences in the middle classes of these countries. Therefore, I argue here for a more elaborated understanding of middle class that not only considers socio-economic criteria, but also socio-cultural differences between people with a similar socio-economic position. These socio-cultural variations do not simply follow ethnic or religious differences, but are rather represented by differing lifestyles with shared values and shared views of life, conceptualized as social *milieus* (Bourdieu; Flaig, Meyer and Ueltzhöffer; Mitchell).

An answer to both questions must refer to the current debate on middle classes in the Global South (1) as well as to approaches analyzing social differentiation with respect to concepts of middle class in the social sciences (2). This makes up the background for answering the question of whether there is one or many middle classes in the Global South (3). Based on general sociological approaches from the Global South, a first step toward a concept for capturing middle class diver-

sity in the Global South through *milieus* is presented (4). Thus the focus will be on a conceptual discussion for the analysis of middle classes. Therefore, the relation between middle class and civil society mentioned before cannot be discussed in detail. When we compare civil society and middle class, we see that both concepts are directed at seemingly the same portion of society. Civil society does overlap with middle class—yet the categories are not identical. Not all members of the civil society are part of the middle class. The classical working class in industrialized societies cannot be subsumed under *middle class*, but is rather organized through strong civil society associations: trade unions. In contrast, small community-based organizations (CBOs) in developing countries made up of subsistence farmers or landless people form part of civil society—but many members of CBOs do not belong to the middle class. At the same time, not all members of the middle class are organized into civil society organizations or support these kind of associations. A considerable part of the middle class is non-political and not active in political processes or even interested in politics. Yet when we look at civil society associations, many activists and leaders have a middle class background; this also holds true for trade

unions. Members of civil society associations often choose leaders that have a middle class background. An active civil society would hardly exist without a strong middle class.¹

The Current Debate on “Middle Class” in the Global South

The definition of *middle class* is widely discussed in development economics. The dominating criteria defining *middle class* is income and/or consumption. *Middle class* in this sense refers to socio-economic differentiation. There are two different approaches; one approach tries to identify middle classes relative to their specific countries and societies, like Birdsall, Graham, and Pettinato do. The second approach tries to capture the *middle class* at a global or continental level, and discusses their role in economic and/or political development with specific reference to their role as important (global) consumers (e.g. African Development Bank [AfDB]; Kharas; Milanovic and Yitzhaki). Easterly refers to a “middle class consensus” as an important factor in economic development. The existence of a “middle classness” is even assumed from a neo-Marxist perspective. However, this middle classness includes not only aspiration toward upward mobility and economic success, but also “anxiety and the desire for a feel-

ing of security and belonging” (Heiman, Freeman and Liechty “Introduction” 8). But despite this common middle classness, Heiman, Freeman and Liechty underline the existence of “critical differences arising from divergent histories, colonial traditions, and political-economic formations” (7).

Authors interested in a global or at least regional middle class for their definitions refer to selected poverty lines from countries of the Global North and South. The resulting definitions vary between \$2 to \$10 per day (ppp²) (Banerjee and Duflo 4), to \$2-13 (Ravallion 446), \$2-20 (AfDB 2) or even \$10-100 (Kharas 9). Those following a relative approach with a country-specific definition define the middle class in relation to the median per capita income (75-125%) (e.g. Birdsall, Graham and Pettinato 3) or as falling within the middle quintiles of income distribution (2nd, 3rd and 4th quintile [Easterly 10]). There is clearly a lack of consensus regarding a socio-economic definition of the middle class. Named thresholds have been chosen more or less arbitrarily (Ravallion 446). In some of the concepts, the middle class is divided into two or even three strata. Banerjee and Duflo define two groups (\$2-4 and \$6-10) (4) while Ravallion discusses \$2-6 and \$6-13 (448). The African Development Bank divides the scale from

\$2-20 into three strata: \$2-4 is the floating class, \$4-10 the lower-middle class, and \$10-20 the upper-middle class (2).

The size of the middle class depends on its definition. Concepts that use average income or quintiles automatically identify a *middle class* without asking whether the lives of people in that group differ clearly from that of other groups. Especially the definition via quintiles fails to capture a change in size including advancement and descent; it informs only about (changing) income levels within the quintiles. The definitions that use fixed thresholds or lines to divide the middle class from the poor and the rich are much better in capturing changes and up- or downward movements. The upper limit of \$10 (Banerjee and Duflo 4), \$13 (Ravallion 446), or even \$20 (AfDB 2) per day per capita seems at a first glance to be quite low. But this does capture large parts of societies in the Global South. The \$0-20 line includes ninety-seven percent of the population of the Global South (data for 2010).³ Besides different socio-economic definitions of the middle class, authors agree that there is a growing middle class with a large demand for a variety of goods. It is this purchasing power that leads to identification of middle classes as drivers of global economic demand with influence on global economic development (for a

critique of this position see Melber). This growth is mainly propelled by the rise of middle classes in developing countries, where a considerable group advances out of poverty and joins the middle class. But a large part of this group continues in an insecure position, with still-limited possibilities of consumption. The term “floating class” used by the African Development Bank for the lowest stratum of the middle class (\$2-4) describes quite well their position just above the poverty line, but still in a precarious state.⁴ Yet they do have some means, which they use for investment in education, health, or small businesses (Banerjee and Duflo 9,18).

Identification of a socio-economically defined middle class has no direct implication for political processes. The middle class may be conservative to protect its minor privileges, or it may under different circumstances be political active and push for change (Darbon 51; Heiman, Freeman and Liechty, “Introduction” 11). This openness regarding differing political positions can be observed in current Middle East political processes or in processes of democratization in Africa and South America. We have observed since the 1990s that the middle class is nurturing competing political groups.⁵ This leads to the question of whether social sciences perhaps offer more differenti-

ated concepts for the analysis of middle classes.

Sociological Concepts of “Middle Class”

The idea that a particular *class* shares a common political orientation goes back to Karl Marx’s “class analysis.” Karl Marx identifies classes based on the ownership of the means of production, which constitutes a common class interest. For him, capitalist societies are marked by two dominating classes; on the one hand the “capitalist” or “bourgeois” class that owns the capital, and on the other hand the working class that controls the means of labor. Middle classes played a minor role in this concept, as they were seen as “petty-bourgeoisie” and therefore as a supplement to the “bourgeois class.”

A further step was made by Max Weber, who not only identified more classes, but also extended his analysis to include socio-cultural differences presented by social ranks with different patterns of livelihood and particular values (Weber 177-80, 531-40). This combination of socio-economic and socio-cultural elements is at the core of the more recent concept of “class analysis” that has been presented by Bourdieu. Like Marx, he speaks of a “bourgeoisie” and a “working class,” but underlines that to be part of a certain “class”—especially that of the “bourgeoisie”—one needs

to have access to different forms of capital: economic capital, cultural capital, and social capital. According to Bourdieu, members of a particular *class* have a certain way of behavior, a specific *habitus*. This link between class and socio-cultural backgrounds is captured by his concept of *milieu*. Therefore, each class represents also a particular socio-cultural *milieu*. The important point in Bourdieu's analysis is that socio-cultural differentiation follows socio-economic differentiation.⁶

In sociology after World War II, the term *class* received a different twist. Whereas in Marxist and neo-Marxist (e.g. Bourdieu) concepts *class* was a theoretically grounded concept related to control over means of production, in descriptive studies of social structure *class* is understood as "a particular socio-economic stratum defined by professional position, education, and income." The three criteria are linked to each other, but not in deterministic way. All these concepts imply that social position is more or less directly linked to socio-economic position and influences consciousness and/or values and attitudes.⁷

Differences between rural and urban settings are also considered in the more elaborate concepts of social structure. The discussion is of particular social conditions or livelihoods. This includes differing access to technical and social infrastructure

in rural and urban settings—ranging for instance from access to health services, to education, or to transport (Hradil, 144-57). Aside from these particularities, the debate still uses the term *middle class* in a way that implies the existence of a more or less homogeneous class or stratum.

More recent studies in the USA and Europe create doubts as to existence of "the" middle class. In addition to socio-economic strata defined by income, professional position, and education, these studies examine values on the scales of tradition/modernization and individualization/re-orientation to identify different *milieus* characterized by the combination of socio-economic position and values. Values are mainly reflected by consumption patterns and viewed as part of a shared lifeworld, conceptualized as social *milieus*. Social *milieus* are seen "as sub-cultural entities within a society that capture people with a similar view of life and way of life" (Flaig, Meyer and Ueltzhöffer 55, translated by Dieter Neubert). These *milieus* became important for market research, like the widely used Sinus *Milieus* (see figure 1).

In this concept, the value orientation in a certain socio-economic strata may vary and some of the *milieus* cut across socio-economic strata. These *milieus* are differ-

ent from the *milieus* in Bourdieu's theory. Whereas Bourdieu's *milieus* are linked to a certain class in the Marxist sense, this approach highlights the fact that "value orientation" may vary even under the same socio-economic conditions and also for people with similar education and professional position. At the same time, the socio-economic position remains significant. Economic means define the possibilities of consumption. But the way these possibilities are used varies. Membership to a certain *milieu* is thus the result of individual decisions and not determined by socio-economic position or socio-economic background.

The Sinus *Milieus* are only one prominent example for a range of studies in a similar line of thought. However, these studies use various criteria for definition of *milieus*, and hence identify different *milieus* (e.g. Vester; Schulze; for a recent overview see also Rössel and Otte). A similar study on US lifestyles (Mitchell) identifies nine different lifestyles and emphasizes that these may be found in similar socio-economic conditions. This has also been applied to European countries (Mitchell 174-96). However, the lifestyles are organized into a kind of hierarchy of ascending psychological maturity (Mitchell 26-27, 31-32).

The study of such lifestyles and milieus reached its height in the 1990s. Besides providing insights, these studies also faced limitations. To the present day, a sound theoretical grounding for construction of different milieus or lifestyles is lacking, and the concepts based on Bourdieu's theory are not flexible enough to capture true empirical diversity. Typologies of milieus or lifestyles developed in different studies overlap, but do not match up for comparison. It is questioned whether the values orientations behind the lifestyles are rather linked to social action (Hermann; Otte). Whether this theoretical gap can be closed remains an open question. The strength of these studies lies in an awareness of and empirical access to the plurality of socio-cultural distinctions at a social structure level. Milieu approaches show that simple socio-economic categories are unable to capture the socio-cultural diversity of social structure. Their empirical usefulness, however, represents one important reason that these concepts continue to be used intensively by market research.

The question of socio-cultural difference has also been researched through an ethnographic approach with a focus on the individual subject (subject-centered milieu research, Rebstein and Schnettler 53-

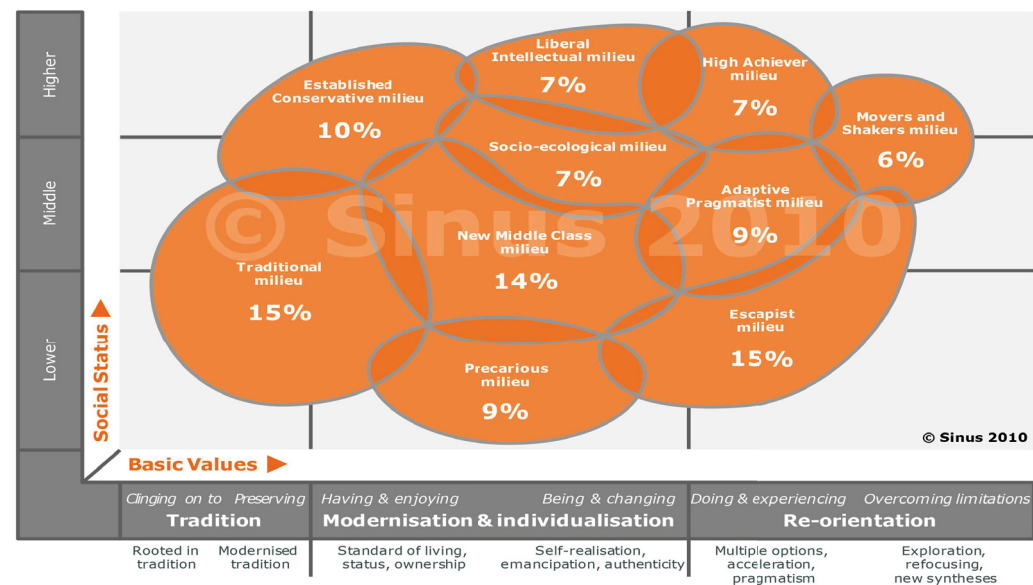


Figure 1: Sinus Milieus in Germany 2011

Source: Chart. *Sinus Milieus in Germany 2011*. Sinus Markt und Sozialforschung GmbH. Heidelberg: Sinus Institut, 2011. Web. 14 Feb 2014 <http://www.sinus-institut.de/fileadmin/dokumente/Infobereich_fuer_Studierende/Kartoffel_Studentenversion_2010_engl.jpg>

55). The topic is so-called “micromilieus,” or “small lifeworlds,” like a football club or a small neighborhood (Zifonun and Cindark, “Segregation”; Zifonun, “Integration”). These small lifeworlds are only part-time, and people may participate in different, small lifeworlds that even have contradicting values and norms. Whereas the Sinus Milieus approach points to general socio-cultural differences in society as a whole and describes general social structure, the subject-centered approach of small lifeworlds focuses on differences

at the level of the individual (Rebstein and Schnettler 56).⁸

One vs. Many “Middle Classes” in the Global South

Against the backdrop of this general debate, since the 1960s a number of attempts have been made to analyze the positioning and role of the middle class, trying to reflect the specific situation in the Global South. In many of these countries, the working class was small or even non-existent. Classical Marxist analysis

was not able to capture this. In a post-colonial setting, the state was not only the primary political actor, but also the carrier of economic development—as provider of infrastructure, as entrepreneur, and as recipient of development aid. The state also controlled the private sector via licensing, price controls, and export and import regulations. This offered those in control of the state access to state resources.

This led to the introduction of the concept of *state class*, which included political elites, and higher- and mid-level administrative staff who profited from and controlled state resources (Elsenhans, *Staatsklassen*). Members of the state class not only earned their salaries, they also received extra payments and favors from the private sector and used their influence to gain access to profitable licences and other economic activities. The state became the main source of income and economic control. Whereas top politicians comprised a small part of the elite, mid-level staff represented a considerable part of a still-small middle class. Other middle class members, such as small- and medium-sized landowners and owners of small- and medium-sized enterprises, were mostly ignored or seen as *petty bourgeoisie*. Employees of the formal sector were defined as working class.

German sociologist Berg-Schlosser presented a detailed analysis of Kenya's social structure in the 1970s using two dimensions. The first was control over the means of production (in the Marxist sense) through private landownership, private capital, economic control over means of production (e.g. management), or political control. The second dimension referred to the main source of income: capital, capital and labor, labor, or no regular income. This led to an elaborated structure involving large landowners, capitalists, managers, and a state class living off of capital or control over capital at the upper end of the society. In this scheme, the middle class (or petty bourgeoisie) lives off capital and labor on self-owned farms as agrarian bourgeoisie, through enterprises as non-agrarian bourgeoisie, or as mid-level, white-collar employees ("salaried"). The working class lives off labor as proletarians or as quasi-proletarians ("proletaroids"); these are agrarian "proletaroids" (smallholders) and non-agrarian, self-employed "proletaroids" (small and micro-entrepreneurs). At the lowest level of society, those without regular income form a sub-proletariat (Berg-Schlosser 315-18).

This type of analysis (Elsenhans; Berg-Schlosser) focuses on the similarities of *class* and implies more or less clearly sep-

arated classes (or groups). But it ignores that many families at all levels of society combine various sources of income as state employees, owners of land and enterprises, and employment in formal non-enterprises (Neubert, "Kulturelle Differenz" 182; Smith, Wallerstein and Evers). The more recent publication "The Global Middle Classes" (Heiman, Freeman and Liechty) follows a neo-Marxist line of thought and attributes recent growth of the "new" middle classes to changing modes of production (with a new international division of labor) and to the possibilities and capitalistic necessities of mass consumption in neo-liberal capitalism. These "new" middle classes then join the "traditional" middle classes that emerged together with state-driven development in the Global South (Heiman, Freeman and Liechty, "Introduction" 12), or *state-class* in Elsenhans' terms.

The concept of *strategic groups* tried to analyze processes of socio-political change in developing countries and referred loosely to Marxist class analysis (Evers and Schiel). *Strategic groups* are groups that base their existence upon access to a certain set of resources, e.g. economic, ideological, or religious. According to this concept, social change is driven not by a certain *class*, but rather by social groups that share access to useful

resources, which might include people from different economic strata.

The idea of strategic groups reminds us that socio-political coalitions can be formed across different socio-economic substrata. When we look closer at societies of the Global South, socio-cultural differences become apparent. They are neither determined by socio-economic position, nor by the political economy. The most obvious cultural differences are marked by religion or ethnicity, which often cut across socio-economic strata and represent important means of political mobilization. Examples are conflicts between different religious and/or ethnic groups, e.g. in Lebanon (Christian, Druze, Shi'ite) or Iraq (Sunnite, Shi'ite, Kurd), ethnic-religious parties in Mauritius, or between the Islamic north and the Christian south in Nigeria, or political mobilization along lines of ethnicity e.g. in Kenya, Zimbabwe or Zambia. Ethnicity and religion play a role in the socio-cultural diversity of middle class in any given country. Therefore, the idea of a global middle class must be challenged. Even if we can identify a growing group in the socio-economic strata of the middle class with an interest in the same consumer goods, their lifestyles could differ considerably.

And if a national power struggle is organized along ethnic or religious lines, it is

not a given that ethnic and/or religious factions share the same values. For example, only a minority of Nigerian Muslims supports the radical Boko Haram movement. And in Kenya, the debate on a new constitution in 2010 focused on the question of whether abortion should be allowed in special cases, or should remain forbidden. Churches and ethnic traditionalists contested this (limited) right to abortion. Women's rights activists, supported by liberal-minded sectors of civil society, supported the new regulation. Both camps cut across ethnic and religious lines (Daniel and Neubert). This strongly implicates further value differences behind general patterns of political mobilization. For instance in Kenya, a group of young professionals has been identified that shares relatively liberal norms of sexuality, altered gender roles, and a certain distance from traditional family values (Spronk). These young professionals are part of the (upper) middle class; yet the majority of that socio-economic stratum adheres to traditional sexuality and family values. Another example are the sapeurs of the Republic of Congo (Brandstetter; Friedman 157). This is a group of young males likely belonging to the lower middle class, who spend most of their money on high-fashion, designer clothes (often second-hand, but still quite expensive)

seeming to be well beyond their financial means. To live this lifestyle, they have to abstain from consumption of other goods and amenities. This group is only a small fraction of the lower-middle class, the majority of which is struggling to assure survival of their family and educate their children. These two extreme examples demonstrate how different lifestyles are present in the same economic strata. The important point is that differences in lifestyle and values neither follow strictly ethnic or religious cleavages, nor socio-economic divisions.⁹

Towards Concepts That Capture Middle Class Diversity in the Global South

The question is now: How can we make use of existing conceptual and theoretical debates to capture current social changes and emerging differences in lifestyle and values in the Global South? A simple application is hardly possible; not only due to differing levels of consumption, but also because of cultural diversity. However, we may use concepts developed in Europe and other parts of the world as a kind of inspiration to examine differences in lifestyle or at the level of milieus that do not equate to simple socio-economic differences. Until now, hardly any empirical studies on diversification of milieus in countries of the Global South exist.¹⁰

Based on still unsystematic knowledge from a recently started study on Kenya¹¹, some first examples of how these milieus might look like may be proposed (Stoll and Neubert):

- ◆ The *milieu of young urban professionals* (already described by Spronk), marked by individual career orientation, late marriage, single households, partying as leisure, stylish clothing, importance of city life, weak ties to countryside, and being ethnically mixed.
- ◆ A *religious milieu* oriented toward religious norms, family values, leisure time as family time, abstaining from alcohol and partying, hard-working, oriented toward economic and professional success and upward social mobility.
- ◆ A *neo-traditional milieu* marked by ethnic identity and “traditional” values, strong ties to their (rural) place of origin, importance of rural landownership, ethnically homogenous social networks.
- ◆ A *milieu of those struggling* not to fall back into poverty, with the family held in high regard and oriented toward

access to decent employment in spite of challenges and setbacks.

This short sketch provides an idea of how milieus in Kenya might be described. But this preliminary structure of milieus is a work in progress and not at all comprehensive. In addition, it must be kept in mind that milieus often differ between different countries. For a proper analysis, we need empirical data upon which to base systematic criteria to describe milieu differences. As a starting point, it is possible to use already existing milieu concepts.

The basic advantage of the Sinus concept of milieus is its scale from traditional to modern, and individualization to re-orientation. However, this is far too general to be applied in the different cultural context of Kenya, or in any other country of the Global South. Therefore, this comprehensive scale as well has to be deconstructed. A return must be made to the original building blocks employed in developing the scale, which were different clusters of values and lifestyle such as aim in life, social conditions, work/performance, concept of society, family and partnerships, leisure time, general orientation, and ideals (Flaig, Meyer and Ueltzhöffer 71, translated by Dieter Neubert).

A second approach to apply milieu analysis to the Global South references the

world value survey applied not only in the Global North, but also in the Global South.¹² In the world value survey, two different scales are used to capture value differences. The first dimension goes from traditional to secular-rational values (equivalent to the traditional/modern and individualization/re-orientation scales of the Sinus Milieus). The second dimension captures materialist/post-materialist values, and reaches from survival (over well-being) to self-expression (Inglehart and Welzel, “Changing Mass Priorities” 554; Inglehart, *Modernization*). In an international comparison, this division shows that post-materialist values gain importance once survival and well-being are secured (Inglehart and Welzel “Changing Mass Priorities” 554). At the same time, the two-dimensional model helps in analysis of whether or under what circumstances post-materialist values play a role.¹³

When wanting to capture the particularities of different Global South societies, these concepts must be developed further. The already mentioned examples of the young, unmarried sapeurs of Congo, and the young and childless yuppies of Nairobi, point to the fact that some of the lifestyles of milieus are restricted to certain phases of a lifecycle. We may assume that those who establish a family with children change their lifestyle. (Similar changes in the life-

cycle are known for Germany.) At the same time, some lifestyles need a certain purchasing power for their performance. These lifestyles may be present as a kind of aspiration, but not as a current practice.

One option to addressing changes over a lifetime is to include questions on individual value changes e.g. concerning consumption, leisure or morals in the past, and expected changes in the future. Not only future aspirations are covered by these expected changes, but also more generally attitudes towards career and family values as well as actual behavior, such as investment in further education, financial saving for old age, investment in housing, etc. In addition, future aspirations also help to identify the existence of “post-materialist” values (in the sense of Inglehart). Inclusion of the dimension of time with reference to past and the future aspirations also helps to capture individual social mobility and the social dynamics triggered by radical social change.

The dimension “traditional to secular-rational values” in the world value survey and the Sinus dimensions “traditional/modernization and individualization/re-orientation” include values referring to the political system. In the Sinus concept, direct implications to preferences concerning political parties are made (Flaig, Meyer

and Ueltzhöffer 144), while in the world value survey traditional authority is opposed to rational legal authority (Inglehart, *Modernization* 345). Even when liberal democracy remains unmentioned directly, both concepts imply its close links to a rational-legal authority. But the reality of political movements in the Global South is more complicated. The authoritarian regimes of the Middle East that were contested or even deposed in the Arab Spring claim(ed) a legal authority based on a “modern” rationality. At least a part of the opposition groups combined a claim for democracy with religious concepts. In some African countries, democracy is combined with jurisdiction of traditional authorities, such as chiefs or councils of elders (e.g. Ghana, South Africa, Namibia, Uganda). And in Libya, a strong faction claims an influential role of sheikhs in the new political system, and refers at the same time to democracy. In these examples, we can observe competition among different socio-political models such as democratic liberalism, authoritarian patriarchy, neo-traditionalism, theocracy; and at least in Latin America, socialism (Neubert, *Competing Orders*, see also Klute and Embaló). They cannot be captured by a simple dichotomy between “traditional-authoritarian” and “modern-democratic.”

In addition, not only the ongoing conflicts in the Middle East, but also conflicts in other regions underline that these models have supporters across various socio-economic strata. At the time, in many cases the leaders of the conflicting groups originate in the middle class.¹⁴

Another peculiarity of the Global South has to be considered. Due to high spatial mobility across borders and continents (as labor migration and/or migration for education), a considerable part of the population has experienced living abroad or has at least linkages to the diaspora. Milieus may thus reach across borders and continents.

Finally, we have to be aware that we cannot take the existence of more-or-less separated milieus for granted. Application of the socio-structural milieu concept implies that people can be situated in a certain milieu that captures the primary elements of their value orientations and lifestyle, at least for a certain phase of their life. But the previously mentioned subject-centered milieu analysis of part-time lifeworlds offers another interpretation. People may simultaneously belong to different part-time lifeworlds with different value orientations, without a clear preference for any one milieu. In the end, deciding whether socio-cultural and socio-economic differentiation can be captured better

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by “large scale milieus” or “part-time milieus,” or by a combination of both concepts, remains an empirical question.

Conclusions

The current interest in the debate on *middle class* directly demonstrates the limits of our knowledge. We are merely at the beginning of interest in middle class(es) of Global South countries. But the notion of class is misleading. Patterns of consumption and lifestyle differ within a class, and in the political realm we observe competition among different groupings, each with their own particular political, cultural, and

social attitudes. These variances are not simply determined by socio-economic differences, or ethnic and religious attachments—nor are they completely independent from this background. Analysis of the interplay between socio-economic position, lifestyles, and differing religious and ethnic belonging—and analysis of the resulting more-or-less stable groups—is an empirical and conceptual task. The concept of *milieu* that has been presented here is one attempt to capture socio-economic along with socio-cultural differences. It promises a better understanding of the growing societal plurality

of the Global South than application of a class concept. However, every study on milieus should be aware of shortcomings, such as limited theoretical grounding and a certain fuzziness on definition of the different milieus leading to differing descriptions of the same society, depending on criteria used, in the countries of the Global North. Regardless, comparing limited knowledge on societies in the Global South through the identification of milieus supports a more sophisticated discussion that prevails over the simple concept of socio-economic class.

Notes

¹ This topic needs more attention. Examples for this kind of study referring to the Middle East are Clark and Nasr.

² PPP means “purchasing power parity” and puts per-capita income in relation to country-specific costs of living.

³ Calculated with World Bank data: <<http://iresearch.worldbank.org/PovcalNet/index.htm?>>

⁴ However, also members of higher strata of the middle class may fall back to poverty when they lose their source of income because social security is very limited.

⁵ For an overview on Africa see Neubert (“Competing Orders”).

⁶ The notion of different forms of capital has been applied in development studies including the concept of livelihood analysis without reference to Bourdieu’s theory. This concept was mainly used to analyze the situation of poor people and not the middle class (Carney).

⁷ At least in the German debate, the use of the term *strata* refers to this kind of descriptive concept, in contrast to the Marxist *class* concept.

⁸ For an overview on concepts of *milieu* see Zifonun (forthcoming).

⁹ Of course there are many more ethnographic studies on middle-class lifestyles. But in many cases, a certain socio-economic or ethnic homogeneity is implied (e.g. Freeman; Oppong; Stichter; Srivastava).

¹⁰ There are ethnographic studies on consumption (e.g. Friedman; Hahn; Hendrickson; Prestholdt), but they focus on selected groups.

¹¹ The study “Middle Classes on the Rise” conducted by Erdmute Alber, Lena Kroecker, Dieter Neubert and Florian Stoll is part of the project “Future Africa. Visions in Time,” supported by the German Ministry for Science and Education.

¹² Even when the world value survey is used to compare value differences at the level of different countries and not for intra-country differences, we may refer to its categories.

¹³ For example, parts of the Indian middle class positions itself against materialist values (Fadae, in preparation).

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→ ¹⁴ Important data on political attitudes can be obtained by Afrobarometer <<http://www.afrobarometer.org/>>, Asianbarometer <<http://www.asianbarometer.org/>>, Arabbarometer <<http://www.arabbarometer.org/>> or Americas Barometer <<http://www.vanderbilt.edu/lapop/index.php>>.

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