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ORIGINAL ARTICLE **OPEN ACCESS**

“You Can't Always Get What You Want”: Middle-Class Expectations and Incomplete Social Contracts in the Global South

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ABSTRACT

Over the past decade, much of the global middle class has become more vulnerable and disillusioned. Drawing on original qualitative surveys in Brazil, Côte d'Ivoire, Turkey, and Vietnam, this paper reveals a persistent disconnect between middle-class expectations and government policy in the core domains of the social contract: public services, social protection, and participation. On the demand side, middle-class respondents report frustration with poor service provision—particularly in education, health, and security—and with tax systems, they perceive as burdensome yet unreciprocated. On the supply side, policymakers emphasize market access and credit expansion while retreating from broad-based public support, a pattern we term “laissez-faire paternalism.” Despite their dissatisfaction, middle-class citizens often remain politically disengaged due to fragmentation and institutional barriers, producing a form of “truncated citizenship” in which they enjoy consumption rights but lack political influence. These findings challenge the assumption that middle-class growth naturally drives reform. Instead, we find a fragmented and politically instrumentalized group with limited capacity to press for change. By contrasting demand- and supply-side perceptions, the paper uncovers institutional blind spots and warns of rising frustration and instability if governance does not become more inclusive and responsive.

1 | Introduction

In recent years, the global middle class has shown rising signs of discontent and political unrest (Desai 2018; Liddiart 2019; Cliffe 2022). As Davies (1962) theorized, frustration often erupts when periods of perceived progress are abruptly halted, something increasingly felt among the middle class today. Once central to building and stabilizing democratic regimes, particularly in the Global North (Lipset 1959; Moore 1966; Goldthorpe and Lockwood 1963), the middle class now feels increasingly excluded from the very systems it helped shape, including post-war welfare

states (Stigler 1970; Esping-Andersen 1990; Baldwin 1990; Oude Nijhuis 2022). From Europe to the United States and across many middle-income countries, this group faces growing pressures—rising living costs, stagnant wages, pandemic shocks, and weak governance, leading to increased vulnerability (Vaughan-Whitehead 2016; OECD 2019; Derndorfer and Kranzinger 2021) and dissatisfaction (Burgoon et al. 2019; Kurer and Palier 2019; Derndorfer 2024). In the Global South, this is intensified by persistent gaps between expectations and public policy delivery (Birdsall et al. 2014). Many feel overtaxed yet underserved, stuck between underperforming public systems and costly private alternatives (Birdsall et al. 2014;

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World Bank 2021; Grimson et al. 2024). This growing disconnect, viewed as a breach in the social contract, has already proven particularly destabilizing in fragile democracies (Naim 2017; Desai 2018; Basri 2023).

Given the economic and political weight of the middle class, understanding the roots of this growing frustration is crucial, especially in the Global South, where institutional fragility amplifies the risks of political disorder. This paper investigates the extent to which existing social contracts in developing countries (DCs) align with—or fall short of—middle-class expectations in three core domains: security (protection), basic services and economic opportunity (provision), and inclusive decision-making (participation), as framed by Loewe et al. (2021) and Loewe and Albrecht (2023). In countries where social contract is recent, incomplete, and moving, individual experiences of its benefits are heavily biased by a lot of parameters including education, occupation, and income, or social position. The same holds for the supply side of policies supporting social contracts, that is, the policymakers and marketers. One good way to assess social contracts in the Global South is therefore to ask their main beneficiaries and contributors, the middle class, and the stakeholders involved in policymaking about how they perceive their substance, scope, and stability. This is what we do in this paper.

In advanced democracies, theories of social contract development often assume a symbiotic relationship between welfare provision, fiscal capacity, and democracy (Rueschemeyer et al. 1992; Lindert 2004). These models generally rest on the assumption that the middle class is both politically influential and economically central, facilitating stable coalitions that support the rule of law, redistribution, and public investment (Boix 2003; Acemoglu and Robinson 2006; Chen and Suen 2017). In the Global South, this relationship is far more complex. A vast literature has shown how high informality, limited fiscal space, elite capture, and weak political accountability result in social contracts that are often incomplete, truncated, or skewed in favor of narrow interests (Mares and Carnes 2009; Holland and Schneider 2017; Holland 2018). In addition to this, although the middle class is booming in numerous developing regions (Kharas 2017), it is highly fragile for the bulk of it, gathering asset-poor people weakly included in markets and protected by formal institutions (Banerjee and Duflo 2008; Ravallion 2010; World Bank 2021), and politically disempowered.

This study aims to assess how social contracts in DCs are perceived by middle-class citizens and key policy stakeholders in four countries: Brazil, Côte d'Ivoire, Turkey, and Vietnam. Relying on original qualitative fieldwork conducted before the Covid-19 pandemic, including qualitative interviews and secondary household surveys, this paper maps perceptions of social contract performance across the three core domains of protection, provision, and participation. More specifically, it investigates the extent to which middle-class expectations—the demand side—are matched by the design and implementation of public policies—the supply side. Our originality is that we document these gaps from below, that is, from the crossed perceptions of middle-class households on the demand side of the social contract and from a selection of key stakeholders on the

supply side of social contracts. Perceptions are central as they drive political behavior, often more than objective trends that are not easily observable. Perceptions are closer to the de facto institutions of social contracts as they incorporate both the existence and the experience of policies. Another originality is the comparative perspective of our study, which covers four developing countries with contrasted historical, political, and economic characteristics. The study asks: To what extent do middle-class and policymaking respondents think middle-class needs are addressed or overlooked in these countries? What explains the variation in middle-class influence and satisfaction across contexts? What do respondents think are the risks raised by such incomplete social contracts?

What our study reveals is a significant disconnect between middle-class expectations and state responses across the four countries investigated. Findings suggest a consistent perception among respondents of unmet expectations, particularly in areas related to public goods, corruption control, and economic security. Whereas some expectations, like demands for better education or healthcare, are broadly shared, others vary significantly by socioeconomic subgroups within the middle class and national contexts. Governments, for their part, have largely refrained from designing targeted middle-class policies, instead relying on market-based solutions that do not address underlying vulnerabilities. From the perspective of many middle-class respondents, the social contract appears flawed and disappointing. Yet, this perceived failure is not mirrored by policymakers or private market actors, who often view these gaps as opportunities rather than shortcomings. The interviews notably highlight a model of “laissez-faire paternalism,” where governments facilitate market access but retreat from public provision. By juxtaposing citizen and policymaker perspectives, the study uncovers institutional blind spots and growing risks: rising disillusionment, financial precarity, and the potential for social backlash. Incremental policy reforms have attempted to address these gaps, but systemic challenges persist. Still, both demand- and supply-side dimensions must be aligned for the social contract to be perceived as fair, complete, and resilient.

This analysis contributes to a growing literature on social contracts in the Global South (Cloutier et al. 2021; OECD 2023; UNDP 2024). Although earlier work has focused largely on structural supply-side constraints, this paper introduces a bottom-up, demand-and-supply framework. Our original contribution to this emerging literature lies in (i) the mirror analysis of the supply and demand sides of each policy domain constitutive of social contracts and (ii) the “from the bottom” perspectives on these social contracts, that is, through perceptions, not institutions or structures as is usually done in the literature. Our decomposition of social contract deliveries relies largely on recent operationalization of Global South social contracts by Loewe et al. (2021). Yet, whereas Loewe and Albrecht (2023) surveys citizens' preferences in terms of the hierarchy of provision, protection, and participation deliveries, our analysis provide a novel comparative and related perspective on both middle-class grievances and government (un)responsiveness, offering more comprehensive understanding of the political economic mechanisms explaining why incomplete social contracts persist. Our paper notably innovates by applying a dual demand-supply

perspective (middle-class expectations vs. policy responses), whereas most previous studies (e.g., Cloutier et al. 2021; OECD 2023) focused only on supply-side/state-centered views.

Our analysis also confirms and extends existing work on middle-class fragility. We notably connect strongly to Wietzke and Sumner (2018), Birdsall et al. (2014), and Clément et al. (2022), who show that the “new” middle class is fragmented, asset-poor, and politically weaker than classical modernization theory assumed. We think we add depth by showing that internal divides within the middle class (e.g., old vs. new, formal vs. informal workers) explain why it struggles to act as a unified pro-reform force. By reframing Policy Gaps as “truncated citizenship” and “laissez-faire paternalism,” we build former work by Cook and Dimitrov (2017) and Cammett et al. (2015) and highlight that in many emerging economies, middle-class citizens are treated as market participants but denied full political inclusion, what we term “truncated citizenship.” You innovate by introducing the idea of “laissez-faire paternalism”: Governments encourage market integration and credit expansion without expanding public provision or meaningful protection, compounding middle-class vulnerability.

Ultimately, this study engages with broader theoretical debates on modernization versus contingency theories of policy change. Although the modernization theory predicts that a growing middle class will foster more responsive institutions and inclusive policies, our findings suggest that structural barriers, including political repression, elite capture, and fiscal constraints, continue to limit middle-class agency in many DCs. Even when middle-class aspirations shape consumer and credit markets, their impact on governance and public services remains weak and fragmented. We push back against the classical Lipset (1959) modernization argument that middle-class expansion leads automatically to democratization. Instead, aligning with Eibl (2020) and Sumner (2016), we show how fragile middle classes in DCs often prefer stability, private coping strategies, or even illiberal retrenchment over collective political mobilization. Finally, we echo Burgoon et al. (2022) and Pontusson and Weisstanner (2017) by suggesting that a disenfranchised, fragmented middle class can fuel political volatility, populism, or backlash if institutional trust continues to erode.

In short, our paper confirms, extends, and reframes key strands of recent political economy and development literature, offering a novel, perception-driven, demand–supply analytical framework to understand why incomplete social contracts persist and why addressing middle-class vulnerabilities matters urgently for political stability.

In the rest of the paper, we present the framework of social contract analysis used to organize the research (Section 2), before we provide more details on the data and methodology (Section 3), and present our findings by contrasting the demand- and supply-side answers for each of the three main delivery domains of social contracts, protection (Section 4), provision (Section 5), and participation (Section 6). Section 7 connects our findings to the existing literature on middle class and social contracts in the Global South, before Section 8 concludes by developing some polity implications.

2 | Incomplete Social Contracts: Framework for Analysis

2.1 | Incomplete Social Contracts: What Are We Talking About?

The concept of the social contract has long framed the relationship between states and citizens. Rooted in Enlightenment thought, it captures implicit or explicit agreements that legitimize political authority (Loewe et al. 2021). After WWII, welfare states in Western democracies institutionalized this model: Citizens accepted progressive taxation in return for universal social services, reinforcing political stability (Esping-Andersen 1990; Barr 2001; Rehm 2016). Modern definitions emphasize reciprocal obligations: Governments deliver physical and social protections, public services, and inclusion, whereas citizens comply with laws, pay taxes, and participate civically. These expectations converge around three core domains: protection (security), provision (services and opportunity), and participation (inclusive governance) (Loewe et al. 2021; Loewe and Albrecht 2023).

First, a broad literature has analyzed the protection and redistribution dimension of social contracts in advanced economies. Central in this literature is Rehm et al. (2012), which shows that popular support for welfare hinges on whether economic disadvantage and economic insecurity overlap. When distinct, support is broader. Rehm (2016) finds that risk exposure increases redistributive demand, echoing Meltzer and Richard (1981) on the inverse relation between income and welfare support. However, the literature also emphasizes that public backing for welfare has eroded in the last decades. Globalization, technological change, and privatized protection increased inequality and insecurity, weakening traditional coalitions (Genschel 2004; Hemerijck 2013; Rehm 2020). High-income individuals often self-insure, reducing collective buy-in. These pressures are more severe in developing countries, where welfare systems are weaker. Capital mobility and limited labor force political agency have stalled expansion (Rudra 2009). In many cases, only a small minority of formal workers is protected, whereas most citizens experience both low income and high risk (Cloutier et al. 2021; Martins-Neto et al. 2024). As Rehm (2016) notes, reforms typically occur only when risk extends beyond the poor. Yet, informality hinders pro-welfare coalitions. Some middle-income democracies have expanded welfare since the 2000s, driven by democratization, fiscal capacity, and mobilization (Holland and Schneider 2017; Dorlach 2020). Yet, social contracts in these contexts remain fragmented and fragile, lacking the universalism and progressive taxation found in advanced economies.

Conceptually, social contracts are dynamic socio-political equilibria shaped by how well state policies align with citizen expectations (Alston et al. 2013; Loewe et al. 2021). A complete contract must deliver on all three Ps—protection, provision, and participation (Loewe and Albrecht 2023). Citizens may tolerate deficits in participation if protection and provision are adequate. Loewe et al. (2021) propose evaluating the different delivery domains of contracts using three Ss: substance (quality of outputs), scope (coverage), and stability (sustainability). The more expansive and effective these are,

the more complete the contract. This P–S matrix will guide the analysis of the four countries covered in our study. Unlike institutionalized welfare models in advanced economies, DCs face limited state capacity and unequal service access. As a result, contracts often fail to deliver on core expectations (Loewe and Albrecht 2023), contributing to instability and state fragility (Grävingsholt et al. 2015). The middle class, especially, is caught between poor public services and costly private alternatives (Birdsall et al. 2014). These metrics explain why some contracts endure and others fragment. Strong contracts are universal, equitable, and resilient. In contrast, in DCs, contracts are often limited in substance, narrow in scope, and fragile in stability, breeding middle-class disillusionment and weakening legitimacy.

The literature traditionally identifies three common social contract failures in developing countries: authoritarian, rentier, and clientelist. Authoritarian contracts deliver welfare while curbing political rights (Henry and Springborg 2010; Eibl 2020). Rentier states use resource wealth to fund goods without taxation, reducing accountability (Schwarz 2008; Cammett et al. 2015). Clientelist systems favor selective patronage over universal benefits, undermining solidarity (Ruiz de Elvira et al. 2018; Beck and Richter 2021). Yet, more moderate forms of incomplete contracts also exist in democracies, where political rights are protected but provision and protection fall short. Welfare states are notably often truncated: Benefits target formal-sector workers, whereas informal workers face regressive taxation and poor services (Mares and Carnes 2009; Holland 2018). Various political and fiscal constraints also block reform, even where non-contributory programs have grown (Holland and Schneider 2017; Busso et al. 2021). In these incomplete social contract settings, the middle class, especially informal workers and small entrepreneurs, remains highly vulnerable to shocks due to limited safety nets.

Instability is another hallmark of incomplete contracts. Weak rule of law, political volatility, and short-termism hinder investment in social infrastructure (World Bank 2016; Olanubi and Olanubi 2023). These conditions create uncertainty, eroding trust, particularly for middle-class groups that rely on consistent

policies. Protests in response to inadequate services, corruption, and rising costs have proliferated (Rodan and Hughes 2014; Casas-Zamora and Carter 2017). Transitions to more inclusive contracts can also provoke disruption. Reform must therefore be carefully managed to avoid exacerbating instability.

2.2 | Incomplete Social Contracts: Assumptions on Demand-Side and Supply-Side Mechanisms

Analyzing the demand- and supply-side mechanisms behind social contracts helps interpret perceptions collected in the field. These are synthesized in Table 1, which combines the three policy deliverables (3Ps)—protection and redistribution, provision, and participation—from Loewe et al. (2021), with two effectiveness indicators (2Ss)—substance and scope—to assess social contract completeness.¹ Each cell is broken down by demand- and supply-side mechanisms, some established in the literature and others inferred from this study's findings.

On the supply side, fiscal and governance constraints significantly limit both the substance and scope of service delivery. Weak tax collection, elite evasion, and regressive systems hinder universal welfare development (Besley and Persson 2011). Many developing countries rely on consumption taxes that disproportionately affect low- and middle-income groups (Genschel and Seelkopf 2016; Gerber et al. 2020). Informality shrinks the tax base, whereas corruption and inefficiency divert resources (Holland 2018; Colonnelli et al. 2020). Even when budgets prioritize social sectors, clientelism distorts equitable distribution (Berens and Ruth-Lovell 2021; Lupu 2024). All this leaves welfare truncated and biased toward formal workers (Holland and Schneider 2017; De la O et al. 2023).

Other supply-side mechanisms reflect tensions weakening social contracts, notably in the protection dimension. Lupu (2024) shows that in Latin America, weak party systems fail to represent redistributive preferences, especially of the middle class. Biased responsiveness of public policies tending to respond unevenly to the different constituencies, to the benefit of the upper class and at the cost of the middle class, has also been

TABLE 1 | The 3P–2S matrix of social contract completeness and the assumptions on demand-side and supply-side mechanisms.

Policy domains Social contract effectiveness	Protection and redistribution	Provision	Participation
Substance	(D) High preference for security + low preference for redistribution (S) Weak fiscal capacities + representation gap + clientelist versus programmatic	(D) Consumerism and preference for market (S) Limited fiscal and administrative capacities + corruption	(D) Preference for security (S) Authoritarian bargain
Scope	(D) Heterogeneous preference for redistribution (S) Biased responsiveness or representation gap + “easy redistribution”	(D) Opting-out (S) “Partenalist liberalism”	(D) Political alignment and self-restraint + weak political institutionalization (S) Political instrumentalization

emphasized by the literature on Western democracies (Elkjær and Klitgaard 2021; Lupu and Pontusson 2023) as well as for emerging economies (Lupu and Warner 2022; Grossman and Slough 2022). Lupu (2024) notably argues that Latin American parties rely on clientelism rather than programmatic platforms, limiting transformative redistribution and leading to inequality traps where high inequality erodes party strength, which in turn prevents redistributive reform. A related, less documented mechanism is what we call “paternalist liberalism” in this study, where governments promote market access while retreating from public service provision, especially in health and education.

Political choices further shape supply-side substance in terms of participation deliveries. In the MENA region, for example, states historically traded socioeconomic protection for limited political rights—authoritarian bargains (Desai et al. 2009). Middle-class preference for stability explains persistent gaps in participation and protection, now worsened by rising insecurity in Latin America (Hernandez-Roy et al. 2025). In the Middle East, some of these arrangements collapsed under demographic and fiscal pressures, sparking uprisings and authoritarian backlashes (Cammatt et al. 2015; Loewe et al. 2021). Countries like Egypt now exhibit low-quality services, limited protection, and restricted participation (Loewe and Albrecht 2023).

On the demand side, weak and fragmented support for redistribution explains shortfalls in the substance and scope of protection. Many middle-class households prioritize asset protection over broad redistribution (Wietzke and Sumner 2018). Relative stagnation can raise redistributive support, but absolute stagnation often reduces it due to concerns over costs (Mérola and Helgason 2016; Weisstanner 2023). This drives some toward right-wing parties focused on security (Burgoon et al. 2019; Derndorfer 2024). Divisions within the middle class deepen the fragmentation: Wealthier segments favor liberalization, whereas more vulnerable ones seek protection (Palma 2011; Sumner 2016; OECD 2019). Middle-income groups often pay taxes without receiving adequate services, weakening their support for redistribution (Birdsall et al. 2014; Holland 2018; Busso et al. 2021). Hence, even in highly unequal areas like Latin America, middle-class redistributive support is fragile (Holland 2018; Hoy and Mager 2022), with more households turning to private health and education (De La O et al. 2023).

In terms of provision, the literature also documents a middle-class consumerist preference (Clément et al. 2022) and a forced preference for market provision as per education and security, largely reflecting public provision flaws and inefficiencies. This pattern also results in opting out of the fiscal system for parts of the middle class that consider they are net losers of the contributive system (Birdsall et al. 2014; De La O et al. 2023). Support for democratic participation among the middle class is similarly inconsistent. Although middle-class mobilization has driven democratization in regions like East Asia and Latin America (Birdsall and Haggard 2000; Remmer 1992), it has also backed authoritarian shifts when democracies failed to deliver, such as in Thailand (2006, 2014), Egypt (2013) (Desai 2018), and parts of the post-Soviet world (Eibl 2020). In recent years, middle-class voters in Europe and Latin America have increasingly turned to

far-right movements (Kurer 2020; Pereira 2023). Reactions to declining rights or entitlements depend on interests, employment status, and political agency, ranging from protest (especially among younger, educated groups) to disengagement (Campante and Chor 2014; Rosenfeld 2020). Middle-class alignment with the state has also been documented under rentier, clientelist, and authoritarian models (Cammatt et al. 2015; Rosenfeld 2020).

3 | Approach, Method, and Data

This paper examines whether and how the expectations of different subgroups within the middle-income class are met by political and policy changes in a sample of developing countries. The first objective is to assess the heterogeneity of middle-class expectations regarding the provision, protection, and participation deliveries of social contracts and perceptions of how well these have been addressed by existing public policies. The second is to identify the mechanisms that shape the gap between expectations and policy responses.

Adopting a comparative approach inspired by the historical sociology of dramatic contrasts (Skocpol and Somers 1980), we study four contrasting countries—Brazil, Côte d’Ivoire, Turkey, and Vietnam—without presuming similarity or irreducibility. To ensure consistency and comparability, a standardized analytical framework was applied across all four countries. Our comparative analysis uses a mixed-methods approach combining national household survey data with original qualitative interviews in four countries. The quantitative phase identifies middle-income groups using income thresholds and explores their internal diversity through cluster analysis based on socioeconomic characteristics. More specifically, based on microeconomic data from nationally representative household surveys,² our method is sequential, combining the income-based and sociological definitions of the middle class by (i) first using information on income in order to delimit a middle-income group, that is, a group of households located in the middle of the income distribution, and (ii) then exploring the heterogeneity of this middle-income group by implementing a mixed classification procedure on five socioeconomic categorical variables characteristic of the household head: education, occupation, employment status, institutional sector, and multi-activity practices.

Defining the middle class in developing countries is complex, largely because income thresholds vary significantly across studies. Some definitions start as low as \$2 per day (PPP), though this level leaves households highly vulnerable to economic shocks (Ravallion 2010). Other definitions adopt higher starting points, such as \$10 per day, to better reflect economic security. There is also considerable variation in defining the upper income limit. In this article, we adopt a mixed approach: an absolute lower threshold combined with a relative upper threshold. Specifically, we set the upper limit at the 95th income percentile in each country to exclude high-income elites. However, we apply country-specific lower thresholds to account for significant differences in national income distributions. For example, in Côte d’Ivoire, 68.5% of the population lives on less than \$4 per day, but in Turkey, only 2.7% fall below that level. Based on these considerations, we define the middle class as those earning between \$4 and the 95th percentile in

Vietnam and Côte d'Ivoire and between \$10 and the 95th percentile in Brazil and Turkey. These thresholds are consistent with common practices in the literature and are aligned with each country's income distribution and poverty lines. Using these definitions, the middle class comprises 26.4% of households in Côte d'Ivoire, 72.5% in Vietnam, 61.4% in Brazil, and 75.4% in Turkey.³

In each country, based on the five socioeconomic variables mentioned previously, the group of middle-income earners is then classified through mixed classification procedure combining non-hierarchical and hierarchical clustering methods into internally homogeneous, yet clearly distinct groups. In order to better characterize them, we finally compare the different group means for a large set of socioeconomic variables including those used for the cluster analysis. These classifications are detailed in Clément et al. (2022) and summarized in Table S1. The table outlines the socioeconomic makeup of the middle class in Brazil, Côte d'Ivoire, Turkey, and Vietnam, revealing stark national contrasts. In Brazil, the middle class is diverse, split across retirees, formal workers, and informal labor, with a relatively balanced structure: 17% upper, 44% middle, and 39% vulnerable. Côte d'Ivoire has a predominantly vulnerable middle class (79%), heavily composed of informal workers and farmers with low education and equipment, and a small elite of urban professionals. Turkey's middle class is more urban and formalized, with significant shares of retirees, formal workers, and a notable upper group, but still 52% are vulnerable. Vietnam's middle class is largely rural and poor, dominated by farmers and informal workers, with 77% in vulnerable conditions and only 23% in the upper segment. Overall, Brazil and Turkey show more fragmentation and urban formal employment, whereas Côte d'Ivoire and Vietnam are marked by rurality and economic insecurity within their middle classes. In all countries, the upper middle class is composed of civil servants, private sector professionals, and entrepreneurs, with this group accounting for higher shares of the total population in Turkey and Brazil.

The qualitative phase deepens the analysis by examining behaviors, perceptions, and aspirations within these identified groups. In 2017–2018, semi-structured interviews were conducted with 25–30 households per country, selected in the field to match the socioeconomic profiles (occupation, education, age, and job type) of middle-class segments identified in the first step. Selection reflected each cluster's share of the national middle class. Interviews explored middle-class preferences and expectations around political and policy reforms, covering economic aspirations, access to public goods, views on social justice, social protection, quality of life, and political preferences. Standardized yet locally adapted guides ensured comparability while accounting for contextual differences. To capture spatial heterogeneity, interviews were held in both a metropolitan city (Rio, Abidjan, Istanbul, and Hanoi) and a smaller city (Fortaleza, Soubre, Gaziantep, and Nam Dinh).

A second qualitative field survey was also conducted in 2017–2018 to capture the supply side. Semi-structured interviews were held with key informants from public and private organizations involved in policy formulation and implementation (e.g., ministries and health and education officials) or in providing market goods to middle-class consumers. Table S2 lists the wide

range of sectors covered: education, health, finance, housing, consumption, and more. Key informant interviews collected data across three dimensions: (i) concerns and policy challenges regarding the middle class; (ii) existing policies, gaps, and trade-offs; and (iii) stakeholder political engagement on both demand and supply sides. These interviews, alongside contextual policy reviews, assessed how well middle-class expectations are recognized by institutional and market actors and how these influence agendas.

Together, both surveys document perceptions of the social contract across demand and supply sides, focusing on the domains of protection (from insecurity, violence, and corruption), provision (public goods and opportunities), and participation (tax compliance and political engagement). These dimensions were both prompted in the survey guide and spontaneously emphasized by respondents.

4 | Provision Delivery: Substance Gaps

Across Brazil, Côte d'Ivoire, Turkey, and Vietnam, the middle class expresses a clear and strong demand for public goods, infrastructure, and social services, not simply as private consumers, but as citizens with expectations of a fair social contract. However, institutional perspectives, as captured through interviews with public actors, reveal a disconnect. The dominant policy logic treats the middle class not as a group entitled to social support or institutional attention but as a group largely autonomous, best served through market mechanisms. This results in a growing mismatch between demand-side expectations and supply-side provisions and, in many cases, leads to frustration, inequality, and political disengagement. This section explores this demand–supply tension across two main themes, namely, consumption and market inclusion, including housing and credit, and education and healthcare.

4.1 | Aspirations of Consumption and Market Inclusion

Middle classes in the Global South are often perceived primarily through their consumption patterns, leading to their characterization as “consumer classes” (Therborn 2014; Wietzke and Sumner 2018). The literature (Dadush and Ali 2012; Melber 2016) has largely described the middle classes in DCs on the angle of durable asset ownership. Unsurprisingly, in all four countries, middle-class households express strong aspirations for consumption, especially in terms of durable goods, housing, education, leisure, and lifestyle investments. These aspirations are in many ways a key marker of their identity and status. In Brazil, Turkey, and Vietnam, such consumption is associated with participation in modern life and recognition as full members of society. Yet, these aspirations are often realized through financial strain, with many respondents describing how consumption relies heavily on debt. Across all contexts, for example, credit market liberalization has enabled housing acquisition, at a price. Respondents report increasing levels of indebtedness and financial anxiety. A Turkish interviewee summed it up: “We got houses, cars, but now we are stuck with the loans.” In Brazil, similar dynamics emerged under Dilma

Rousseff's administration, where subsidized credit supported both consumption and housing, but with limited follow-up to manage debt burdens.

Despite these risks, governments continue to view credit access as the main vehicle of middle-class consolidation, often ignoring the need for accompanying protections, such as savings support, rent regulation, or foreclosure prevention. In Turkey, a professional in the consultancy sector summarizes this phenomenon succinctly: "The middle class goes on holidays, relentlessly spends, but is permanently in debt." A similar story emerges from Brazil, where expanded access to credit allowed consumption to rise, but without improving long-term financial security. "The middle class was formed not by producing, but simply by going into debt and through the service sector," admitted a Brazilian respondent, reflecting on how consumption masks structural fragilities in the whole economy. In the poorer Vietnam and Côte d'Ivoire, unequal access to credit creates a fragmented picture: Whereas wealthier middle-class households can finance consumption, those at the lower end remain excluded from financial mechanisms. This leads to a deep internal divide within the middle class itself, between those who can leverage credit and purchase equipment goods or invest in housing and those who cannot.

From the supply-side perspective, institutional actors largely validate this consumerist framing. As has become common in the institutional literature (ADB 2010; AfDB 2011; Kharas 2017), the consumption perspective is generally used to highlight the role of new middle classes as drivers of economic growth and targets for market expansion. But and perhaps less expectedly, the middle class is framed across all countries as a "self-sufficient" and non-priority group by supply-side respondents. In Côte d'Ivoire, a senior education official explicitly stated: "I would be wrong to target these categories. Because they are doing enough already." A Vietnamese policymaker similarly confirmed that policy remains focused on "rural areas and vulnerable groups," whereas middle-class demands are assumed to be handled by market dynamics. Our country policy reviews (Berrou et al. 2018, 2019; Asli Danis et al. 2019; Clément et al. 2018) confirms that, at the time of the survey, sectoral policies in all four countries primarily targeted middle-class consumption by fostering market income growth and developing new markets through regulation and public-private programs.

In parallel, governments have prioritized credit liberalization and market deregulation as key policy tools. Yet, although these facilitate access to consumption goods, they also contribute to financial fragility, particularly where public safety nets are weak or non-existent. Credit reforms, in particular, have increased financial fragility, especially in Turkey and Brazil. A Turkish consultant noted: "The middle class improves its way of life but does so by going into debt ... with credit cards." In Brazil, deregulated credit access in the late 2000s led to a surge in consumption loans, leaving many families struggling with repayment by the 2010s.

Housing is a very emblematic area in this respect. In all four countries, housing is a central aspiration of the middle class, both as a social marker and as a strategic asset. Yet, housing provision is a domain where state support remains highly uneven

and regressive, housing policies remaining concentrated in the higher-income segment, leaving the vulnerable middle class dependent on informal and unstable housing markets. In Turkey, the TOKİ program was designed to deliver mass housing for middle-income buyers. Although hundreds of thousands of units were built, access has been uneven, and many households were excluded due to credit constraints. A Turkish civil servant explained: "People couldn't afford the payments. They had to move far from the city." In Brazil, the Minha Casa, Minha Vida was the only program having successfully expanded subsidized housing for the lower and intermediate middle class and played as a major enabler of homeownership, according to respondents. Still, the program has been scaled back in recent years, limiting its long-term impact.

The state's strategic neglect of the middle class, under the assumption of self-sufficiency, is thus a core tension at the heart of the provision dimension of current social contracts. Security, education, and health are three domains of provisioning systems highly relevant for middle class constituencies. Here also, a strong pattern of commodification is perceived and legitimated by all actors.

4.2 | Security, Education, and Health: Shared Priorities, Unequal Fulfilment

Across the countries studied, both public and private respondents emphasize the increasing commodification of essential services like education and health, particularly in Turkey and Brazil. These trends are especially pronounced in the housing, finance, and education sectors, where middle-class needs are often met through market-based solutions. In Côte d'Ivoire and Vietnam, such strategies are less developed due to shallower credit markets and the greater financial fragility of middle-income households.

Security emerges as a pressing issue for middle-class respondents, particularly in Brazil and Côte d'Ivoire, and even more so among the lower middle class. In Brazil, residents describe pervasive violence and the failure of public policing, which is perceived as either inefficient or complicit: "The police is slow, sometimes participating in the chaos." A similar sense of insecurity exists in Côte d'Ivoire, where youth gang violence—the "microbes" phenomenon—continues to plague neighborhoods. One Ivorian respondent summarized the sentiment bluntly: "The state has given up." As a result, gated communities are widely viewed as a middle-class aspiration, a market-based substitute for failed public safety institutions and missing public housing policies. However, only the upper middle class can typically afford such options, with others facing overindebtedness to access them. Although aspirations for private security are common in Brazil and Côte d'Ivoire, they are less mentioned in Vietnam and Turkey, where public security is not framed as a major concern. Still, across all four countries, distrust in public safety institutions remains a recurring theme.

Education stands out as the most urgent and consistently expressed concern across all middle-class groups. It is not only seen as a basic right but as the key to upward mobility, personal dignity, and long-term security. Middle-class families directly

associate their support for or discontent with the government with the quality and accessibility of education. In Côte d'Ivoire, one retiree remarked, "We do not train with slogans," whereas another emphasized: "Ouattara cannot do much about the prices of raw materials ... but he can choose to invest in research. It's my cry from the heart." Respondents across countries report deep dissatisfaction with underfunded and underperforming public education systems.

In Vietnam, middle-class respondents praise the government's reform efforts and infrastructure investment but remain concerned about overcrowding, low teacher quality, and the erosion of civic education. A parent noted, "My child knows how to calculate and do math but doesn't know how to behave," highlighting a perceived decline in values education. Most interviewees across all social strata prefer private education despite its high costs, up to three times those of public schools. A 43-year-old Vietnamese entrepreneur explained their choice: "In the youngest stage, the children will develop more physically ... this school is secure ... there are few students in a class, they participate in social activities."

Although Brazil and Turkey have somewhat better-performing public schools, dissatisfaction persists. Brazilian parents criticize the quality, fairness, and teaching standards in public schools, pushing even low-income families to opt for private alternatives. Many make substantial financial sacrifices: "We make this investment because we know that it will be reflected in the future," one father said. Turkey presents a more nuanced picture: privatization, and subsidies under the AKP have reshaped the landscape (Combarrous et al. 2019), but reliance on private education remains less widespread. There, the public-private divide is more generational, older families tending to accept public education, whereas younger ones increasingly seek private options.

From the supply side, education policy across all countries—except Côte d'Ivoire—has involved rising public spending over the past two decades. Nevertheless, these policies have sometimes backfired against the middle class. Public investments in higher education inadvertently excluded lower middle-class students, as improved standards of entry were not matched by better secondary education. Meanwhile, Turkey's proliferation of private universities led to what one private-sector respondent described as the "deskilling of university degrees," creating fears of future disappointment and a return to clientelism. These policies have also actively encouraged private sector growth. In Turkey, the AKP has consistently promoted private sector involvement in education (Combarrous et al. 2019), alongside subsidies for middle-class families (Asli Danis et al. 2019). In Vietnam and Côte d'Ivoire, education policy has largely focused on poverty alleviation and primary schooling (Berrou et al. 2018; Rougier et al. 2021), but the private sector increasingly targets middle-class consumers. In Côte d'Ivoire, this comes at a cost: Many households can only afford private schooling by cutting back on other forms of spending, according to household survey respondents.

This dual-track system—public for the poor and private for the middle class—is widely acknowledged by both policymakers and private providers. Public officials often recognize the growing

role of private schools but fall short of advocating stronger public alternatives. A Vietnamese public manager pointed out that "more than 80% of the population is still in public education" while acknowledging that wealthier families routinely opt out. Rural-urban divides further complicate the picture: "The gap between rural and urban areas is still huge," one expert noted. As public systems are increasingly abandoned by middle-class users, the result is a fragmented educational landscape: universalism in principle, but segmentation in practice.

Healthcare follows a similar trajectory. Middle-class respondents across all four countries value good-quality care but express deep dissatisfaction with public health systems. In Vietnam, most have public insurance but prefer private clinics for their speed and perceived higher quality. One civil servant summarized this trade-off: "They would rather pay for faster examination." In Côte d'Ivoire, the Universal Health Coverage (UHC) program is viewed with cautious optimism, but trust hinges on performance: "If I was offered to pay 1000 FCFA monthly per person, I would do it, but only if the health care system works." In Turkey, lower-middle-class households struggle to access private insurance, and public services are perceived as deteriorating. In Brazil, whereas most respondents are covered by public insurance, many express frustration: "We do not see where our contributions go," one said, echoing reluctance to pay more without tangible improvements.

These sentiments are echoed by institutional actors, who often regard the privatization of healthcare as inevitable. A Vietnamese respondent reflected the prevailing resignation: "Public hospitals are full, and private ones are growing. That's the reality." In all four countries, healthcare access is no longer widely seen as a public entitlement but as a market good, accessible to those who can afford it. Caught between out-of-pocket payments and ineffective public services, the middle class feels increasingly underserved and disillusioned.

A recurring concern among respondents is thus the gradual retreat of the state from its role as a welfare provider. Many policies are built on the assumption that middle-class households can manage on their own, justifying selective targeting and the privatization of services. But interviews suggest this logic is deeply flawed. Far from being self-sufficient, many middle-class families report vulnerability and growing anxiety over the lack of comprehensive public support. As one respondent said, "We want a state that delivers, not just retreats." Policies aimed at expanding opportunity, such as higher education or credit liberalization, have also had unintended consequences. In the absence of complementary regulations, these reforms have exposed households to greater financial risk or failed to ensure quality. For instance, housing credit schemes, while improving access to property, have increased household debt. In higher education, enrollment expanded but without ensuring employment or adequate academic standards, contributing to polarization within the middle class.

Underlying these frustrations is a growing sense of injustice around state accountability and fiscal fairness, a theme explored in the next section. But already, what emerges from the surveys is that the core of middle-class discontent lies in substance gaps, the failures of public institutions to deliver quality services. In

education, healthcare, and security, expectations remain high, especially among the lower middle class, but public provision often falls short. This results in excessive reliance on market alternatives, which exacerbates inequality and reinforces perceptions of a fraying social contract, one that no longer differentiates clearly between inclusion and exclusion across social groups.

5 | Protection and Redistribution Delivery: Scope Gaps

The middle class in many developing countries is frequently celebrated as a pillar of democratic consolidation and economic development. Yet, despite this rhetorical valorization, policies, particularly those related to social protection and redistribution, often fail to reflect or support their actual conditions, expectations, or vulnerabilities. Although governments praise the middle class in political discourse, their practical policy frameworks often overlook this group, leaving them caught between poverty-focused assistance and elite privileges. Drawing on insights from Brazil, Côte d'Ivoire, Turkey, and Vietnam, this section explores the growing gap between middle-class demands and the realities of current state responses, highlighting tensions over taxation, welfare, and governance.

In all four countries studied, middle-class respondents consistently express dissatisfaction with how fiscal policies are implemented. Although a minority views taxation as a civic responsibility, the dominant sentiment is one of disillusionment. Many feel overtaxed and underserved, with tax systems perceived as both opaque and regressive. The mechanisms of redistribution are often seen as favoring elites or the poor while neglecting the middle-income majority. Vietnamese respondents, for instance, rarely complain about income tax levels, but there is growing frustration over the weight of indirect taxes, especially consumption-related ones. This concern is more prominent among formal employers and the self-employed. As one 43-year-old transportation entrepreneur explained, “I do not say that it is wrong when collecting this, however the fee level is so high! In fact, people finally suffer from those fees and taxes ... if taxes and fees are low, we get lower price for a service; people do not have to spend much money for travel.” The sentiment reflects a recognition of tax as necessary but a frustration with its implementation and effect on daily life.

In Brazil, frustration is sharper and more widespread. Respondents often cite examples of excessive taxation on essential goods such as books, hygiene items, and matches, questioning why necessities are so heavily taxed while public services remain substandard. One respondent summed up the dominant feeling: “We pay too much and get too little.” This perception of an unfair exchange—high taxes with poor services—fosters distrust in government and a sense of systemic injustice. In Côte d'Ivoire, resistance to taxation is rooted in the belief that the fiscal system is illegitimate and disproportionately benefits elites. A 41-year-old university graduate and mid-level employee observed, “The country is split between those who take advantage of the system, and those who struggle hard.” This reflects not only discontent with tax burdens but also a broader disillusionment with governance and inequality. Turkish respondents,

while generally less vocally critical than their counterparts in Brazil or Côte d'Ivoire, also expressed concerns about the quality and privatization of public services. Although Turkey's social spending has expanded in recent years, the growing role of private providers and a perceived decline in public accountability have triggered unease among respondents.

Moreover, the middle class is not a homogeneous group with respect to their perception of protection and redistribution policies. There is a visible divide between upper and lower segments, each with differing needs and policy preferences. Upper-middle-class respondents—often professionals in the public or private sectors—tend to favor lower taxes and are more likely to rely on private healthcare and education. Conversely, lower-middle-class individuals, including small entrepreneurs, informal workers, and low-skilled employees, frequently demand more robust public investment and safety nets. In Brazil, respondents often described feeling “trapped” in a system that subsidizes the poor through cash transfers and the rich through tax breaks or elite services while leaving the middle class behind. In Côte d'Ivoire and Vietnam, similar feelings emerge, though often framed in terms of exclusion rather than entrapment. Here, tax regimes rely heavily on consumption taxes, income taxes contribute little to redistribution, and high informality leaves many without access to social protection.

Policy actors across these countries are not unaware of middle-class frustrations. Yet the response to their concerns has been limited, often consisting of marginal administrative adjustments or small-scale, narrowly targeted programs, according to supply-side government informants. Several middle-class responses also suggest that larger structural issues, such as equitable redistribution or transparent service delivery, remain largely unaddressed. This lack of engagement contributes to widespread dissatisfaction, especially in contexts where indirect taxation is high and redistribution through income tax is weak. Policymakers also realize relatively well that a significant source of grievance lies in the flawed targeting of social policies. Many programs focus narrowly on the poorest or on formally employed citizens, excluding a large segment of vulnerable, non-poor individuals who work informally or earn just above the poverty line. These individuals are often ineligible for assistance yet cannot afford contributions to formal social protection systems. The result is a policy vacuum where those in need of support receive none.

Both demand-side (supply-side) respondents also complain (acknowledge) that the rare public programs that aim to serve the middle class frequently fall short of expectations. Côte d'Ivoire's Universal Health Coverage (UHC) program, introduced in 2014, set contribution levels that many found unaffordable. Vietnam's 2007 Social Insurance Law was intended to extend coverage to private sector workers, yet made limited progress due to inadequate incentives and weak enforcement. Informal entrepreneurs and small employers often found themselves caught between high contribution thresholds and lack of meaningful coverage. Turkey's health reforms under the AKP, particularly the General Health Insurance scheme, aimed to ensure universal access. However, the increased role of private providers diluted the quality and accessibility of public services, especially for vulnerable

middle-class families. Minimum wage reforms also show uneven outcomes. In Vietnam, as of 2013, only 34% of workers were covered by minimum wage laws—mainly due to high informality. Policymakers often prioritized maintaining export competitiveness over improving labor protections. In Brazil, minimum wage increases during the 2010s contributed to poverty reduction, but macroeconomic volatility and unstable employment patterns limited their long-term impact. The secure upper-middle stratum benefits from both market and state systems, whereas a precarious lower tier remains highly exposed to shocks.

Corruption and poor governance further amplify discontent. In Brazil, Côte d'Ivoire, and Vietnam, corruption is viewed as endemic. For many, dissatisfaction goes beyond economic issues; it represents a deeper moral disillusionment with the state. Brazilian respondents described services as “inefficient, slow, and corrupted.” Ivorian and Vietnamese interviewees pointed to elite capture and favoritism, eroding public trust and tax morale. Although governments have launched anti-corruption campaigns, few respondents reported visible improvements in transparency or service quality. Efforts to support small entrepreneurs have also stumbled. In Côte d'Ivoire, simplified tax regimes and regulatory reforms were introduced, but implementation remained weak. A public official candidly noted: “The problem is not the intention but the capacity. We assumed too much self-reliance among informal entrepreneurs.” This gap between design and execution further alienates middle-class constituencies who might otherwise support reform.

Ultimately, both demand- and supply-side perspectives highlight a stark disconnect between the protection and redistribution aspirations of the middle class and the state's ability to meet them. These gaps are largely perceived by the middle class as gaps in scope, that is, in terms of exclusion from social programs and unfair and ineffective taxation. Across contexts, middle-class households feel overtaxed, underprotected, and undervalued. Fiscal and social policies rarely account for the internal diversity of this group or its critical role in development. Without more inclusive, accountable, and responsive reforms, the middle class risks becoming more fragmented and fragile, undermining its potential as a stabilizing force in emerging economies.

6 | Participation Delivery: Between Substance and Instability Gaps

From the previous sections, it happens that a central theme across the four-country study is the widespread sense of unmet expectations among middle-class respondents regarding public services, redistribution, and social protection. However, these expectations seldom translate into organized political demands or advocacy. The data reveal a paradox: Middle-class individuals articulate policy grievances with clarity, but they lack both the institutional platforms and the perceived agency to transform those concerns into collective action. Policy expectations thus seem to exist in a vacuum, formulated without genuine political channels through which they might be addressed.

This disconnect stems from two intertwined dynamics: individual disengagement on the demand side and institutional

bottlenecks on the supply side. Except in Brazil, middle-class respondents tend to view themselves primarily as taxpayers and consumers, not as political agents. Their role is defined in transactional rather than participatory terms, with little belief in their ability to influence public policy. Political engagement is notably low, especially among the “new” or more precarious segments of the middle class, informal workers, self-employed individuals, and low-wage earners. These groups often feel excluded from both redistributive schemes and institutional decision-making. In contrast, “historical” middle classes (e.g., public sector professionals, planters, and civil servants) maintain closer proximity to power and policy. This internal bifurcation reinforces unequal access to political influence.

The national context strongly shapes how these patterns manifest. In Vietnam and Turkey, respondents express dissatisfaction with governance and services but refrain from open dissent, possibly as they feel restricted by authoritarian controls or political co-optation (even if not explicitated by them). Public frustration is channeled into adaptation, as participation in local apolitical collective activities in Vietnam, and withdrawal rather than protest. In Côte d'Ivoire, political disengagement is underpinned by a mix of fatalism and the lack of credible alternatives, especially given that regime legitimacy is tied to developmental performance rather than democratic representation. Again, Brazil stands out here, as the broader civic space allows for stronger critique and mobilization. Respondents frequently report participating in protests or using electoral channels to express their views. Yet even in Brazil, middle-class mobilization remains fragmented, split along lines of ideology, geography, and class status.

Another recurrent theme is the privatization of political dissatisfaction. Even when grievances over taxation, public healthcare, or education are widespread, they are often addressed through private strategies such as opting out, investing in private services, or informal coping mechanisms. The default response is not to contest the state, but to circumvent it. As a result, the middle class appears politically active only at the margins, rarely as a unified actor pressing for institutional reform.

On the supply side, policymakers across all four countries appear to recognize the symbolic value of the middle class, but this recognition seldom translates into substantive policy engagement. Instead, our interpretation is that governments tend to instrumentalize the middle class rhetorically, invoking it to legitimize reforms, signal development, build electoral coalitions, or justify policy agendas. For instance, in Turkey, the AKP built an enduring alliance with conservative new middle-class groups (small business owners and religious professionals), marginalizing secular elites. In Côte d'Ivoire and Vietnam, middle-class rhetoric is used primarily for external signaling (e.g., attracting investors or donors), rather than for orienting domestic policy. In Brazil, although the middle class was central to the narratives of the Lula and Rousseff administrations at the time of the survey, policy engagement rarely addressed their core concerns over tax justice, service delivery, or labor insecurity.

This pattern of symbolic inclusion without structural commitment reinforces what could be described as “truncated citizenship” where middle-class status brings consumption rights but

not political leverage. Similar truncated citizenship has been described in non-democracies (Cammett et al. 2015; Cook and Dimitrov 2017). Our evidence suggest that they also characterize large parts of the middle class in democratic developing countries, although Brazil stands as an outlier in our (narrow) sample. Despite this, middle-class politics are not entirely inert. They are fragmented, strategic, and often mediated through alliances with other social groups or political actors. In Vietnam and Côte d'Ivoire, for example, the historical middle class remains loyal to incumbents, whereas newer informal segments lack both the channels and capital to advocate for redistributive reform. Across countries and subgroups, middle-class support can oscillate between illiberal retrenchment and inclusive reform, depending on perceived threats and political opportunity structures.

In sum, rather than functioning as a cohesive driver of democratic consolidation, the middle class in these contexts emerges as a fragmented, ambivalent, and politically instrumentalized constituency. Internal diversity, path-dependent trajectories, and regime-specific constraints all contribute to this complexity. This fragmentation reflects deeper path-dependent processes of middle-class formation, as emphasized by Clément et al. (2022) and Wietzke and Sumner (2018). In Turkey and Brazil, middle-class growth was linked to statist development models that have since shifted toward market liberalization. In Vietnam and Côte d'Ivoire, middle-class expansion emerged from public sector employment and agrarian rents, respectively. These diverse origins help explain the variety of policy preferences and political behaviors observed. Instead of forging unity, dividing lines between “old” and “new” middle classes fuel cleavages over redistribution, governance models, and political alliances. These dynamics not only challenge the normative assumptions of middle-class politics but also reveal the limits of performative policy narratives that celebrate the middle class without delivering meaningful change. Brazil remains a partial exception. Although protest participation and political critique are more common, even here, mobilization is not uniform. Segments of Brazil's vulnerable middle class have indeed turned to Bolsonaro's populist and anti-redistributive agenda, driven by a mix of status anxiety and anti-elite rhetoric (Gethin and Morgan 2021).

7 | Connecting the Dots: Situating Social Contract Gaps in the Literature

The empirical findings from Brazil, Côte d'Ivoire, Turkey, and Vietnam reveal persistent gaps between the expectations of middle-class households and the policy narratives offered by governments. These mismatches have been widely noted in the literature on welfare, redistribution, and state-citizen relations in low- and middle-income countries (Carnes and Lupu 2014; Schneider 2018), yet few studies explore them through the lens of both demand and supply-side dynamics as closely as this one. Our analysis sheds light on how the middle class navigates state disengagement, shifting from expectations of citizenship to individualized strategies shaped by consumption and market dependence.

In all four countries, middle-class respondents consistently express demand for core public services: education, health,

housing, and social protection. Yet, governments have largely retreated from providing these, adopting targeted programs or privatized models instead. Our interpretation is that middle-class groups are positioned as autonomous consumers rather than political stakeholders, forced to finance their own mobility. This policy approach benefits the upper-middle class while exposing more vulnerable segments to insecurity and unmet needs. Although not perceived as a “failure” from the supply side, this disconnect leaves many feeling underprotected and disappointed.

Crucially, the middle class is far from a unified political constituency. Our findings echo recent work that underscores the stratification within middle-class groups (Wietzke and Sumner 2018; Clément et al. 2022). Established professionals and state employees often seek tax relief and private options, whereas informal workers and low-income earners express resentment at contributing without access to services. This reflects what Holland (2018) and Birdsall et al. (2014) call “contributive injustice”: the sense of paying into a system without receiving reciprocal benefits. Many of these respondents fall into what Banerjee and Duflo (2008) and Ravallion (2010) term the “vulnerable middle class”: those just above poverty, with precarious jobs and limited social protections. Their social profile more closely resembles the poor than traditional elites (Bonnet and Kolev 2021; Clément et al. 2022). As they are often ineligible for pro-poor programs and excluded from formal protections, redistributive policies can bypass them altogether, sometimes even facing resistance from the very groups they are intended to support (Sumner 2016; Hoy and Mager 2022). Still, this group offers potential for cross-class coalitions if better recognized in policy design (Bonnet and Kolev 2021).

A core tension in our findings also lies between consumption and citizenship. Middle-class identity is increasingly defined by access to private goods—housing, credit, and education—but respondents also express normative expectations of public entitlements. These dual roles as consumer and citizen often conflict, especially under socioeconomic pressure. This reflects the broader debate over whether middle classes act primarily through the market or civic participation (Easterly 2001; Loayza et al. 2012; Birdsall 2015). In Côte d'Ivoire and Turkey, this contradiction largely contributes to truncated citizenship, where citizens are asked to be self-reliant while navigating deteriorating public services. These findings complicate the classical assumption, rooted in modernization theory, that middle-class expansion leads to democratization (Lipset 1959). Rather, our data support critiques by Hattori and Funatsu (2003), Chen (2013), and Sumner (2016), showing that middle-class actors in semi-authoritarian or weakly democratic settings often prioritize material security over institutional reform. In Turkey and Vietnam, respondents acknowledge discontent but avoid systemic critique. Their deference to economic performance, order, and personal advancement over rights-based claims reflects a pragmatic trade-off identified by Brown and Jones (1995) and Eibl (2020). This trend mirrors patterns observed in Pakistan (Blair et al. 2011) and post-Soviet states (Rosenfeld 2020), where middle classes may support authoritarianism or political violence under perceived threats. Similarly, Mattes (2015), Resnick (2015),

Schaffar (2018), and Wietzke and Sumner (2018) note that middle classes across the Global South often value stability more than democratic deepening.

Governments often reinforce this political apathy through strategic neglect. Our interviews reveal that officials typically view the middle class as politically unthreatening and economically self-sufficient. As a result, policy attention is focused on targeted support for the poor or incentives for the wealthy. This reflects Stigler's (1970) theory of selective policy capture, developed by Acemoglu and Robinson (2006) and Lupu (2024): that elites use public institutions to maintain control while sidelining middle and lower-income citizens. This also reflects limited responsiveness on the supply side of policymaking (Lupu and Warner 2022; Burgoon et al. 2022), with public policies responding less to middle class needs than to those of the wealthiest. In the setting of our study, middle class respondents even point to something akin to polarized responsiveness, as they view social policies as benefitting essentially the poor and the fiscal and liberalization ones are advancing the rich. This polarized responsiveness notably takes the form of a form of "laissez-faire paternalism" claiming to empower the middle class through credit and consumer options, while deflecting structural responsibilities. The rise of privatized education, healthcare, and housing reflects this logic (Campello 2016; Holland and Schneider 2017; De La O et al. 2023).

In this landscape, perceived fiscal injustice becomes a major grievance. Respondents across Brazil, Vietnam, and Côte d'Ivoire frequently cited frustration with contributing to systems that yield little in return, a "no representation without services" sentiment (Holland 2018). With tax burdens skewed toward consumption and welfare programs fragmented, a "missing middle" emerges: too rich for aid, too poor to opt out. This confirms earlier observations by Mares and Carnes (2009) and Hoy and Mager (2022) on how welfare architectures exclude informal or semi-formal workers. For instance, in Brazil, universal health and education are seen as compromised by elite capture. In Vietnam and Côte d'Ivoire, underfunded schemes fail to meet coverage thresholds. In Turkey, the shift toward privatization has narrowed public access. In each case, inequality, not poverty per se, is the root of middle-class discontent (Palma 2011; Sumner 2016).

Despite frustrations, middle-class disengagement rarely translates into mobilization. Instead, respondents often describe retreating from the public sphere—not from apathy, but from a learned sense of cynicism. Many seek to avoid the state rather than reform it. This supports the argument by Pontusson and Weisstanner (2017) and Burgoon et al. (2022) that redistributive coalitions have eroded, whereas populist or anti-establishment appeals gain traction (Burgoon et al. 2019; Pereira 2023). Studies by Sinpeng and Arugay (2015) and Schaffar (2018) further show that where democratic institutions fail to respond, middle-class voters may embrace authoritarian or illiberal alternatives—especially amid rising costs and stagnant mobility.

Trust deficits further deepen social contract erosion. Although many support taxation and public provision in principle, concerns about corruption, inefficiency, and elite capture dominate interviews. These concerns echo long-standing findings

linking governance failures to social contract breakdowns (Huber and Stephens 2001; De La O et al. 2023). Statements like "the state has given up" reflect the fatalism and frustration that Wietzke (2019) identifies as central to declining fiscal legitimacy. Importantly, policymakers and market actors often perceive a functioning contract where citizens do not—further fueling disillusionment. Nonetheless, many respondents remain committed to the idea of the state. Contrary to common assumptions, their disengagement does not signal ideological preference for small government. Instead, frustration stems from exclusion and unmet promises—echoing Birdsall et al. (2014) and De La O et al. (2023), who argue that opposition to state programs often reflects structural exclusion more than anti-statism. This suggests potential for future coalitions, particularly if inclusive reforms can restore trust. Yet, as Lupu (2024) and Wietzke and Sumner (2018) warn, doing so would require dismantling elite biases and making the state visibly accountable again.

Finally, supply-side actors acknowledge the risks of neglecting the middle class, especially around debt, social fragmentation, and political volatility. However, few countries have outlined clear strategies to re-engage this group. Most remain invested in market-led growth, overlooking the growing disconnect between economic performance and public legitimacy.

8 | Conclusion

The evidence from Brazil, Côte d'Ivoire, Turkey, and Vietnam reveals a fractured social contract. Our findings and the broader literature reveal a mismatch between the ideals of the social contract and policy delivery. The middle class is fragmented and insecure, shaped by economic instability and institutional constraints. On the demand side, middle-class households seek fiscal fairness, effective public services, and social protection, not as entitlements, but as foundations for economic and social stability. However, governments often deliver policies that are inconsistent, underfunded, or poorly targeted, shaped by fiscal constraints, institutional weaknesses, and political trade-offs. This misalignment between public expectations and policy outcomes risks undermining trust, reinforcing inequality, and eroding support for democratic governance.

Our analysis reveals that the middle class in developing countries is experiencing growing frustration due to a persistent gap between their expectations for public services, social protection, and political participation and the actual policies delivered by states. This disconnect results in a fragile, incomplete social contract characterized by "laissez-faire paternalism" and "truncated citizenship," weakening middle-class support for reform and risking future political instability. Still, most governments continue to treat them as market participants, ignoring their calls for fairness and inclusion.

Governments must urgently shift from treating the middle class as mere consumers and credit users toward recognizing and institutionalizing them as full political and social stakeholders; this requires rebalancing social contracts by investing

substantively in public services, expanding social protections beyond the poorest groups, enhancing fiscal fairness, and enabling more inclusive political participation, in order to restore trust, prevent social fragmentation, and foster resilient democratic and economic development. To bridge the demand–supply gap, a rethinking of the middle class is also needed, not as a homogenous bloc, but as a group with diverse claims to social rights. Governments in the Global South have failed to institutionalize middle-class concerns, leading to a fragmented and incomplete social contract. To address this gap, the state must shift from a minimalist role of managing poverty to a proactive role as a guarantor of opportunity, fairness, and social cohesion. Without this shift, frustration within the middle class will likely deepen, leading to greater social fragmentation and eroding trust in democratic institutions. The resulting instability could undermine the very foundations of middle-class support for economic development.

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Data Availability Statement

The data that support the findings of this study are available on request from the corresponding author. The data are not publicly available due to privacy or ethical restrictions.

Endnotes

¹For the sake of article size, we deliberately leave aside the stability dimension because it is less central than the two others. Yet, this stability dimension would deserve a full analysis, notably in the context of political regime changes.

²The 2014 PNAD survey (Pesquisa Nacional por Amostra de Domicílios) implemented by IBGE (Instituto Brasileiro de Geografia e Estatística) for Brazil, the 2015 ENV survey (Enquête sur le niveau de vie des ménages) implemented by INS (Institut National de la Statistique) for Côte d’Ivoire, the 2014 SILC survey (Survey on Income and Life Conditions) implemented by Turkstat (Turkish Statistical Institute) for Turkey, and the 2012 VHLSS survey (Viet Nam Household Living Standard Survey) implemented by the GSO (General Statistics Office of Vietnam) for Vietnam.

³Our aim is not to pinpoint the exact size of the middle class, but to define a middle-income group consistent with existing estimates. To ensure comparability, we test and contrast commonly used income intervals from the literature.

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Supporting Information

Additional supporting information can be found online in the Supporting Information section.