

Uganda's Rising Middle-Class: A Roaring Lion or a Sleepy Kitten?

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A Country Report

Several authors write about Sub-Sahara's rising middle class as "African Lions"¹ with the potential to drive prosperity². But how does the potential of Africa's Middle Class really look like? Is a 'rising African middle class' overhyped? When describing the economic development of a country, one of the key parameters is looking at the distribution of different income classes, since they provide a lot information about the actual disposable income and economic reality of the population in comparison to the GDP or other macroeconomic measures.

Of special interest is the middle class, which consist of people with a middle income who are neither rich, nor poor, neither at the top nor at the bottom of society. Increasing the relative percentage and the income level of the middle class is generally implicit to most government actions and policies, if not an explicit reason of state. It is closely linked to economic growth, to the extent that these terms are sometimes conflated in public use.

Whether Africa's middle class is rising or not, the relevance of a vibrant middle-class cannot be underestimated for socio-economic and political and development. Writing more than 2,000 years ago, the Greek classical philosopher Aristotle argued that a strong middle-class fulfils five major roles, namely; the middle class obeys reason and appreciates knowledge; they are best suited to rule and be ruled; they keep a regime stable and in check; they also make it harder to separate the people into competing factions and the best legislators usually come from the middle-class³.

In Uganda, creating a robust middleclass has been a major and conscious policy, especially under the current NRM regime as evidenced in President Museveni's statement while introducing the Second National Development Plan (NDP) 2015/16 – 2019/20. "I believe that Uganda will steadily move towards middle income status and greatly attain improved standards of living for the majority of the citizenry by 2020"⁴, he wrote. In fact, achieving a middle-income status became NRM government's underlying manifesto mantra for the 2016 elections. With the deadline just a few months away, critics and even policy makers driving the Uganda middle-income attainment agenda are becoming pessimistic. While critics argue that high debts, low revenue collection, low and unstable growth continue to thwart the middle-income prospects, the government also agrees that although progress is being made, the 2020 middle-income attainment deadline still remains a wild-goose

¹ Hendrik van Blerk, "African Lions: Who Are Africa's Rising Middle Class?," *IPSOS Review*, no. 15 (2018).

² Landry Signé, "Africa'S Emerging Economies to Take the Lead in Consumer Market Growth," accessed August 20, 2019, <https://www.brookings.edu/blog/africa-in-focus/2019/04/03/africas-emerging-economies-to-take-the-lead-in-consumer-market-growth/>.

³ Aristotle and C.D.C. Reeve, *Politics* (Indianapolis: Hackett Publishing Company Inc, 2009).

⁴ The Republic of Uganda, "Second National Development Plan (NPDII) 2015/16 – 2019/20" (2015).

chase⁵. Indeed, this progression into a middle-income economy status also signals a rising middle class in Uganda.

But who belongs to the middle class social strata in Uganda? How is the current situation of Uganda's middle-class? What economic opportunities does the middle class of Uganda bring along? What are the challenges of a growing middle class? How do we tap more benefits from an ascending middle class? This country report provides more nuanced reflections about these questions.

Sub-Saharan Africa's middle class is growing

Various authors speak of an ascending middle class⁶⁷ or even of "African Lions"⁸ as a "a vast source of potential for prosperity"⁹. But who, by definition, belongs to Africa's middle class? In addition to relative approaches to determination, e.g. the number of all persons between the 20% and 80% percentile of the consumption distribution¹⁰, there are various absolute determination approaches. The African Development Bank uses a daily per capita income between USD 2 and USD 10¹¹¹² to determine the middle class of sub-Saharan Africa. According to this criterion, the African middle class comprises 350 million people (in 2010) and has a growth rate of 3.1% from 1980 to 2010.¹³ However, the sole use of certain purchasing power or income values is problematic. The level of purchasing power is not only determined by a certain disposable per capita daily income, but also depends to a large extent on food prices, which vary greatly from country to country¹⁴. As a result, some authors have added further determination criteria.

Thurlow et al (2015) name three basic criteria that must be fulfilled in order to fall into the category "middle class".¹⁵

- „1. Secondary schooling completion
2. Decent Housing
3. Qualified Employment“¹⁶

Van Blerk adds a disposable income to the above criteria, of which no more than 75% has to be used for the daily provision of the household.¹⁷

Who belongs to the Ugandan Middle Class?

In order to find out who belongs to Uganda's middle class not only financial measures but also citizen's perceptions should be taken into account. Milton Ayoki argues, that a monetary definition of the middle class needs to fit to the local context of a country and proposes to use consumption levels adapted to the local conditions of each country under consideration. The definition of the middle class by the African Development Bank consisting of people who earn between 2 and 10 \$ does not fit the local circumstances of Uganda. The proposed per capita consumption thresholds

⁵ URN, "Uganda Can't Achieve Middle Income Status by 2020 - Minister," accessed August 23, 2019, <https://observer.ug/news/headlines/59022-uganda-can-t-achieve-middle-income-status-by-2020-minister>.

⁶ Christian Kingombe, "Africa's Rising Middle Class Amid Plenty and Extreme Poverty" (Discussion Paper, 2014).

⁷ Milton Ayoki, "Uganda'S Emerging Middle Class and Its Potential Economic Opportunities" (Institute of Policy Research and Analysis, 2012).

⁸ van Blerk, "African Lions: Who are Africa's rising middle class?"

⁹ Ercia Pandey, "Africa's Growing Middle Class Drives Prosperity," accessed August 19, 2019, <https://www.axios.com/africas-growing-middle-class-is-a-source-of-pros-1516452641-9f257787-0cd6-403c-b7dc-954f078e24f6.html>.

¹⁰ N. Birdsall, C. Graham, and S. Petti-Nato, "Stuck in Tunnel: Is Globalization Muddling the Middle?" (Working Paper 14, Washington DC, 2000).

¹¹ Maurice Mubila and Mohamed-Safouane B. Aissa, "The Middle of the Pyramid: Dynamics of the Middle Class in Africa" (Market Brief, 2011).

¹² Abhijit V. Banerjee and Esther Duflo, "What Is Middle Class About the Middle Classes Around the World?," *Journal of Economic Perspectives* 22, no. 2 (2008).

¹³ Mubila and Aissa, "The Middle of the Pyramid: Dynamics of the Middle Class in Africa"

¹⁴ van Blerk, "African Lions: Who are Africa's rising middle class?"

¹⁵ James Thurlow, Danielle Resnick, and Dumebi Ubogu, "Matching Concepts with Measurement: Who Belongs to Africa's Middle Class?," *Journal of International Development* 27, no. 5 (2015), <https://onlinelibrary.wiley.com/doi/full/10.1002/jid.3105>.

¹⁶ Ibid.

¹⁷ van Blerk, "African Lions: Who are Africa's rising middle class?"

at the lower end of 2\$ do not reflect the costs of living a moderate lifestyle in Uganda in terms of housing, food, care, transport, medicine, education, etc..¹⁸

In a survey of members of government institutions, the private sector, academia, various research institutions, the media and the general public, a consumption level of 1 million Uganda Shilling (UGX) to 5 million UGX was found to be appropriate for the definition of the middle class.¹⁹

Ayoki gives the following example for a lower middle class citizen with a disposable income of 1 million UGX, we can spend 450,000 UGX for monthly rent, 80,000 UGX for electricity and coal, 6,000 UGX for daily transport to work, 6,000 UGX for daily lunch at work and 150,000 for food at home monthly, 50,000 for monthly medical expenses. School fees are not included in this calculation.²⁰

To define Uganda's middle class it is relevant to additionally consider citizen's perceptions about the middle class and its characteristics. "The best way to know who is middle class in Uganda is to ask people themselves."²¹, argues Ayoki. According to informants' opinions a typical member of the middle class owns a car, can afford leisure activities and send their children to private schools, has various income sources, is educated up to diploma or university level, shops in supermarkets and is less politically interested.²² The middle class therefore attaches great importance to decent housing, education, health services, shopping, comfort, assets and infrastructure.²³ Consequently it is important to not only define the middle class by disposable income.

How did Uganda's middle class develop?

In the following the evolution of Uganda's middle class will be described and the topic will be approached by giving some figures. The importance of the middle class in Uganda results above all from the fact that it is growing faster than the population as a whole²⁴. In order to understand this development, a brief description of the historical background is helpful before looking at future predictions.

In the post-independence period from 1962 – 1970 Uganda's industry sector was booming, the population size was still small and therefore employment rates were high with a middle class amounting 10% of the population. With the Regime's of Amin and Obote many middle class professionals and businesses left the country and with them various job opportunities disappeared. With the takeover of power through the NRM Administration and their economic stabilisation policies the middle class could slowly recuperate again.²⁵

Data from Uganda national household surveys proves that the percentage of the population earning more than 1,000,000 UGX and therefore belonging to the middle class increased from 1% in 1992/93²⁶ to 8.4% in 2012/13²⁷. this figure (4.1 percent of the population) may seem small, the importance of Uganda's emerging middle class is due to the fact that it is growing faster than the population as a whole.²⁸

If you have a glance at other indicators of a rising middle class like the acquisition of used cars or the dissemination of supermarkets a considerable increase can also be observed there.²⁹ Various supermarket chains are constantly opening new branches and are able to sell expensive items such as washing machines etc. and who can afford these items if not a rising middle class?

However, there are considerable regional differences. Whereas the percentage share of citizens earning 1 million UGX and above in Central Uganda counts 13.8%, it counts only 7.3 in Western, 5.1 in Eastern and 3.6 in Northern Uganda.³⁰

¹⁸ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

¹⁹ Ibid.

²⁰ Ibid.

²¹ Ibid.

²² Ibid.

²³ Ibid.

²⁴ Ibid.

²⁵ Ibid.

²⁶ Ibid.

²⁷ Mungyereza, Ben Paul et al., "Uganda National Household Survey 2012/2013" (Kampala, 2014).

²⁸ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

²⁹ Ibid.

³⁰ Mungyereza, Ben Paul et al., "Uganda National Household Survey 2016/17 Report" (Kampala, 2018).

Overall, the most striking aspect is the discrepancy between urban and rural regions. In urban areas the percentage share of people earning more than 1 million UGX amounted up to 23.5%, while it was only 5.3% in rural areas.

When examining the demography of Uganda's middle class a gender gap is noticeable. Three thirds of the middle class are male.³¹

Even though there are major regional differences the middle class is on the rise and the rise is additionally reflected in non-monetary indicators, such as the popping out of supermarkets.

Opportunities of a rising middle class

a. High Demand for goods and services

Many researchers see the Sub-Saharan Rising Middle Class as a "pillar for economic growth" and expect growth through increasing consumption of goods and services.³²³³³⁴ McKinsey predicts that fast-growing cities in emerging markets will be filled with millions of new and increasingly wealthy consumers creating a new growth market for global businesses, while much of the developed world will experience slower growth due to aging.³⁵ Apart from that a World Bank analysis shows that middle class households are likely to spend more on private education and health. Africa is now in the age of consumerism with prediction of being the world's leading consumer market by 2050. This is fueled by interrelated social and demographic changes that drive the continent's growth engine, urbanization and the rise of the middle-class African consumer, whose numbers have tripled during the course of the last 30 years.³⁶

In Uganda, the private consumption by households and private firms has increased 8-fold since 1989.³⁷ The middle class in general spends more disposable income than any other income group which leads to a demand on goods and services of billions of \$ in Uganda and which is predicted to reach \$2.5 trillion in whole Africa by 2030³⁸. Besides that, the actual purchasing power is often still underestimated, as most people have income from property in addition to their main activity or pursue other smaller business activities in addition to their main activity.³⁹

Thus, the middle class is capable of sustaining a strong demand base for products and enable growth in sales.⁴⁰ Particularly the communication service sector, the financial service and the expensive high quality private education sector may benefit greatly from a growing middle class.⁴¹ For this reason an increasing demand does not only benefit the local economy through an increase of domestic consumption, but also the African domestic market as well as mainly Asian traders.⁴²

b. Expanding the Human Capital Base and Promoting Innovation

One of the tickets of entry to the middle class segment is an attainment of certain level of education, usually post-secondary school level. Naturally, educated parents will always ensure that their children also attain similar or more advanced levels than they did because they view education as the surest way to break out of the poverty trap. This dynamic results into a literate society in possession of critical skillsets and knowledge which are key pillars for advancing better well-being and promoting innovation. Innovativeness leads to the creation of a supportive ecosystem for entrepreneurship to thrive. Indeed, Uganda' innovation ecosystem, especially in Kampala has been rapidly growing in the recent past.

³¹ Mungyereza, Ben Paul et al., "Uganda National Household Survey 2012/2013"

³² Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

³³ Mubila and Aissa, "The Middle of the Pyramid: Dynamics of the Middle Class in Africa"

³⁴ van Blerk, "African Lions: Who are Africa's rising middle class?"

³⁵ Charles Roxburgh, Norbert Dörr, and Acha e. a. Leke, "McKinsey Global Institute (2010) Lions on the Move: The Progress and Potential of African Economies, McKinsey & Company." (McKinsey Global Institute, 2010).

³⁶ Ibid.

³⁷ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

³⁸ Signé, "Africa's emerging economies to take the lead in consumer market growth"

³⁹ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

⁴⁰ Ibid.

⁴¹ Ibid.

⁴² Mubila and Aissa, "The Middle of the Pyramid: Dynamics of the Middle Class in Africa"

c. A Bastion for Civic-Engagement and Democratic Deepening

One of the Aristotle's central arguments in his seminal work *Politics* was that democracy only functions in a society with a thriving middle-class. He warned that the disappearance of a middle-class inadvertently also leads to the disappearance of democracy. On the other hand, with a majority middle class, democracy works, and it works well⁴³. Why? Because the middle class tends to be educated and has just enough prosperity that members of that class can see themselves becoming rich someday, so they don't punish the rich, and they have compassion for the poor, being that many of them came from poverty⁴⁴. Uganda's political history is dotted with examples about struggles by the middle class to challenge oppression and injustices. For instance, the independence struggle was championed by trade unions and cooperative societies whose members were largely the middle class section of the society at the time.

Challenges of a rising middle-class

A rising middle class comes along with credible challenges. Although several researchers including business consulting groups such as McKinsey predict a various spectrum of opportunities through a rising middle class the challenges which come along with an ascending middle class should not be denied but taken into account when trying to wake 'the sleeping lion' of Uganda's middle class.

a. Population growth and a rising middle class lead to under- and unemployment

Firstly, a growing population in combination with a rising middle class can lead to tensions on the labor market and thus to under- and unemployment. The African population is growing rapidly and there is no historical precedent in the world where this type of population growth is experienced. This means that 10 million jobs must be created per year to avoid unemployment and underemployment.⁴⁵ Economic opportunities have created a potentially explosive social problem in many African cities, including Kampala, especially given the particularly high levels of youth under- and unemployment. Authors warn of a "lost generation" of young qualified people that could stoke tensions in society due to high unemployment and precarious job situations, hampering their efforts to build a future.⁴⁶ Apart from that uncertain job conditions create insecurity and even minor fluctuations in the exogenous framework conditions are sufficient for a person to return to the "Poor Class".⁴⁷

b. Challenges for service provision

Secondly, a rising middleclass poses a huge challenge for service provision. There is not enough capital to provide the rising needs for services such as health care, education and financial services. Therefore, large investments have to be funded, yet at the same time the most vulnerable in society need to be protected from slipping into poverty.⁴⁸ The rising Ugandan middle class already puts pressure on infrastructure, services and housing.⁴⁹ A rising price level for services, as well as land and aliments, due to a growing demand from the middleclass affects the middle class as well as the poorest of the population.⁵⁰

c. Challenges because of rural-urban migration

Apart from economic and social consequences, a rise of the middleclass and their migration to urban areas causes pressure on ecosystems in form of water, air and noise pollution in urbanized areas. Especially in the growing informal parts of the cities, where there is no planned infrastructure, environmental impact poses a risk on the citizens' wellbeing.⁵¹ In addition to that the suburbs of

⁴³ Charles Como, "Why Inequality Matters – Aristotle and the Middle Class," accessed August 23, 2019, <https://underground.net/aristotle-and-the-middle-class/>.

⁴⁴ Ibid

⁴⁵ Kingombe, "Africa's Rising Middle Class amid Plenty and Extreme Poverty"

⁴⁶ Ibid.

⁴⁷ van Blerk, "African Lions: Who are Africa's rising middle class?"

⁴⁸ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

⁴⁹ Ibid.

⁵⁰ Kingombe, "Africa's Rising Middle Class amid Plenty and Extreme Poverty"

⁵¹ Mediel Hove, Emmaculate T. Ngwerume, and Cyprian Muchemwa, "The Urban Crisis in Sub-Saharan Africa: A Threat to Human Security and Sustainable Development," *Stability: International Journal of Security and Development* 2, no. 1 (2013).

Kampala need to deal with encroachments on wetlands as a consequence of urban sprawl.⁵² That can also be seen as a result of scarce resources such as land and housing, which proves that service provision for a rising middle class poses a severe challenge. Lastly a rising middle class brings along serious adverse environmental impacts through an increasing carbon-footprint. In the long run, a rising middle class will be accompanied by negative effects on the environment which need to be muted.

d. Income inequality

The data from the National Household Survey 2016 show, that there is there has been increase in income equality from 2012/13 up to now. Especially in the urban region of Kampala the Gini-coefficient, which is used to measure income inequality raised from 0.34 to 0.41.⁵³ A Gini-coefficient of 0.41 could be interpreted as 59% of the population sharing all the income and the rest receiving nothing. This shows, that if talking of a rising middle class you should not forget that the middle class rises amid plenty and extreme poverty and not the whole population benefits of that rise.

That comes along with social externality, which means an increasing trend of evicting or relocating large numbers of urban poor and leave them without access to vital services and livelihood opportunities.⁵⁴ Besides, the gap in access to quality education between urban and rural areas, and between central and other regions, withheld a large number of citizens in remote areas, of the chances to seek upward social mobility. In this manner people from remote regions are kept away from joining the middle classes.⁵⁵

According to the World Economic Forum a diverging gap between rich and poor is the most probable threat to our global economy in future. The WEF warned of a generation of young people that could cause tensions because of their precarious situation in un- and underemployment. "People are just not going to stand for it anymore," said Jennifer Blanke, chief economist at the World Economic Forum. "It's really eroding at the social fabric."⁵⁶ In the long run the reduction of income inequality plays a crucial role in the ascent of the middle class.⁵⁷

Uganda's middle class in the East-African context

If you compare the middleclass situation of Uganda, Kenya and Rwanda, Uganda's middle class is the worst off among the countries according to a study implemented by Thurlow et al.⁵⁸ Less than 8% per cent of the population at \$4 or more per day meet the above mentioned three conditions of a middleclass.⁵⁹ The at or above daily per capita expenditure level in Kenya is higher than in Uganda and Kenya is therefore frequently cited as having a sizeable and growing middle class.⁶⁰ However, in that country which is viewed as having a booming middle class because of its larger consumer potential, only 12.2% percent of the middle class in absolute expenditure terms actually have the combined housing, employment and education profiles that would constitute the basic minimum for meeting a middle class lifestyle.⁶¹ In Rwanda the number of households with \$4 or more per capita expenditure per day is even lower than in Uganda with a percentage of 4.9%.⁶² The percentage of the population to meet the three criteria to belong to the middleclass is 9.1% and thus higher than in Uganda.⁶³

⁵² Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

⁵³ Mungyereza, Ben Paul et al., "Uganda National Household Survey 2016/17 Report"

⁵⁴ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

⁵⁵ Ibid.

⁵⁶ The Associated Press, "Rich/poor Gap the Biggest Threat to Global Economy: Davos," accessed August 20, 2019, <https://www.cbc.ca/news/business/rich-poor-gap-the-biggest-threat-to-global-economy-davos-1.2498942>.

⁵⁷ Kingombe, "Africa's Rising Middle Class amid Plenty and Extreme Poverty"

⁵⁸ Thurlow, Resnick and Ubogu, "Matching Concepts With Measurement: Who Belongs to Africa's Middle Class?"

⁵⁹ Ibid.

⁶⁰ Ibid.

⁶¹ Ibid.

⁶² Ibid.

⁶³ Ibid.

Table 3. Population characteristics at \$4-a-day or higher per capita expenditure, mid-2000s

	Share of this population group who... (%)					
	Share of population (%)	Live in urban areas	Meet the following 'middle class' criteria...			
			Housing	Work	Education	Composite
Zambia	6.1	87.3	62.1	78.1	83.4	52.6
South Africa	35.8	82.2	78.6	85.2	60.3	47.6
Malawi	2.1	66.2	53.2	57.5	40.1	33.7
Mozambique	4.5	77.0	39.9	62.0	38.0	21.7
Nigeria	2.5	72.9	21.1	66.1	62.4	15.9
Ghana	14.2	74.3	24.3	69.2	39.4	14.3
Kenya	10.9	64.8	39.7	65.3	20.2	12.2
Rwanda	4.9	68.1	13.9	53.0	40.0	9.1
Uganda	6.9	58.9	10.1	65.5	44.1	7.2

Source: Own calculations using national household survey data (see Table 1).

Notes: 'Work' is attained if head or spouse is employed outside of farm, trading or manual labourer occupations.

'Housing' requires piped water, electricity and flush toilet. 'Education' is attained if head or spouse has completed secondary school. 'Composite' is if household meets all of the work, housing and education criteria.

Table 1: Population characteristics at \$4-a-day or higher per capita expenditure, mid-2000s (Source: Thurlow, Resnick et al. - Matching Concepts With Measurement: Who Belongs to Africa's Middle Class?)

Conclusion – What measures must be taken to benefit from a rising middle class in Uganda?

Uganda's middle class still holds a small share of the country's population with 8%. Therefore, Museveni's aspiration to bring Uganda to a middle income status with an average per capita Gross National Income of \$1,038 by next year is severely unrealistic. On the bright side, the data show that Uganda's middle class is constantly growing and thus a rising middle class goes along with a rising level of purchasing power. To depress the challenges which come along with an ascending middle class Uganda needs to succeed in controlling the population growth which remained stubbornly high in order to guarantee enough employment opportunities and thus curb social inequality as well as guarantee stability. Apart from that, investments in human resource development are requisite to reach a higher level of productivity and to create human capital that matches the needs of the labor market.⁶⁴⁶⁵ Additionally, social protection mechanisms should also be put in place to reduce chances of middle-class sections being thrown back to poverty.

⁶⁴ Ayoki, "Uganda's Emerging Middle Class and its Potential Economic Opportunities"

⁶⁵ Elisa van Waeyenberge and Hannah Bargawi, "Macroeconomic Policy, Inclusive Growth and Productive Employment in Uganda" (2018).

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