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Double Whammy for the Middle Class

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ABSTRACT

The main thrust of the paper could be brought down to the thesis that the concept of middle class is an oxymoron. This is the case because there is a contradiction between the associations pertaining to the adjective part of the term in question and those pertinent to its noun part. "The middle" is a hierarchical term, which fits social stratification rather than class, as class relations generally have a more complex character. The said confusion matters because of some important weaknesses of stratification approaches.

Introduction

The thesis about the demise, if not outright death of the American middle class has come to constitute kind of conventional wisdom. But apart from the processes in the real world one can explore some salient aspects of the concept in question, which-to anticipate what follows-will sort of put to death the latter, deconstructing it to the point of extinction. For the sake of parsimony, WE SHALL NOT DWELL ON the aformentioned shrinkage or demise of the U.S. middle class. This does not mean that no judgment regarding the validity of that claim will be passed. The next section shows that there is much more than meets the eye as far as the household term in question is concerned.

The "Leaping" Concept

Quite a few authors "argue that a new economy […] soon became unaffordable to 'decent' salaried people (teachers, engineers and technicians, small shopkeepers), [...] once exemplars of successful jumps into middle class status but now doubly exiled to the suburbs and to the older pattern of struggling to get ahead by taking on two or three 'demeaning' jobs" (Lanoui et al. 2011). The thing is, The thing is, the category of "salaried people", as defined above, is an over-inclusive one; first, it includes the class of private owners, whose income cannot be classified as a salary. Second, however, and perhaps less apparent, the concept in question is too broad also by virtue of putting in one bag groups functioning in the economy (i.e. socio-economic classes) and those, such as teachers, whose jobs are non-economic in nature (which can be captured by the term "social estates, borrowed from Weber-and, by the way, customarily mistranslated as "status groups").

Likewise, the following purported instance of the class under examination represents in fact a mix of class and estate locations: "Berea resident Phyllis Price says she could bring something to the U.S. Senate that incumbent Mitch McConnell could not: 57 years of middle-class living and experience living on a fixed income. […] She has worked at the Internal Revenue Service as a data transcriber and formerly owned a private income tax business. She also has worked as a teacher's assistant" (Littrell 2013).

To concentrate on the aspect of over-inclusiveness, however, in the following definition it clearly stems from the latter's common-sense character: " Whether you earn just enough to feed and clothe your family, or have something to spare to buy non-necessities, the thing that unites the lower middle, middle and upper middle classes" (2013), states the author, without delving into the nature of that purported common denominator.

Income data presented below obviously provide a key type of evidence in an investigation of what is argued to constitute a social stratum rather than class. On the basis of those data rather far-ranging conclusions are being drawn, so the quality of the data is obviously a crucial issue. Meanwhile, as the following passage shows, the former is not guaranteed at all; conversely, their construction may well suffer from the fallacy named in the head. The researcher in question criticises the much trumpeted about study, pointing out that " the income concentration estimates compiled by Piketty with his colleague Emmanuel Saez cannot be used to assess how the middle class has done over time. Incomes have risen strongly after taxes and federal benefits are taken into account and other improvements to the Piketty numbers are factored in. But I also showed that middle-class incomes have risen robustly among the working-age population before taking higher federal benefits and lower taxes into account.

Astonishingly, the latter result has been systematically ignored by a number of writers and researchers responding to my column. Most prominently, Jared Bernstein (in a response posted at the New York Times Upshot website) and Piketty himself (in an interview with The New Republic) claimed that middle class incomes have risen only because of government benefits and lower taxes. [...] rather than addressing the evidence I presented (or rather, presented again), Bernstein, Piketty, and others are simply ignoring it in their responses to my critique.

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By citing estimates that do not separate out the working and non-working populations, they obscure the strong gains in earnings that have accrued to working-age households.

You don't have to look far to see this—you can scroll a few tabs over in the spreadsheet Bernstein uses. Bernstein turns not to Piketty's data but to related estimates—I would say better ones for recent decades—from the Congressional Budget Office. CBO statistically matches people in the Department of Commerce's Current Population Survey to tax returns in the IRS data used by Piketty, thereby attempting to leverage the strengths of both data sources. Bernstein notes that post-tax and -transfer household income for the middle fifth of Americans rose 36 percent from 1979 to 2010 before reassuring his audience that 90 percent of that increase came from transfers and lower taxes. Household wage and salary income declined by seven percent.

But the figures he is citing, like those of Piketty, combine retirees and members of working-age households. Retirees have lower pre-tax and –transfer incomes than everyone else, concentrated in—you guessed it—retirement benefits. More importantly, with the aging of the baby boomers, retirees have been a growing fraction of the middle class. Since Bernstein includes a rising share of non-working Social-Security-and-Medicare-receiving people in his trend analyses, it should come as no surprise to find that earnings growth was less important than the growth of transfers over the period"(Winship 2014).

The point is that the above-mentioned transfers imply a position in the structure of ownership relations very different from that held by the wage-earners. The beneficiaries of the former constitute a social estate, rather than a class.

It is necessary, we believe, to keep in mind that caveat when reading such revelations as one cited below:"rather than constituting 91 percent of income growth, taxes and transfers only account for 54 percent of income growth among nonelderly households. The growth of elderly households is the entire reason that wages and salaries detracted from income growth and that taxes and transfers accounted for nearly all of the growth. People in such households grew from 15 percent of all people in the middle fifth in 1979 to 26 percent of them in 2010. It is not just that the retiree population has grown—thanks to Social Security and Medicare, the number of retirees in the middle fifth specifically has grown much faster than their rate of growth in the general population.

Wages and salaries are the single biggest factor explaining income growth for those middle class families living in households with children. Wages and salaries are nearly as important for childless nonelderly households. The fact that when the two nonelderly groups are combined wage and salary growth looks less important than it does in either group individually is an instance of Simpson's Paradox. The paradox is explained by the fact that among the nonelderly middle class, people in childless households became a much bigger group relative to those in households with children.

It is not entirely clear how to interpret the paradox. One possibility is that households with children that are also in the middle class are a more advantaged group today than in the past, in which case looking at their changes overstates the importance of earnings growth to overall income growth.

The greater dependence on wages and salaries and lower dependence on transfers and taxes would reflect the fact that only higher-earning parents make it to the middle class today, which now includes more retirees and other childless households.

However, among the nonelderly, childless households have lower incomes than households with children, in part because they have fewer earners. Therefore, pooling nonelderly households may understate the importance of earnings growth because the group with fewer earners has grown so much bigger over time. The ideal way to deal with this is to adjust incomes for the number of household members before computing averages and looking at changes in those averages.

However, while CBO determines who is in the middle fifth of households on the basis of size-adjusted household income, it then reports income averages that are not adjusted for household size.

A second issue is that older "nonelderly" households may be headed by a fully or semi-retired head. Workers become eligible for partial Social Security benefits at age 62, and private retirement savings can generally be tapped without tax penalties before age 60. The reliance on Social Security among retirees may be behind the greater importance of transfers among childless nonelderly households than among households with children. In addition, CBO puts households that have children but that also have an elderly head in this "nonelderly childless" group, further expanding the presence of retirees in the group.[...] let's consider what the increases in wage and salary income look like, along with gains in a broader measure of labor income that includes worker contributions to 401k-type retirement plans, employer provided health insurance, and the employer's share of payroll taxes (which is viewed by CBO and most economists as income received by workers that is then taxed away to pay for social insurance benefits). I also show the change in pre-tax and -transfer income, which includes other private sources such as business, capital, and retirement income.

Middle class households with children had earnings $7,000 to $13,000 higher in 2010 than in 1979 (after accounting for the rise in the cost of living), a gain of 14 to 23 percent. If one adds other forms of pre-tax and -transfer income, the increase was over $15,000, or 25 percent. Childless nonelderly households also saw significant gains in pre-tax and -transfer income ($8,000, or 20 percent). The gains for nonelderly households as a whole are smaller than for either group individually—a clear sign that grouping childless households and those with children understates improvement if incomes are not adjusted for household size. Only elderly households in the middle class saw declines in earnings and pre-tax and -transfer income. Don't cry for them, though—their after-tax and -transfer income rose by 45 percent.

Overall, "that's a $21,000 increase in household income among middle-class families with children before taking transfers or taxes into account. It's a $13,000 increase for childless nonelderly households. Seniors experienced declines. Good thing Social Security and Medicare were enough to raise their after-tax and -transfer incomes by 48 percent (not shown).

Among both nonelderly groups, household income grew by about one-third—without any consideration of federal benefits or taxes. In fact, labor income also grew by about one-third among the nonelderly groups individually. Even if you are inclined to prefer the nonelderly figures when the two groups are pooled, we are talking about a $10,000 increase in earnings broadly defined" (Winship 2014). The above argument shows that a flawed conceptual framework can lead to serious statistical distortions.

Polish philosopher of science, Leon Petrazycki, coined the term "leaping concept" to refer precisely to such concepts whose meaning is extended beyond what the name itself suggests.

A good illustration is provided by both the aforementioned figure cited by "The Economist" and an over-extension of a common definition: "economists often start with the middle 20% of the country – people earning between $39,000 and $63,000 a year – and work their way out. Some then stretch the definition to include the middle 60%, which has an income range of $20,600 to $102,000. Because that's a wide range, other factors come into play: home ownership, savings, a college education. I would say those on the lower end of the spectrum are dangerously close to being 'poor', since the poverty line for a family of three is just shy of $20K" (Wright 2013).

Presumably, then, one of the above-named factors has been tacitly (and rather arbitrarily)picked by " the middle class was almost entirely destroyed by the financial crisis given many had their net worth heavily linked to the value of their homes. In other words, there is an argument to be made the middle class no longer exists anyway" (Wright 2014).

However, this does not prevent other researchers from repeating the same kind of error as one reported above. In Robert Reich's view, "the middle class income range should be 50 percent higher and lower than the median" (McDill 2014), which would-as of 2012-put the range between $25,000 and $76,500" (2014).

This has elicited such a reaction

"But anyone making $25,000 annually would struggle to declare themselves as 'middle class'" (McDill 2014). It is worth mentioning that Department of Health and Human Services defines a family of four living off $23,850 as poor.

In one commentator's opinion, "the middle 50 percent of the range Reich offered would be between $40,000 and $64,000 annually, which probably has a better meaning as the middle class income range" (McDill 2014).

Symetrically, however, the other end of the spectrum can be pushed unrealistically high; Republican presidential candidate Mitt Romney set the upper-end figure for middle class membership at a household income of $250,000 a year,[1] which, sure enough, in great measure expresses his political views. President Barack Obama, whose ideology is rather different, set the bar lower, if only a little-at $200,000. indeed in some pronouncements that crucial step has been made, as e.g. with the author who in one breath mentions the middle class, the poor and the working classs. (Surmick 2014)Such confusion is only possible because the term we are focusing in is itself confusing.[2] However, those numbers are miles apart from the median – (arguably, the most widely used metric in that context) or "middle – household income in America, which the Census Bureau reported to be about $50,000 in 2011. The top 5 percent of American households had incomes of $186,000 or more" (pbs.org 2012), meaning that many of them would still qualify as "middle class" under the candidates' definitions, which seems absurd. It comes as no surprise that the local commentator could not disagree more: "Actual income levels around the country make both of those figures high" (Tims 2013). in point of fact, this could be deemed an understatement, as the aforementioned figures imply that 96 percent of Americans are middle-class. With this kind of definition, nothing could be more straightforward than joining the elite club of rapidly growing economies, at least according to Easterly (2001, who contends) that countries that have a larger middle class tend to grow faster, at least if they are not too ethnically diverse (the little word "too" suggests iin what way the impact of that factor can be minimised)." .

A case in point is provided by Indonesia; Andrew Robb, Australia's Minister for Trade and Investment recently argued, "Indonesia has a middle class twice the size of Australia's population" (Conley 2013).

However, it is safe to say that the equation of Indonesia's "middle class" with Australia's population is profoundly misleading. The middle classes of Indonesia and other developing countries are in fact quite different animals than the entity described by that term in the West, putting aside-for the sake of argument-at the moment the ambiguity of the latter. Thus, the former "classes" do not match the consumption capacity of developed country middle classes or even those one would consider poor.

True, Indonesia's economy has grown rapidly in recent years. Measured in US dollars, Indonesia's GDP is smaller than Australia's, although in terms of purchasing power parity it is slightly larger. In 2012, Indonesia's GDP per capita was $3,592 (USD) or $4,977 (in Purchasing Power Parity (PPP) International dollars). Australia's GDP per capita was US$67,643 (or $42,640 PPP). Most tellingly, Indonesia is ranked 121st on the World Bank's Human Development Index (based on life expectancy, education, and income). Australia ranks second.

It is owing to taking notice of such wildly disparate measures and definitions, and thereby unfounded claims built on their basis that some commentators tend to voice some serious reservations about the usefulness of the term in question: " When the same term is used to describe an American household bringing in up to $100,000 per year (according to a recent poll; $250,000 if you're Mitt Romney) and Laotians living on $2 per day (according to the Asian Development Bank), it may not be a very useful term" (Keating 2014). And the list of such over-inclusive definitions could be extended; e.g., the reader is told that "middle class is by far the largest constituent of the Indian society: top two per cent are way above the rest, the bottom 30 per cent struggle for two meals a day. Everybody in between is the middle class" (Ghalib 2014).

[11] Which, though, could be compared with the title of the report presenting the 2013 tax legislation: "$449,999 A Year Is The New Middle Class" (Wright 2013). How come? "Despite the median income for most American households being roughly $50,000, the top tax rate for households subject to the 39.6% rate is cut off at $450,000 while the median income for most individual Americans is roughly $26,000,the top tax rate for individuals subject to the 39.6% rate is cut off at $400,000" (Wright 2013). To be fair, however, recall that under Obama, the top income tax rate, that had gone from 92 percent under Eisenhower to 36 percent under Bush, was increased to 39.6 percent. Still, this does not alter the pessimistic conclusion: "America will remain a distorted society with severe inequality" (Wright 2013), to which we could add that the prerequisite of making any dent in that inequality is an adequate knowledge about social differentiation to which the dominant conceptual framework is not conducive at all, as will be clarified later.

[2] Specifically, „Romney defined the middle class as "$200,000 to $250,000 and less;" a similar definition to President Obama's, which simply names all middle class people as those making less than $250,000" (pbs.org 2012).

Upon scrutiny this at first glance overblown concept appears to be sort of misnomer, referring in fact to a determinate socio-economic grouping that is to be couched in quite different terms, though, than its above label suggests.

The beginning of the argument put forward by the Indian researcher confirms our above observacion insofar as he is referring to "one class", whose purported monopoly status cannot but be based on its numbers. "within the so-called one class, there has been marked segmentation with sociologists throwing in terms like upper middle class, middle-middle and lower middle class, each term pointing to a level of aspiration and a state of achievement. In the centuries gone by, it was easier to recognise the middle segment: the Vaisyas, the trading community, provided the bulwark".

Interestingly, the Indian author sees no contradiction between the above description of a differentiated grouping and the claim that "Middle class is now a homogenous identity" (Galib 2014 The middle class is the largest part of the country Given an internal diversity of the category under consideration, the author of the following query hits the nail in the head: "Quibbling over different nomenclatures is meaningful if only one understands some very similar problems. Can policy have a one-size fit-all approach to the middle-class?" (Moulding 2014).
While in the above cases the obvious exaggeration was concerned with a single country, the next instance of figures plucked out of thin air concerns the world at large: “It’s estimated that 30 % of the world’s population are middle class and in the next few decades this figure could climb to 60%” (Salt 2013). Everybody loves the middle class. President Obama mentioned it a half-dozen times in his State of the Union address this year, and House Speaker John Boehner recently told Obama to "stand up for middle-class jobs." Google says it has been called the "backbone of the country" at least 2.3 million times. [...] the middle class is far and away America's favorite socio-economic group. Yet no one can agree on what, exactly, the middle class is" (Horn 2013). And this is far from being an academic problem; "decisions are made, laws are written and elections are won or lost based on people's beliefs about the middle class and what it means to the country. A nation that so values the middle class[...] really should be better at defining it.

Economists often start with the middle 20% of the country – people earning between $39,000 and $63,000 a year – and work their way out. Some then stretch the definition to include the middle 60%, which has an income range of $20,600 to $102,000. Because that's a wide range, other factors come into play: home ownership, savings, a college education. None of those calculations, however, generates a concrete description of what is – or is not – a middle-class household. One reason for the inadequate state of definitional affairs regarding the middle class is ahistoricity. "There really isn't a definition[...] The popular vision of the middle class is rooted in the 1950s, when post-war America gave birth to a generation that found solid jobs, bought houses in the suburbs and took modest family vacations.

It's still a powerful, iconic image. But whatever the middle class is today, [...] it's being tested by profound changes" (Horn 2013).

*Such an assertion is a commonplace, which fits in many different contexts. Therefore, within the debate on the class in question it is imperative to differentiate between enpirical processes and theoretical issues that both may produce similar effects. It is interesting to know, for example, that among British social scientists one can come across such critical evaluations that are related to the argument propounded in the present paper. Without using the word itself, the following criticism is levelled against the "leaping" notion of the middle class, for the specific argument goes as follows: "*If the concept of middle class is seen as a broad amalgam of professionals, managers and industrialists, and ‘petite bourgeois’ employers and own-account workers, then much of the English and Welsh countryside, and indeed much of the urban area of these countries, does appear to be dominated demographically by this class. However, as both Hoggart (1997) and Abram (1998) have suggested, albeit employing quite different lines of argument, the value of such a practice might be questioned. [...] For Hoggart the problem with the concept of middle class capture of the countryside lies with the theoretical validity of an aggregational view of the middle class which seems necessary to sustain such a perspective and also the repeated slippage within contemporary rural studies between this term and more theoretically specified concepts such as the ‘service’ or ‘new middle’ class" (Phillips 2007).

We beg to differ-it has not been explained why to study a given area one needs necessarily the notion of the midddle class, and the prise of those reputedly better middle-class offshoots has been just stated without providing any theoretical justification. This does not detract from the validity of the aformentioned researcher's warning to the effect "that such aggregation risks creating superficial descriptions of the social character of rural areas and a neglect of spatial variability". More specifically he argues that whilst areas such as the rural South East do have "rising proportions of ‘service class’ residents, this does not as yet equate to numerical domination and in many rural areas outside of South East England it is the ‘traditional middle classes’ that predominate. The analysis of NS-SEC data for the 2001 Census certainly seems to lend support to these arguments, it being revealed that whilst mapping an aggregative middle class does suggest a high middle class presence in most rural areas, analysis of particular middle class groups highlights major differences in spatial distribution, particularly with respect to constituents of the so-called service class and a traditional ‘petite bourgeois’ middle class.

At the very least this analysis, like that of Hoggart, seems to point to presence of significant variations in the employment-related social relations performed in different parts of the countryside. Whether these variations warrant ascription as class variation is clearly a more complex issue involving theoretical reflection on the meaning of class and consideration of the relative significance of work-place-based relations vis-à-vis other relations" (Phillips 2007).

The commenntator cited above does not undertake such an analysis, which to an extent will be attempted below. In a similar vein, another researcher argues that "one reason the middle-class debate is so fraught in the UK is that the phrase means very different things to different people. Is it used in the snobbish sense – sharp-elbowed, privately educated, fee-paying parents? Or is it used in the American sense – anyone neither extraordinarily rich nor experiencing grinding poverty? And it certainly isn't about private education (only 7% of schoolchildren are educated privately).

Most indicators suggest that the American definition is winning. The old definition – you are middle class if you have a 'white-collar job', paid monthly– would apply to most people working these days. So when Ed Miliband or Nick Clegg talk about the middle classes, they do so as a way of are categorising the majority of people in the UK, if not the vast majority. (Boyel 2014)

As defined by Boyle, the concept in question surely qualifies as an instance of a leaping one. And the reference to

the American context does help little, as Horn goes on to say that: Few workers today expect to finish their careers where they start. Layoffs and buyouts are now part of corporate culture. Family life is complicated by more single and working parents.

At first blush, things don't look so bad. 84% of Americans have higher family incomes than their parents did, according to Pew. Dig deeper, though, and the picture gets murky.

Many of those families have higher incomes only because both parents are now working, and Pew found that about one-third of people born into its definition of the middle class fall out of it by adulthood. [...] Insecurity plays into the national conversation about the middle class and how it should be defined. (Horn 2013) Ridiculously broad is also the notion deployed in the report from the other continent: The self-evident, it would appear, contention that "no chief executive can be expected to please everyone with his annual blueprint", (Tam 2014)does not apply in the case of Hong Kong for reasons relevant to our topic.

The reader is told that "Leung's decision this year to make taking care of the working poor his top priority was well understood. So why does it appear to have backfired? [...] it's because many of those labelled as middle class see themselves as working poor" (Tam 2014). And it is important to bear in mind that the middle class is also known as the "sandwich class" or, more relevantly, "silent majority".

The author of the article under consideration admits that "regardless of the term, the academic argument can become very political, as defining the middle class has never been an easy task. That could explain why Financial Secretary John Tsang Chun-wah was subject to ridicule when he claimed to belong to the group - despite earning HK$302,000 a month - because he enjoyed French films and coffee" (Tam 2014). Whilst it is regrettable that professional politicians should talk such nonsense, it is shameful that a professional social scientists only contributed to this confusion:

Defining the middle class is not a new headache. Back in 2003, with the city recovering after the Sars outbreak and the economy in freefall, the usually complacent middle class found themselves not only poor but "poorer than the poor"; many ran up serious mortgage debts as their homes plummeted in value, while those in public housing remained debt free.

Under tremendous pressure, then chief executive Tung Chee-hwa felt the urgent need to tackle middle-class grievances. He tasked prominent social scientist Professor Lau Siu-kai with studying the problem. Lau later confessed it was not practical to draw up an official definition of middle class, but kept suggesting the government take their needs seriously. He pointed out one stark fact: in Hong Kong, the middle class could be anyone earning from HK$20,000 to HK$2 million a month and more.(Tam 2014) Given the political context, the definition of the purported key electorate is of crucial importance, and accordingly its over-stretching can have perilous consequences: "Middle-class instability could […] lead to social friction and deepen conflicts between the government and the people. Over the years, many of those 'poorer than the poor' gradually cleared their debts. Their political views, mentality and behaviour also changed as they became more vocal, if not more radical, in making demands, both political and economic. Leung argues that far from ignoring the middle class, promoting steady economic growth, a cleaner environment and more affordable housing helps this group.

From a long-term perspective, he is right. But a remedy that takes effect so slowly might not be enough [...]The middle class, as wide as that spectrum is, is not unreasonable" (Tam 2014).

Whether this kind of over-inclusive definition could indeed be deemed reasonable, is extremely problematic, if not outright untenable. And such approaches can lead to serious distortions - on a continental and global scale, as epitomised by a romanticized image peddled by media and marketing pundits regarding an African counterpart of the category under consideration– "a group awash with disposable income and an insatiable appetite for consumption.

In 2011 the African Development Bank estimated that Africa's middle class had risen to 350 million; larger than the middle class in China, India and larger than the combined population of Canada and the United States of America. In 2013 Deloitte projected the Africa's middle class will reach 1.1 billion, 42 percent, by 2060. But who is that middle class? The African Development Bank (AfDB) defines the middle class as those spending between $2 and $20 a day. According to AfDB about 60 percent of Africa's middle class spend $2-$4 per day, subsisting just above the poverty line. Most of this group works in the informal sector. They are highly vulnerable to shocks and easily slide into poverty. The relatively stable middle class, spending more than $4 a day is about 128 million by 2010 estimates. Even assuming this liberal ADB's definition, Africa's realities act as a cold shower, necessitating a distance to the current over-enthusiasm of prospective investors. For instance a recent survey of Kenya by the polling firm Ipsos found that 93 per cent of households in the country of 42 million have monthly incomes of under Sh40,000 ($450). A Standard Bank survey of 11 sub-Saharan African countries, which together account for about half of Africa's gross domestic product, found that 86% of their households remain in the low-income band.

The classic qualitative (instead of merely quantitative)definition of middle class in the US implies the ability to fully enjoy the benefits of "modern life" - decent housing, good health care, affordable food and education, a car, public security and leisure. But few of those Africans who fit the African Development Bank's definition of middle class would argue that they enjoy such lifestyles because-as popular argument runs- middle class does not mean the same thing in Lagos as it does in New York. So-called middle-class people like teachers in Nigeria "earn 10 times less than their US counterparts. Comparable cars and decent housing are out of the reach of most teachers in Nigeria, since the cost of living in Lagos is only about 40% less than in New York City" (Wadongo2014).

Arguably, at the very least, middle class people should be able to afford decent and stable housing. However, according to UN-Habitat, sub-Saharan Africa currently has a slum population of 199.5 million people, 61.7% of its urban population. The latest Human Development Index, a composite statistic that ranks life expectancy, education and income indices, puts the global HDI at 0.702. Thirty-three African countries rank at 0.535 or below, the lowest is Niger at 0.337. (Wadongo2014).

Another case in point is the notion of the middle class held by Mthuli Ncube, the Chief Economist and Vice-President of the African Development Bank. He was challenged by the IMF Survey: Many commentators have argued that Africa is rising because it is led by a growing pool of middle class consumers. But other critics argue that the traditional concept of middle class does not exist in Africa. What do you respond to that?"

Ncube at first seemed to have no doubts that "there is a middle class in Africa, and it has been growing at a rate of 3.2 percent per annum since 1983. You have over 300 million people who are sitting in the middle of the pyramid as I like to call it" (IMF 2013). But then it turns out that there is a need for a distinction. "Out of those 300 million people in Africa, half are

what you call the floating middle class. They could revert into poverty very easily because of a death in the family, or some other shock. At any given time, there is always a floating middle class. Then there is the more stable part of the middle class—about 150 million people, and they are ones who provide robust growth" (IMF 2013).

To complicate the matter further, he adds yet another element to the picture: "I think one element that is stimulating consumption from this middle class is the African diaspora. The diaspora now transmits more money into Africa than foreign direct investment, aid to Africa, and portfolio investment in stock market and bond markets. That supplemental income from the diaspora is enabling that floating middle class to consume more" (IMF 2013).

Now, while in terms of stratification it may not matter what the source of an individual's livelihood are-what is relevant, is how high or low is her income; from the perspective of class theory it is the latter question that is of secondary importance, whilst the former is paramount. However, it can be seen that the aformentioned definition falls under the rubric featured in the head-the fact of the matter is, the IMF interviewee's criteria of his two-tier middle class ar so loose that allow for a magical multiplication of its ranks, and by the same token, an inclusion of many social groups that in no socio-economic regard whatsoever could be conceived as "sitting in the middle of the pyramid", however the latter should be conceived In broader terms, even the title of the article being reported suggests that the reader could be forgiven for being surprised how not vulnerable to poverty-as the aformentioned example would have it-but poor pure and simple can the purported "new middle classes" in the developing countries be.

what does middle class mean in the developing world?

fresh research by the International Labour Organisation (ILO) economists shows in detail what's been happening to the workforce of the global south during 25 years of globalisation: it is becoming more stratified – with the rapid growth of what they term "the developing middle class" – a group on between $4 and $13 a day. This group has grown from 600 million to 1.4 billion; if you include around 300 million on above $13 a day, that's now 41% of the workforce, and on target to be over 50% by 2017. But in world terms they're not really middle class at all. That $13 a day upper limit corresponds roughly to the poverty line in the US in 2005. (Mason 2014)

On a global scale researchers generally define the middle class as the segment of society that earns between $10 and $100 a day. By that measure, for example, most Canadians are, at the very least, comfortably middle class. The reader could be forgiven for expecting an ensuing criticism of the term whose power of discrimination seems extremely low, which however is disappointingly replaced just by an admission that "But being middle class in New Delhi is not the same thing as being middle class in Winnipeg" (Mc Mahon 2014).

a definition of the category under examination may be cited, which owing to its over-inclusiveness constitutes a clear case of the aformentioned leaping methodology: "Another way to see it is that, after covering the essentials, middle-class households have some money to spare - in other words, they've risen above subsistence living and can start thinking about the future" (2014). Now, this is in point of fact a case analoguous to that of the central character in Moliere's comedy "Le Bourgeois gentilhomme", who was not aware he all his life was speaking prose. Similarly, the author of definition of the middle class cited above does not suspect that his definition rests in fact on the notion of the value of labour power. Contrary to some claims, the former notion extends far beyond the subsistence level;its creator, again contrary to the received wisdom, has been crystal clear on that point: "the number and extent of his so-called necessary wants, as also the modes of satisfying them, are themselves the product of historical development, and depend therefore to a great extent on the degree of civilisation of a country, more particularly on the conditions under which, and consequently on the habits and degree of comfort in which, the class of free labourers has been formed. In contradistinction therefore to the case of other commodities, there enters into the determination of the value of labour-power a historical and moral element"(Marx 1967; Ch. 6). Other chapters also,not excluding the next one, include abundant examples of so conceived leaping notions of the middle class.

*Marx's broad approach makes all the more clear that the definition in question is not fit for purpose. Whether it should be understood as encompassing all those employees who are paid according to the value of their labour power, or even-stretching the concept a bit-as referring to those who are overpaid compared to their value of labour power, the category thus carved out would be extremely broad, in any case too broad to designate anything like a single class, middle or otherwise. Another akin pronouncement can be regarded as a crypto-definition inasmuch as the outward guise, so to speak, of the definition in question merely masks what turns out to be the real tool by which to recognise individuals as being middle-class. According to Krueger (2014), "d*efining "middle class" in purely economic terms misses a lot. That's because to be middle class is as much a question of values as of income or wealth. "Middle class values," says development expert Homi Kharas , "emphasize education, hard work and thrift." The goal of all this, adds columnist David Brooks , is improvement - of the individual, family and society: "They teach their children to lead different lives from their own, and as Karl Marx was among the first to observe, unleash a relentless spirits spirit of improvement and openness that alters every ancient institution."

It's these values that make the middle classes so important - a reality underlined by recent protest in Brazil and elsewhere".

Any attempt at defining the middle class based on the hard core of values is untanable, however, if only because of its ahistoricity: the various historical embodiments of the said category may well exhibit very different values and attitudes:" Middle classes from Bangkok to Istanbul, from Cairo to Kiev seek to overthrow elected governments outside of the electoral cycle. Wary of majority rule, the middle class in the capital is ready to form alliances with traditional elites to disenfranchise ordinary citizens and even overthrow electoral democracy. Like their Egyptian peers, well-heeled Bangkokian protesters called for military intervention to deal with the rural masses and their "populist" masters. This anti-democratic behavior seems to contradict liberal notions of the middle class. In Seymour Martin Lipset's modernization theory, the equation was straightforward: the more middle class, the more democracy. Alexis de Tocqueville should, however, serve as a reminder that the middle classes have always been wary of 'the tyranny of the majority"' (Saxer 2014). From a dialectical point of view, both claims concerned may be true, only that concerning different times and different societies. at any rate, any sweeping generalisation in that regard is inconsistent with the very nature of inherently variable socio-historical reality.

As if admitting this much, , the author switches gear and calls in the same Homi Kharas, according to whom "there were 1.8 billion middle class people in the world (based on the $10 to $100-a-day definition) at the start of this decade. Europe and

North America accounted for more than half the total, and the next biggest share was in the Asia-Pacific region, with 28 percent of the total. By 2030, Kharas estimates that the middle class will total 4.8 billion, and around two-thirds will live in the Asia-Pacific". (Krueger 2014) Thus, it is all very well to reject "crude economism", talk about values, etc., but when it comes to statistics, it turns out that those "soft" definitions are difficult, if not impossible to operationalise and therefore have been replaced by their proponent himself**.**

The Perils of Subjectivism

if the use of at first glance objective measure like income does not preclude that a given definition subscribes to subjectivism, it is easy to imagine that this is all the more easy in the case of criteria that belong to the sphere of consciousness, such as widely used in stratification approaches prestige. Thus, if adopting such a point of departure, one would put the basic question:"„How Many Classes?", the answer would be anything but straightforward: "Describing the structure of prestige classes in a community is inevitably problematic. The analyst wants to know how many classes there are and where boundaries between them are located but soon discovers that there is little consensus on these matters. One reason, according to a study of a small Southern town by three Warner colleagues, is that the class structure looks different from the perspectives of people at different class levels (Davis) Gardner, and Gardner 1941:65). Their report, titled Deep South, demonstrated this phenomenon with a chart showing how the people at each level perceive the people at other levels. Based on patterns of association and lifestyles, the researchers found six classes among the town's white population, similar to the Yankee City classes.

By contrast, it turned out that the labels people themselves use for one another are quite different. […] People at all class levels perceive class differences, but there is disagreement about the number of classes in the community. No class recognizes a structure of six classes, corresponding to the Warnerian classes. Instead, they see four or five. they also find different bases for class distinctions.The above passage underlines how closely the concept of middle class is tied to that of stratification. This does not mean that class theory is not interested in income or consumption; far from it, the difference being within the latter framework such factors are construed as class, i.e. ownership dependent, and thus theoretically grounded and not just described as facts of life.

Misnomer and Oxymoron

In fact, the foregoing suggests not only that the term of middle class is marked by inherent shortcomings, but also that it is a misnomer. For the term in question is inseparable from a hierarchical vision of social differentiation, which constitutes one of the key hallmarks of social stratification as compared to class. This point, unfamiliar as it may appear, deserves some clarification.

Differentia specifica of a class is the fact that it is a social group rooted in the economic structure, whereas, by definition, it is not necessarily the case as regards social strata.

With all their differences (which often are overplayed) the only two classical theories of class-Marxian and Weberian-share this basic insight that class is an economic concept. Therefore, Haller (1970) was off base interpreting the Weberian revision of the basic Marxian model, as emphasizing "relationships among social units whose incumbents are unequal in wealth, power, or prestige … [variables that] constitute the minimum set of hierarchical inequalities which apparently discriminate among all peoples" (Haller 2004). For his interpretation squeezes Weber's class theory into the straightjacket of stratification, which is totally inadmissible. Moreover, in another context the same researcher goes even further, extending his reductionist approach onto Marx: " the three content dimensions of status which appear to be universal are wealth, power and prestige, as consistent with the early writings on stratification by classical sociologists (Marx & Weber, in particular)" (Haller 2004).

Thus, whilst social stratification, as even its name suggests, forms always a hierarchy, interclass relations are more complex and hence it is only seldom that a class structure may take a ladder-like shape. This much is pointed out bby Wright: "Both Marx and Weber adopt relational concepts of class. Neither define classes simply as nominal levels on some gradational hierarchy. For both, classes are derived from an account of systematic interactions of social actors situated in relation to each other. Classes for both Weber and Marx are thus not primarily identified by quantitative names like upper, upper middle, middle, lower middle, and lower, but by qualitative names like capitalists and workers, debtors and creditors" (2002). Wright's claim, however, falls short of an open admission that this gradational or nominal approach is not a class one at all, for it pertains to social stratification, as defined, in a typical formulation, as follows: "even the most egalitarian societies have some hierarchical structure, and in all democracies there are distinctions on the basis of education, income, occupation, cultural differences, and social mores related to prior schooling and membership in faith-based and many other institutions of society. Inevitably, some of these are perceived as having higher social standing than others; thus "social stratification" is a useful term to describe them" (Dictionary of Public Health 2013). The above definition calls attention to another attribute of stratification. the literature more often than not leaves out an important difference between the two approaches to social differentiation that differ along both the social space and time dimensions. In the latter case, stratification is held to be a universal feature of all human societies, whereas classes are said to be present in only some types of historically existing societies, in particular-characterised by the presence of private property. Regarding that suprahistorical attribute, in a typical formulation, " societies [...] always possess some kind of status system which, by its own values, places people in higher or lower positions"(Warner, Meeker, Eels 1960). Social stratification refers to a system by which categories of people in society are ranked in a hierarchy. The rankings apply to social categories of people who share a common characteristic without necessarily interacting or identifying with each other. To what extent that view has become part and parcel of common wisdom, is shown by the following case of the pair of authors who take the just mentioned premise for granted and by the same time, again in accordance with our above observation, conflate strata with classes: "Since stratification refers to hierarchically organised social relationships, stratification theory entails the analysis of structured social inequality in all its aspects: material, social and cultural. However, class analysis, with its focus on material inequality, has dominated stratification theory. Unfortunately, therefore, uncertainties about the state of class analysis and the 'cultural turn' within sociology have resulted in a waning interest in stratification generally"(Bottero,Prandy 2003).

Even more clearly the aforementioned error is apparent in the following definition which in addition equally mistakenly describes classes as universal: "Social class refers to the hierarchical distinctions between individuals or groups in societies or cultures. Anthropologists, historians, and sociologists identify class as universal, although what

determines class will vary widely from one society to another"(New World Encyclopaedia).

From the aforementioned fundamental premise it is concluded that in modern Western nations, stratification is broadly organised into three main layers: upper class, middle class, and lower class. Each class may be further subdivided into smaller categories (e.g. occupational). This approach closely follows that of W. Lloyd Warner, who made his name by the well-known definition of three social classes: upper, middle, and lower, with each level further divided into upper and lower.

There are, broadly speaking, two basic types of stratification systems: unidimensional and multidimensional ones. In the former case there is only one criterion of distinguishing particular social strata, be it prestige, acces to power(cf. Lenski 1966; Bendix and Lipset 1967), income(Gangl 2005; Iceland, Bauman 2007; Morris, Western 1999; Alderson, Nielsen 2002; Esping-Andersen 2007; Firebaugh 2000; Milanovic 2006; Hardin 2006), wealth (cf. Angle 1986), education level[3] (Breen, Jonsson 2005), occupation(Handel 2003; Kenworthy 2008; Blau, Duncan 1967: Breiger 1981; Lyn, Vaughn, Ensel 1981) etc.(cf. e.g. Farkas 2003), whereas the latter structure is based on a mixture of criteria, such as in the following study of outdoor recreation applying a multiple hierarchy stratification perspective conceiving of socio-economic status (SES), in terms such as the level of education, level of income and occupational status(Bultina, Field 2001) or , in the case of Gilbert (2011) on no less than ten discrete variables.

In both instances it is possible to discern such groups throughout the entire society. A case in point is Warner and his collaborators' statement to the effect that "Those who occupy co-ordinating positions acquire power and prestige. They do so because their actions partly control the behavior of the individuals who look to them for direction. Within this simple control there is simple power. Those who exercise such power either acquire prestige directly from it or have gained prestige from other sources sufficient to be raised to a co-ordinating position. For example, among many primitive peoples a simple fishing expedition may be organised so that the men who fish and handle each boat are under the direction of one leader. The efforts of each boat are directed by the leader and, in turn, each boat is integrated into the total enterprise by its leader's taking orders from his superior. The same situation prevails in a modern factory. Small plants with a small working force and simple problems possess a limited hierarchy, perhaps no morę than an owner who bosses all the workers. But a large industrial enterprise, with complex activities and problems, like General Motors, needs an elaborate hierarchy of supervision. The position in a great industrial empire which integrates and co-ordinates all the positions beneath it throughout all the supervising levels down to the workers has great power and prestige. The same holds true for political, religious, educational, and other social institutions; the morę complex the group and the morę diverse the functions and activities, the morę elaborate its status system is likely to be"(Warner, Meeker, Eels 1960:9). The authors believe it is possible to speak of "the stratification of employees, of children on school records, of names on a customer list, or of subscribers to a newspaper or magazine"(Warner, Meeker, Eels 1960:9). social stratification can be discerned in each and every walk of life, sports included, as an article on "Baseball's middle class" testifies; its author's reasoning clearly resembles the notion of median typical of the mainstream middle-class approach: "An usually high number of teams are hovering around the .500 mark. [...]The Washington Nationals are at the top of the middle class" (BERNHARDT 2014).

Radical as it may seem, the above case is small potatoes compared to the subsequent example, concerning a study conducted at the Mpala Research Center, Kenya that "is home to more than 20 large mammal species, which can be divided, inter alia, along the key lines of social class-the reader is told-whereby "individuals can be subdivided into three distinct social classes: territorial males (T), bachelor males (B), and nursery herd members (N)" (Estes, 1974).

These classes denote age, sex, and behavior, but also reflect intraspecific gradations in territoriality, for example, territorial males defend patches of habitat against other males. This is not to deny, sure enough, sometimes elaborate social organisation that can be observed in many animal species, but the crucial question is: what cognitive advantages, as opposed to confusion, are to be derived from the terminology common to the zoologist, , Marx and Weber? The question imposes itself all the more forcefully that one of the articles invoked above as a source of this peculiar approach bears the title "Stratum identification..." [emphasis-J.T], which in its own way illustrates the purported affinity of both approaches concerned that in the present paper is called into question, or more precisely, reduced to the domain of language illegitimately appropriated by stratification approaches.

Inherent Weaknesses of Stratification

The distinction discussed above finds its confirmation in what for many will be an unlikely source, namely chaos theory championed by many postmodernist theorists (the truth of the matter is that the author of "Dialectics of Nature" would be first to embrace this analytic perspective as being a modern articulation of precisely the very dialectical approach Engels, Marx, Simmel and many others pursued so successfully).[4] " William Johnson and Michael Ornstein, (1980). compared several different approaches to the scanning for class dynamics in complex data sets. Those who used conventional measures of class standing (education, income, occupation, self-identification and such) were not able to locate such basins of attraction in national survey data. Those using other parameters (the ownership and control of production facilities, control over new capital investment, and control of the labour process itself), three researchers (Carchedi, Poulantzas and Wright) were able to find hidden attractors while those using conventional measures above, were not" (Young 1994).

The above statement clearly suggests that the distinction between the two above perspectives is critical not just for termininological reasons. The point is not the nomenclature by

[3] Thus, a team of sociologists explain why a specific class framework was adopted in their study on dental health of children: " The level of education of the head of the family was used as social class indicator (university degree, ^15 years of school education, high school 12-15 years, secondary school 6-11 years and primary school <6 years). This indicator is considered the most valid for the Italian population" (Faggiano et al. 1999). The point on merits of education as the best class framework for Italy has been simply stated, not argued, nor, too, has been any supportive evidence supplied. supplied.

[4] The affinity of chaos theory and dialectics is underscored by the historicity of the former, while the principle of historical contextualisation constituts part and parcel of any dialectical theory worthy its name.

itself but the corollary of the notion of stratification To be sure, it cannot be maintained that all class theories are consistent and built on well specified foundations, but in the case of stratification schemes, arbitrariness and discreteness is written into their very foundations. When one lays out a scale of income, for instance, it may be divided in almost innumerable ways and such scales are never definitive in the sense that one can always shift particular income boundaries because in the nature of a given theory there is nothing to ban it.

Interestingly, some stratification analysts seem to be aware of this fundamental flaw-the terminology used in the argument cited below should not come as a surprise, since we have already called attention to the widespread mislabellling of what, from a theoretical standpoint, constitute social strata: „We define social classes as groups of families. morę or less egual in rank and differentiated from other families above or below them with regard to characteristics such as occupation, income, wealth, and prestige.'

Our approach raises two questions: Why conceive of stratification in terms of discrete classes?" (Gilbert 2011:17) Gilbert thus does understand that from the mainstream stratification perspectives an indispensable transformation of a continuum into a series of discrete units, or "quantization" cannot be taken for granted, but requires justification, which however, as a rule, is not forthcoming.

For that reason the following definition of Stratification as "a system with socioeconomic strata, sharp social divisions based on unequal access to wealth and power"(Brym 2003) formulates a rather unattainable ideal, since the intended boundaries may be sharp, but they are easily changeable and thus liquid rather than solid.

The flaw of excess latitude pertains also to the most famous, structural-functional theory of social stratification that posits that "social inequality among different strata in the amounts of scarce and desired goods, and the amounts of prestige and es-teem which they receive, is both positively functional and inevitable in any society" (cf. Tumin 1953).

How many social strata there are? This question is essentially impossible to answer on the basis of Davis and Moore's framework. What is more, even if it was possible, one could not indicate why there should be this particular number.

The same deficiency is shared by George C. Homans's approach to stratification, according to which "status in society as a whole, like in small groups is earned or recognised by what people give and get in social exchange (...) the phenomena of stratification in small groups are so similar to this how these phenomena look like in global societies, that in both cases they must have been generated by the same processes" (Homans, 1974: 307-8).

The consequence of this theory of social stratification, and at the same time proof of its subjectivist nature is an inability of an identification of particular strata, or, how Homans himself calls them, 'classes'. The author of „Behaviour as Social Exchange"

Autor „Social Behavior" uses, in order to outline the character of social divisions as viewed by his theory, the telling metaphor of the spectre of colours within which higher bands such as purple – then the next one, a little lower, e.g. the red one, etc. Could be discerned, but in which the interstice between the colours would be continual, and any other, but only an arbitrary line of partition could determine, where crimson has ended, and where redness has begun"(Homans, 1974b: 309).

In another, this time not based on metaphors, statement Homans maintains that from the standpoint of his conception „attribution of individuals to particular classes cannot be nothing else as an arbitrary thing; it would be perfectly right to call a member of the upper clas a member of the middle class"(Homans, 1974b: 310).

These statements perfectly fit our earlier identification of one of the basic flaws of stratification theories as consisting in a lack of criteria of placing particular inividuals in specific slots.

Conclusion

The foregoing implies that the concept of middle class is in fact a misnomer-the adjective "middle" speaks to its intrinsic hierarchical quality, which is but one feature only in some special circumstances shared by class theory, A number of such differences and their ensuing consequences justify the conclusion that an integral element of stratification, "the middle class" should be discarded.

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