The Making and Remaking of the European Middle Class: A Social History, 1500-Present

Anand Kumar Keshavan

Abstract

This monograph examines the complex and contested evolution of the European "middle class" from the early modern period to the contemporary era. It argues that the very concept of a "middle class" is not a static analytical category but a dynamic historical construct, its definition, composition, and societal role undergoing profound transformations across five centuries. Beginning with the legally defined urban strata of the 16th century – the burghers, artisans, and merchants often termed the "middling sort" – the analysis traces the emergence of the bourgeoisie as a self-conscious political and cultural force during the Enlightenment, propelled by new economic activities and revolutionary ideals. The Industrial Revolution further reshaped these intermediate groups, massively expanding their numbers while simultaneously diversifying them into distinct segments, from the haute bourgeoisie of industry and finance to the growing ranks of professionals and white-collar employees. The post-World War II era witnessed the apparent consolidation of a broad middle class underpinned by economic growth and the expansion of the welfare state, yet this period also sowed the seeds for future fragmentation. Subsequent decades marked by deindustrialization, economic restructuring, globalization, and technological change have led to new patterns of inequality, precariousness, and social mobility, challenging the coherence and stability of the middle class in contemporary Europe. Drawing on frameworks from social history and sociology, and grounded in established scholarship, this study explores the interplay of economic structures, political agency, social status, and cultural identity in the making and remaking of this pivotal, yet perpetually fluid, social formation. It adheres to rigorous academic standards and employs the Harvard citation style.

Introduction

The Problem of Defining the "Middle Class" in European History

The term "middle class" occupies a central position in social, political, and economic discourse, yet its application across the vast expanse of European history presents significant conceptual challenges (Pressman, 2007). As a category, it refers generally to those situated in the middle of a social hierarchy, but the criteria for this positioning – whether occupation, income, education, social status, or cultural values – have varied dramatically over time and according to analytical perspective (Pressman, 2007). The modern usage, often tied to income metrics (such as the middle quintile, households earning 75-200% of median income, or specific income brackets) or socio-professional categories (professionals, managers, white-collar workers), emerged relatively late, arguably solidifying only in the early 20th century (Mills, 1951).

Applying this modern term retrospectively, particularly to periods before the 19th century, risks anachronism. Historical actors did not necessarily perceive themselves as belonging to a "middle class" in the way the term is understood today. Instead, contemporary terminology reflected the prevailing social structures. In the early modern period, terms like "burgher" (townsman), "bourgeoisie" (originally town-dweller), or the more ambiguous "middling sort" were more common (Mills, 1951). The term "bourgeoisie," while later adopted by Marxist theory to denote the capitalist class owning the means of production, initially held a more literal meaning tied to urban residency and specific privileges (Marx and Engels, 1848). There is a discernible tendency in historiography to favor terms like "bourgeoisie," "burgher class," or "the middling sort" for the pre-industrial era, reserving "middle class" or "middle classes" for the period after industrialization (Encyclopedia.com, 2023). This evolution in terminology itself underscores the changing nature of social stratification and self-perception.

Even within specific eras, definitions remain contested. Economic definitions based on income thresholds offer comparability but can obscure significant differences in lifestyle, security, and status within that income band (Mills, 1951). Sociological definitions, focusing on factors like education, professional qualifications, belief in certain values (e.g., home ownership, delayed gratification, work ethic), lifestyle, or cultural capital, offer richer texture but can be harder to operationalize consistently across time and space (Mills, 1951). Max Weber's distinction between class (economic position), status (social honour), and party (political power) provides a crucial framework for understanding that "middle" positions are multi-dimensional (Weber, 1978). Furthermore, the notion of a single, unified middle class has been questioned, with some historians and sociologists arguing it is more accurate to speak of multiple, often fragmented, "middle classes" with divergent interests and identities (Mills, 1951).

This definitional fluidity is not merely an academic inconvenience; it reflects a core reality. The "middle class" is not a static entity with fixed boundaries but a historically contingent social construct. Its meaning and composition are shaped by the dominant economic system (feudalism, mercantilism, industrial capitalism, post-industrialism), the prevailing political order (estates system, absolutism, liberal democracy, welfare state), and the cultural frameworks through which social difference is understood and expressed. Crucially, its identity is relational, defined in opposition to, or distinction from, both the lower strata (peasantry, working class, precariat) and the upper strata (aristocracy, plutocracy, global elite) (Weber, 1978). Understanding the evolution of the European middle class therefore requires careful attention to the changing meanings of the terms used to describe it and the shifting criteria upon which its identity and boundaries have been based.

Table 1: Evolving Definitions and Terminology of the European Middle Strata (16th C - Present)

Period	Predominant Terms	Primary Definition Criteria	Key Economic Roles	Relationship to Lower/Upper Strata
16th Century	Burghers, Middling Sort	Legal status, urban residency, corporate membership (guilds)	Artisanal production, urban commerce, professional services	Distinct from peasantry legally; subordinate to but sometimes overlapping with nobility
17th-18th Century	Bourgeoisie	Economic function, education, Enlightenment values	Commercial enterprise, early finance, professions (law, medicine)	Growing tension with aristocracy; distinct from "the people" through education and property
19th Century	Middle Class(es), Bourgeoisie	Property ownership, occupation (industrialist, professional, white-collar), cultural norms	Industrial production and management, professions, clerical work	Clear distinction from industrial working class; complex relationship with aristocracy (emulation/conflict)

Post-WWII	Middle Class, Middle Income	Income level, consumption patterns, education, occupation	Service sector, white-collar professions, management	Blurring with upper working class through mass consumption; gap with elite through capital ownership
Contemporary (c.1980-present)	Middle Class(es), Knowledge Class	Income, education credentials, cultural capital, occupation	Knowledge economy, digital services, professions	Increasing fragmentation and precarity; growing inequality relative to elite; distinction from lower services/working class through education

Historiographical Approaches and Key Debates

The study of the European middle class draws upon diverse theoretical traditions within social history and sociology. Marxist approaches have historically been influential, focusing on the rise of the bourgeoisie as the class owning the means of production in capitalist society (Marx and Engels, 1848). This perspective emphasizes the bourgeoisie's revolutionary role in overthrowing feudalism (Marx and Engels, 1848), its subsequent exploitation of the proletariat (working class) (Marx, 1867), and the inherent class conflict driving historical change (Marx, 1867). Key figures include Karl Marx himself, whose works like The Communist Manifesto and Capital provide foundational analyses (Marx and Engels, 1848).

Max Weber offered a contrasting, multi-dimensional approach, distinguishing between class (market position), status (social honour), and party (political power) (Weber, 1978). Weberian analysis highlights the importance of social closure, cultural values, and bureaucratic structures in shaping social stratification. His seminal work, The Protestant Ethic and the Spirit of Capitalism, explored the connection between religious ideas (specifically Calvinism) and the cultural ethos conducive to capitalist development, a key element in early bourgeois formation (Weber, 1930).

Later sociological frameworks have further enriched the analysis. Pierre Bourdieu's work emphasizes the role of different forms of capital – economic, social, and cultural – in structuring

social space and reproducing inequality (Bourdieu, 1984). His concept of "distinction" explores how cultural tastes and practices function as markers of class position and contribute to social boundary maintenance, particularly relevant for understanding middle-class lifestyles and identity (Habermas, 1989). Scholars like Norbert Elias examined the long-term "civilizing process" involving changes in manners and self-control, often associated with the rising bourgeoisie (Elias, 1978). Social historians like E.P. Thompson, while focusing on the working class, emphasized class as a historical relationship and a product of experience and consciousness, challenging purely structural definitions (Thompson, 1963). Contemporary research often draws on these traditions to analyze issues like social mobility (Breen, 2004), the impact of globalization and deindustrialization (Esping-Andersen, 1990), the transformation of welfare states (Hobsbawm, 1994), and the formation of "new" middle classes in post-industrial societies (Bukodi and Goldthorpe, 2018). Key figures in these contemporary debates include Gøsta Esping-Andersen, Torben Iversen, David Soskice, Guy Standing, and Thomas Piketty.

A central debate revolves around the coherence of the middle class itself. Is it a unified actor with shared interests and consciousness, or a collection of disparate groups occupying the middle ground? (Mills, 1951) Marxist theory often posits a more unified bourgeoisie defined by ownership, while Weberian and contemporary sociological approaches tend to emphasize internal differentiation based on occupation, education, status, and lifestyle (Oesch, 2006). This monograph engages with these debates, acknowledging the internal complexity and fragmentation of the middle strata throughout history.

Structure and Argument of the Monograph

This monograph adopts a chronological approach, examining the evolution of the European middle class across four key periods: the 16th century, the Age of Enlightenment (c. 17th-18th centuries), the Industrial Revolution (c. 18th-19th centuries), and the Post-World War II/Contemporary era (c. 1945-present). Within each period, the analysis focuses on several core themes to ensure continuity: the economic functions and activities of middle groups, their social status and relationship with other strata, their political roles and influence, and their evolving cultural identities and lifestyles.

The central argument advanced is that the European "middle class" is not a monolithic or static entity but a dynamic and historically contingent formation. Its definition, composition, economic role, social status, political power, and cultural identity have undergone profound

transformations driven by major historical forces. These include large-scale economic shifts (the rise of commercial and then industrial capitalism, deindustrialization, globalization), pivotal political developments (the decline of feudalism, revolutions, the rise of the nation-state, the expansion and restructuring of the welfare state), and the influence of powerful cultural ideas (Renaissance humanism, the Reformation, the Enlightenment, liberalism, nationalism, consumerism, individualism). This study traces these transformations across different European contexts (primarily drawing examples from Britain, France, and Germany, but acknowledging broader European trends), highlighting both the continuities that link different historical manifestations of the "middle" strata and the ruptures that mark significant shifts in their nature and societal position. It seeks to demonstrate that understanding the making and remaking of the middle class is crucial for comprehending the broader trajectory of European modernity.

Chapter 1: Precursors and Prototypes: Locating the 'Middling Sort' in 16th-Century Europe

The Society of Orders and the Urban Sphere

Sixteenth-century European society was largely structured not by economic class in the modern sense, but by a system of legally defined 'Estates' or 'Orders' (Koenigsberger et al., 1989). Typically, this involved a tripartite division: the First Estate (clergy), the Second Estate (nobility), and the Third Estate (commoners) (Wikipedia, 2023). Variations existed, such as the four-estate systems in Sweden and Russia which separated burghers and peasants, or the Scottish system of Prelates, Lairds, and Burgh Commissioners (Wikipedia, 2023). Membership in the First and Second Estates conferred significant legal privileges, often including tax exemptions and exclusive access to high office, based primarily on birthright or clerical status (Wikipedia, 2023).

The Third Estate, encompassing the vast majority of the population, was internally diverse, ranging from rural peasants and day labourers to urban artisans, merchants, lawyers, and officials (Wikipedia, 2023). The concept of a "middle" stratum in this period primarily relates to specific groups within this Third Estate, largely situated within the growing towns and cities (Encyclopedia.com, 2023). The term "burgher" (German: Bürger, French: bourgeois) originally denoted a citizen of a burg or walled town, possessing specific rights and privileges granted by municipal charters or town law (Encyclopedia.com, 2023).

Burgher status distinguished its holders from mere residents (Inwohner) or temporary strangers within the town walls, and certainly from the rural peasantry (Danmarkshistorien, 2023). This status typically conferred the right to own property within the town, engage in trade or a craft, participate (albeit often in limited ways) in municipal governance (e.g., voting, holding certain offices), and access forms of social protection (Wikipedia, 2023). The requirements for attaining burgher status varied considerably between towns and regions. Common prerequisites often included legitimate birth, minimum age, freedom from serfdom, property ownership or a certain level of wealth, and sometimes marriage or the prospect thereof (Habsburger.net, 2023). In some instances, specific occupations were key; for example, in Linz, only traders qualified, while craftsmen were merely residents (Habsburger.net, 2023). Burgher status could often be purchased or granted, though sons of existing burghers frequently inherited the status without fee (Habsburger.net, 2023). This legal and political dimension of burghership highlights that the "middle" position in this era was significantly defined by specific rights and civic belonging within the urban context, rather than solely by economic standing relative to others.

Merchants, Burghers, and Artisans: Economic Roles and Social Status

The economic backbone of the urban "middling sort" comprised several key groups. Merchants engaged in commerce, ranging from local retailing and wholesaling to long-distance and even international trade, facilitated by expanding networks and discoveries (Encyclopedia.com, 2023). Artisans and craftsmen, organized within specific trades, were responsible for the production of goods, from textiles and tools to luxury items (Encyclopedia.com, 2023). Other important figures included notaries, moneylenders, lawyers, and various officials who provided essential services within the urban economy (Encyclopedia.com, 2023). These groups, while diverse, occupied a space between the landowning nobility and the mass of agricultural labourers and unskilled urban workers (Encyclopedia.com, 2023).

Their social status, however, was complex and often ambiguous. Generally positioned above the peasantry, their standing relative to the nobility was less clear-cut and subject to regional variation and contemporary attitudes (Encyclopedia.com, 2023). While burghers held privileges within towns, the traditional hierarchy often placed land ownership and noble lineage above commercial wealth (Reddit, 2023). The French jurist Loyseau, writing in the early 17th century, described merchants as "the lowest of the people enjoying an honourable status," granted titles like honorables hommes or bourgeois des villes, which were denied to farmers or artisans,

suggesting a recognized but subordinate position (Reddit, 2023). Some viewed merchants with suspicion or scorn, particularly those envious of their wealth or critical of their itinerant lifestyles which could distance them from community life (Reddit, 2023).

Yet, wealth, particularly that accumulated through trade and finance, offered a potential avenue for social advancement. Wealthy merchants and lawyers could purchase rural estates, adopt aspects of noble lifestyle, and seek advantageous marriages for their children with members of the often-impoverished nobility (Reddit, 2023). This permeability existed in England, France, and parts of the Holy Roman Empire, where new families were sometimes ennobled or absorbed into the gentry (Britannica, 2023). However, this aspiration was not universal. In the Dutch Republic, for instance, the powerful merchant class largely eschewed assimilation into the nobility, instead establishing their own distinct social and political hierarchy where nobles held little sway (Encyclopedia.com, 2023). A particularly elite stratum existed in some German cities: the Großbürger or Grand Burghers. These were hereditary patrician families, often of immense mercantile wealth exceeding that of many nobles, who held exclusive legal and political rights, effectively forming a ruling class within free imperial cities like Hamburg or Augsburg, independent of feudal lords (Wikipedia, 2023). Their existence underscores the significant internal differentiation within the broader category of "burgher."

Guilds, Corporate Identity, and Early Differentiation

The social and economic lives of artisans and many merchants in 16th-century towns were heavily structured by guilds (Britannica, 2023). These associations, typically divided into merchant guilds and craft guilds, played a crucial role in the urban fabric (Britannica, 2023). Merchant guilds often comprised the majority of traders in a town, regulating local and long-distance commerce, while craft guilds brought together artisans within a specific industry (e.g., weavers, goldsmiths, bakers) (Britannica, 2023).

Guilds performed several key functions. They sought to establish monopolies over their trade within a locality, control competition among members, set and maintain standards for the quality of goods and workmanship, ensure fair trading practices, and work towards stable prices (Britannica, 2023). Membership provided a framework for training through the apprenticeship system, progressing to the status of journeyman and, ultimately, master craftsman (Britannica, 2023). This hierarchical structure regulated entry into the trade and defined stages of skill and status within the occupation (Britannica, 2023). Beyond economics, guilds fostered a strong sense of corporate identity and solidarity among members, often

reinforced through shared rituals, religious observances, charitable activities for members and the wider community, and the maintenance of guildhalls for meetings and banquets (Britannica, 2023).

However, the guild system also contained seeds of internal differentiation. The path from apprentice to master was not always straightforward, and by the 16th century, in some areas, masterships were becoming increasingly hereditary or required prohibitive fees, limiting opportunities for journeymen (Britannica, 2023). This could create tension between masters, who owned the workshops and controlled the guild, and the journeymen they employed, foreshadowing later capital-labour divisions (European History, 2023). Furthermore, the distinction between wealthy guild masters or large-scale merchants and smaller artisans or shopkeepers was significant (Koenigsberger et al., 1989). The Grand Burghers, for example, were clearly distinct from the Kleinbürger (petty-burghers) who comprised the bulk of artisans and small traders (Wikipedia, 2023). While guilds provided structure and identity, they did not create a homogenous "middle" group. Moreover, by the 16th century, the power of guilds was beginning to wane in some regions due to the rise of new markets, larger accumulations of capital outside the guild system, and technological changes that challenged their control over production and trade (Britannica, 2023).

The social landscape of 16th-century Europe did not contain a "middle class" in the modern sense. Instead, the intermediate strata between the privileged nobility/clergy and the mass of the peasantry were primarily defined by their urban location and the specific legal rights associated with burghership, alongside the corporate structures of guilds that regulated economic activity and shaped occupational identity. This "middling sort" was internally diverse, ranging from wealthy international merchants and powerful Grand Burghers who might rival nobles in influence, to modest shopkeepers and skilled artisans operating within strict guild hierarchies. Their status was rooted more in legally defined privileges and corporate belonging within the traditional society of orders than in a shared economic position or a unified class consciousness. Their relationship with the nobility varied, from aspirational imitation and intermarriage in some regions to the creation of alternative power structures in others, demonstrating the contingent and regionally specific nature of social hierarchies in this period. Seminal works like H. G. Koenigsberger's Europe in the Sixteenth Century provide valuable context on the town life and economic background of this era (Koenigsberger et al., 1989), while Fernand Braudel's concept of the "long 16th century" frames the broader economic transformations underway (Wallerstein, 1974).

Chapter 2: The Rise of the Bourgeoisie: Enlightenment, Revolution, and Identity (c. 17th-18th Centuries)

The 17th and 18th centuries witnessed profound intellectual, economic, and political shifts that catalyzed the formation of a more self-conscious and influential "middle class," increasingly referred to by the term bourgeoisie. While originating from the Old French term for 'town dweller' (borgeis), 'bourgeoisie' evolved to signify a growing stratum of merchants, financiers, manufacturers, professionals, and intellectuals whose power derived less from inherited privilege and more from economic activity and acquired knowledge (Marx and Engels, 1848). This period saw this group develop a distinct cultural identity and articulate political aspirations fundamentally shaped by the intellectual currents of the Enlightenment and the changing economic landscape.

Enlightenment Ideals and the Formation of Bourgeois Consciousness

The Enlightenment, a major European intellectual movement flourishing from the late 17th through the 18th century, provided a powerful ideological framework for the rising bourgeoisie (Wikipedia, 2023). Central tenets included the celebration of reason, the belief in progress through knowledge and scientific method, the importance of individual liberty and rights (often conceptualized as "natural rights" to life, liberty, and property, as articulated by John Locke), equality before the law, religious tolerance, and the desirability of constitutional government with separation of powers (Locke, 1689). Thinkers like Locke, Montesquieu, Voltaire, Rousseau, Adam Smith, and Immanuel Kant disseminated these ideas through influential works such as Locke's Two Treatises of Government (1689, published anonymously in London by Awnsham Churchill), Montesquieu's The Spirit of the Laws (1748, first published in Geneva by Barrillot & Fils), Rousseau's The Social Contract (1762, published in Amsterdam by Marc-Michel Rey), Smith's The Wealth of Nations (1776, published in London by W. Strahan and T. Cadell), and the monumental Encyclopédie edited by Diderot and d'Alembert (published in Paris between 1751-1772) (Diderot and d'Alembert, 1751-1772).

These ideals resonated deeply with the experiences and aspirations of the bourgeoisie (Marx and Engels, 1848). The emphasis on reason and individual achievement challenged the hereditary privileges and perceived irrationality of the aristocratic Ancien Régime (Locke, 1689). The concept of natural rights and equality (even if often implicitly limited to property-owning white men) provided a justification for demanding political representation and an end to noble exemptions and monopolies (Marx and Engels, 1848). The Enlightenment's focus on progress

through knowledge aligned with the bourgeoisie's involvement in commerce, innovation, and professional expertise (Khan Academy, 2023).

This intellectual ferment contributed to the formation of a distinct bourgeois Weltanschauung or worldview (Marx and Engels, 1848). This worldview increasingly emphasized values such as rationality, industriousness, thrift, sobriety, respectability, self-improvement through education, and a belief in meritocracy (Mills, 1951). These values stood in contrast to perceived aristocratic idleness, extravagance, and reliance on birthright. The pursuit of knowledge and cultural refinement became important markers of bourgeois status, distinguishing them from the "unenlightened" masses below (Fiveable, 2023). The fusion of growing economic power with these powerful Enlightenment ideas allowed the bourgeoisie to articulate a claim to social and political leadership based not on tradition, but on reason, utility, and the rights of man.

Economic Activities: From Mercantilism to Early Capitalism

The economic landscape of the 17th and 18th centuries was largely dominated by mercantilism, an economic theory and practice emphasizing state regulation to augment national power (Britannica, 2023). Key tenets included accumulating precious metals (bullion), maintaining a favorable balance of trade (maximizing exports, minimizing imports), establishing colonies as sources of raw materials and captive markets, and protecting domestic industries through tariffs and monopolies (Britannica, 2023). Powerful chartered companies like the British and Dutch East India Companies exemplified this system (Britannica, 2023).

The bourgeoisie – particularly merchants, financiers, and early manufacturers – operated within this mercantilist framework. They often benefited from state-sponsored monopolies, protectionist tariffs, and the exploitation of colonial resources and trade routes, including the lucrative and brutal transatlantic slave trade (Investopedia, 2023). However, mercantilist restrictions, such as the Navigation Acts limiting colonial trade, could also hinder entrepreneurial activity and lead to resentment, as seen in the American colonies (Britannica, 2023).

Simultaneously, the elements of modern capitalism were developing, often driven by the bourgeoisie. There was an increasing emphasis on private property, the accumulation and investment of capital, and the expansion of market relations (Marx and Engels, 1848). Thinkers like Adam Smith, in The Wealth of Nations (1776), provided a powerful critique of mercantilism, advocating for free markets, minimal government intervention, and the "invisible hand" guiding

economic activity towards the common good through individual self-interest (Smith, 1776). While Smith's ideas would take time to fully supplant mercantilism, they reflected and further encouraged the burgeoning capitalist spirit among segments of the bourgeoisie. This era also saw the development of crucial financial infrastructure, including more sophisticated banking systems, credit facilities, and the rise of insurance, which helped mitigate risk and facilitate larger-scale investment and enterprise (Quizlet, 2023). These economic activities and evolving frameworks significantly increased the wealth, influence, and economic dynamism of the European bourgeoisie (Marx and Engels, 1848).

Political Agency and the Challenge to the Ancien Régime

Fueled by their growing economic importance and armed with the language of Enlightenment rights and reason, the bourgeoisie increasingly sought political power commensurate with their societal contribution (Mills, 1951). They challenged the legitimacy of absolute monarchy and the privileges of the aristocracy and clergy, advocating for constitutional government, the rule of law, representative assemblies, civil liberties (such as freedom of speech and religion), and equality of opportunity (Marx and Engels, 1848).

This quest for political influence often placed the bourgeoisie at the forefront of revolutionary movements aimed at dismantling the Ancien Régime. The French Revolution of 1789 stands as the most prominent, though not the only, example (Marx and Engels, 1848). Members of the Third Estate, led significantly by bourgeois elements (lawyers, merchants, professionals, intellectuals), demanded reforms, challenged the voting structure of the Estates-General, declared themselves a National Assembly, and ultimately overthrew the monarchy (Marx and Engels, 1848). They drew heavily on Enlightenment ideals, quoting Rousseau and Voltaire, and demanding "liberty, equality, fraternity" (Essex Student Journal, 2023).

However, the role of the bourgeoisie in the French Revolution, and the concept of "bourgeois revolution" itself, is complex and debated by historians (Hobsbawm, 1962). While Marxist interpretations traditionally viewed it as a clear case of the capitalist bourgeoisie overthrowing the feudal aristocracy (Marx and Engels, 1848), revisionist historians point to the significant number of reform-minded nobles involved, the fluidity between nobility and wealthy bourgeoisie through marriage and office-purchase, and the internal divisions within the bourgeoisie itself (Blanning, 1998). The Parisian bourgeoisie, for instance, was differentiated into the "haute bourgeoisie" (sometimes seen as aristocratic in inclination) and the "petite bourgeoisie" (shopkeepers, artisans, clerks, writers) who were often more closely allied with

the popular movement (sans-culottes) (Blanning, 1998). Furthermore, after initially leading the charge, some segments of the bourgeoisie sought to halt the revolution once their initial aims (e.g., constitutional monarchy, protection of property, abolition of feudal dues without compensation, free markets) were achieved or threatened by more radical popular demands (Swansea University, 2023). Despite these complexities, the Enlightenment era undeniably saw the bourgeoisie emerge as a major political force, capable of mobilizing broad support (including peasants and urban workers) and fundamentally challenging the established political order across Europe (Marx and Engels, 1848).

Cultural Expressions and the Public Sphere

The Enlightenment era also witnessed the flourishing of a distinct bourgeois public sphere, operating largely outside the direct control of the court and the church (Khan Academy, 2023). This sphere comprised new spaces for sociability and intellectual exchange, such as coffee houses, salons (often hosted by influential women), reading societies, Masonic lodges, and lending libraries (Fiveable, 2023). These venues facilitated the discussion and dissemination of Enlightenment ideas, the formation of public opinion, and the cultivation of bourgeois social networks (Melton, 2001). The burgeoning print culture – including newspapers, journals, pamphlets, novels (like Samuel Richardson's influential Pamela), and compendia like the Encyclopédie – played a vital role in spreading knowledge, fostering critical debate, and shaping a shared bourgeois consciousness across national borders (Khan Academy, 2023).

Bourgeois cultural tastes reflected the values of the era. There was a strong emphasis on education and self-improvement, seen as paths to both personal virtue and social advancement (Mills, 1951). Literature, particularly the novel, explored themes of individual experience, morality, and social mobility (Kates, 2022). Music, theatre, and art patronage also became markers of cultivation (Fiveable, 2023). Fashion began to show egalitarian tendencies, moving away from the idea that richness was solely the prerogative of the aristocracy (Britannica, 2023). Domesticity and the private sphere gained importance, with an emphasis on family life as a refuge and a space for moral development (Weber, 1978). Consumption patterns shifted, with growing demand for new goods, including colonial products like sugar, coffee, and chocolate, as well as manufactured items, reflecting both rising incomes and evolving tastes (Quizlet, 2023). These cultural practices and the spaces in which they occurred were not merely reflections of economic status; they were actively involved in constructing and performing bourgeois identity, distinguishing this group from the nobility above and the

common people below, and solidifying their sense of collective self during a period of profound societal change (Habermas, 1989). Key works exploring this include James Melton's The Rise of the Public in Enlightenment Europe (Melton, 2001) and studies analyzing the impact of specific influential books, such as those by Gary Kates (Kates, 2022).

Chapter 3: The Making of the Modern Middle Class: Industrialization and Social Transformation (c. 18th-19th Centuries)

The Industrial Revolution, beginning in Great Britain in the late 18th century and spreading across continental Europe and North America during the 19th century, represents arguably the most significant watershed in the formation of the modern middle class (Toynbee, 1884). This period of unprecedented technological innovation and economic restructuring fundamentally altered the social landscape, leading to a massive expansion, diversification, and consolidation of the middle strata of European society.

Industrial Capitalism and the Restructuring of Society

The Industrial Revolution entailed a profound shift from an agrarian and handicraft-based economy to one dominated by industry and machine manufacturing (Toynbee, 1884). Key technological breakthroughs—such as James Watt's improved steam engine, the mechanization of textile production (spinning jenny, water frame, power loom), advancements in iron production (coke smelting, puddling), and the development of railways and steamships—revolutionized production processes and transportation (Marx, 1867). New energy sources, primarily coal powering steam engines, replaced traditional reliance on wind, water, and animal power (Marx, 1867).

This technological transformation necessitated new ways of organizing work. The factory system, concentrating machinery and workers under one roof, replaced the dispersed domestic or cottage industry system (Marx, 1867). This shift involved a move towards a more capital-intensive economy, requiring significant investment in machinery and infrastructure (Auburn School District, 2023). It also created a fundamental division between those who owned the means of production (capitalists, factory owners) and those who sold their labour for wages (the industrial working class or proletariat) (Marx and Engels, 1848). This rise of industrial capitalism reshaped social relations, spurred massive urbanization, and created new forms of wealth and poverty (Auburn School District, 2023). While the term "Industrial Revolution" suggests abrupt change, historians recognize it evolved from earlier developments,

including what Jan De Vries termed the "industrious revolution"—a household-level shift towards increased market-oriented labour and consumption preceding large-scale industrialization (De Vries, 1994).

Diversification: The Old and New Middle Classes

A defining feature of the 19th century was the dramatic growth and increasing complexity of the middle class (Fiveable, 2023). Industrialization did not simply enlarge the pre-existing bourgeoisie; it created new roles and distinctions within the middle strata. It becomes crucial during this period to differentiate between the "old" middle class, or petite bourgeoisie, and the rapidly expanding "new" middle class (Oesch, 2006).

The "old" middle class consisted primarily of small-scale property owners and independent producers: shopkeepers, merchants, master artisans, and some farmers (Mills, 1951). While some artisans and craftsmen were displaced by mechanization or reduced to wage labour (Fiveable, 2023), many in this group persisted, occupying niches in retail, services, and specialized crafts. Their economic base remained tied to small property ownership and independent enterprise.

The "new" middle class, largely a product of industrial and bureaucratic expansion, was more diverse and arguably more dynamic (Mills, 1951). At its apex was the haute bourgeoisie: wealthy industrialists, factory owners, bankers, and large-scale merchants who controlled significant capital and wielded considerable economic power (Marx and Engels, 1848). Below them emerged a growing stratum of professionals – lawyers, doctors, engineers, architects – whose status derived from specialized knowledge and credentials, often acquired through higher education (Mills, 1951). Industrial and commercial growth also created a huge demand for managers, administrators, supervisors, and technical staff in factories, banks, railway companies, and expanding government bureaucracies (Mills, 1951). This led to the proliferation of "white-collar" salaried employees – clerks, accountants, salespeople – who formed a significant segment of the lower middle class (Mills, 1951).

These different segments possessed varying levels of wealth, security, education, and social prestige (Oesch, 2006). The factory owner's interests might diverge significantly from those of the salaried clerk or the independent shopkeeper. This internal diversification meant that the "middle class" of the 19th century was less a unified entity and more a complex hierarchy of groups occupying the space between the aristocracy and the industrial working class.

Understanding this complexity is central to analyzing the social and political dynamics of the era, as explored in comparative works such as Jerrold Seigel's Modernity and Bourgeois Life (Seigel, 2012).

Urbanization, Lifestyle, and Consumption Patterns

The factory system drew populations from the countryside, leading to unprecedented urban growth (Fiveable, 2023). Cities like Manchester exploded in size, becoming centers of industry but also sites of stark social contrasts (Allen, 2011). Distinct residential patterns emerged, with the middle classes increasingly seeking refuge from the perceived squalor, pollution, and social unrest of inner-city industrial districts by moving to newly developing suburbs (Fiveable, 2023). These suburbs offered more spacious housing, gardens, and a greater sense of privacy and separation from the working classes who remained concentrated in overcrowded tenements and slums characterized by poor sanitation and disease (Fiveable, 2023).

Middle-class life in the 19th century was increasingly defined by a specific set of cultural values and practices often associated with "Victorian morality" (British Literature Wiki, 2023). Emphasis was placed on respectability, sobriety, thrift, hard work, and self-discipline (Fiveable, 2023). Education was highly valued as a means of social advancement and maintaining status (Fiveable, 2023). Domesticity became a central ideal, with a sharpening distinction between the male public sphere of work and politics and the female private sphere of home and family (Weber, 1978). Middle-class women were expected to be guardians of morality, managers of the household (often overseeing servants), and educators of children, creating an "emotional haven" for men returning from the competitive world (Britannica, 2023).

Consumption also played a key role in defining middle-class identity. Increased wealth and the availability of mass-produced goods fueled a burgeoning consumer culture (Auburn School District, 2023). Furnishing the home, clothing styles, food choices, and leisure activities became markers of status and taste, used to differentiate the middle classes from those below them and, sometimes, to emulate the aristocracy (Fiveable, 2023). Leisure pursuits included reading clubs, amateur sports (like cricket and rugby), seaside holidays, musical evenings, and dinner parties (Fiveable, 2023). This carefully curated lifestyle, grounded in specific moral codes and consumption patterns, served to solidify a sense of shared identity and maintain social boundaries in a rapidly changing world.

Political Consolidation and Class Relations (Britain, France, Germany)

The 19th century saw the middle classes consolidate their political influence across much of Western Europe, often championing liberal ideals (Marx and Engels, 1848). They pushed for constitutional governments, parliamentary representation (though suffrage was often initially restricted by property qualifications), the rule of law, free trade, and individual liberties (Marx and Engels, 1848). Their relationship with the traditional aristocracy evolved; in some cases, particularly among the haute bourgeoisie, there was considerable intermarriage and adoption of aristocratic lifestyles, leading to a partial fusion of elites (Oesch, 2006). In other instances, tensions remained, but the shared fear of popular unrest and the rising working class often forged alliances between old and new elites, especially after the revolutions of 1848 demonstrated the potential threat from below (Oesch, 2006).

The relationship with the rapidly growing industrial working class was inherently conflictual, defined by the dynamics of capital and labour (Marx and Engels, 1848). While the middle classes benefited significantly from industrialization, the working class often faced harsh conditions: long hours, low wages, dangerous workplaces, and poor living conditions (Marx, 1867). This led to the emergence of working-class consciousness, the formation of trade unions, and the rise of socialist movements challenging the capitalist order and demanding political and economic rights (Fiveable, 2023).

The trajectory of middle-class development varied across nations. Britain, the pioneer of industrialization, had a relatively early and powerful industrial bourgeoisie, alongside a commercially-minded aristocracy (Britannica, 2023). France experienced slower industrialization and a more complex political landscape following its revolution, with ongoing tensions between different factions of the bourgeoisie and the legacy of aristocratic and popular forces (Historical Materialism, 2023). Germany industrialized later but more rapidly, particularly after unification in 1870, with a strong role played by the state and banks, and a middle class (Bürgertum) that arguably had different political traditions and relationships with the state compared to its Western counterparts (DeepBlue Repositories, 2023). These national specificities, explored in works comparing Britain, France, and Germany (Seigel, 2012), shaped the particular character and political role of the middle classes in each context.

Social mobility, while ideologically celebrated in the narrative of the self-made man (Allen, 2011), remained constrained for many (Oxford University, 2023). While industrialization created new opportunities, access to the upper echelons of the middle class often depended on initial capital, connections, and increasingly, formal education (Fiveable, 2023). Universities and professional schools expanded, becoming key institutions for reproducing middle-class status

and providing pathways for limited upward mobility from the lower middle class (Fiveable, 2023).

Chapter 4: Fragmentation and Resilience: The European Middle Class from Post-War Boom to Contemporary Challenges

The period following World War II ushered in dramatic transformations for the European middle class, initially characterized by unprecedented prosperity and security under the aegis of the expanding welfare state, but later marked by fragmentation and new challenges arising from deindustrialization, globalization, and profound socio-economic restructuring.

The Welfare State and the "Golden Age" (c. 1945-1975)

The decades following 1945 are often referred to as a "Golden Age" of capitalism in Western Europe, characterized by strong economic growth, rising living standards, and the consolidation of the welfare state (Hobsbawm, 1994). Building on pre-war foundations and wartime planning (influenced by figures like William Beveridge in the UK), European nations significantly expanded social provision (Beveridge, 1942). This involved establishing or universalizing national health services (like the UK's NHS), broadening social security systems (pensions, unemployment benefits, sickness benefits), increasing access to education (including higher education), and sometimes providing family allowances and social housing (Hobsbawm, 1994). The motivations were mixed: a desire to avoid the social instability and conflict of the interwar years, the influence of Keynesian economics emphasizing demand management and full employment, a post-war political consensus favouring social solidarity, and the need to rebuild societies and legitimize democratic institutions (Hobsbawm, 1994).

This expansion had a profound impact on the middle class. Increased economic security through social insurance and stable employment (often in expanding public sectors) buffered families against risks (University of Surrey, 2023). Easier access to higher education facilitated intergenerational mobility and the growth of professional occupations (Britannica, 2023). Rising real wages and disposable incomes fueled mass consumption, allowing middle-class families (and increasingly, segments of the working class) to acquire consumer durables like cars and refrigerators, travel more widely, and enjoy a more comfortable lifestyle (Britannica, 2023). Some sociologists and historians argued that this widespread prosperity and the universal nature of many welfare benefits led to a degree of social convergence, blurring the sharp cultural distinctions between the middle and working classes that characterized earlier periods

(Bourdieu, 1984). Shared consumption patterns and lifestyles seemed to point towards a more homogenous, "levelled middle-class society," although significant income and wealth inequalities certainly persisted (Bourdieu, 1984).

Deindustrialization, Economic Restructuring, and the Rise of the Service Sector

This period of stability and shared growth began to unravel from the late 1960s and 1970s onwards, primarily due to the onset of deindustrialization across Western Europe (Esping-Andersen, 1990). The decline of traditional heavy industries like coal mining, steel production, shipbuilding, and textiles was driven by several factors, including technological automation, increased competition from newly industrializing countries, the oil shocks of the 1970s, and the strategic decisions of corporations to relocate production to areas with lower labour costs and weaker regulations (Esping-Andersen, 1990).

This process had devastating consequences for regions and communities heavily reliant on manufacturing, leading to factory closures, mass unemployment, and the erosion of the economic base for both traditional working-class and segments of the old middle class tied to these industries (ResearchGate, 2023). The term "Rust Belt," initially used in the US, came to describe formerly prosperous industrial areas facing economic decline and social decay (Consilience Project, 2023).

Concurrently, European economies underwent significant restructuring, shifting away from manufacturing towards services (Fiveable, 2023). This involved growth in areas like finance, healthcare, education, retail, tourism, and information technology, leading to the rise of the "knowledge-based economy" (KBE) (Iversen and Soskice, 2019). This sectoral shift created new employment opportunities, primarily in white-collar, professional, managerial, and technical roles, but often demanded different skills (particularly higher education) than the jobs lost in industry (Esping-Andersen, 1990). This transition fundamentally reshaped the occupational structure and the composition of the middle class itself.

Globalization, Technology, and New Patterns of Inequality and Precariousness

The forces of globalization intensified during the late 20th and early 21st centuries, further impacting European class structures (IPPR, 2023). Increased international trade, the liberalization of capital markets, greater migration flows, and the integration of economies (notably through the European Union project) created new opportunities but also new competitive pressures and sources of insecurity (Esping-Andersen, 1990). Technological

advancements, particularly in information and communication technology (ICT), automation, and digitalization, further accelerated economic restructuring, favouring skilled labour while potentially displacing routine manual and cognitive tasks (Iversen and Soskice, 2019).

These interconnected trends contributed to rising income inequality within many advanced economies after the relative egalitarianism of the post-war decades (IPPR, 2023). While some groups benefited significantly from globalization and technological change, others faced wage stagnation or decline. Concerns grew about a "hollowing out" or "squeezing" of the middle class, with polarization between high-income earners (the "rich") and low-income earners (the "poor"), potentially shrinking the relative size or economic security of those in the middle (European Social Survey, 2023). Research suggests that increases in the income share of the top 20% may negatively impact overall growth, while increases for the bottom 20% are associated with higher growth, challenging simple "trickle-down" assumptions (Piketty, 2014).

Alongside rising inequality, the period saw an increase in labour market precariousness – work characterized by uncertainty, instability, short-term contracts, low pay, and limited social benefits or protections (Standing, 2011). While precarious work disproportionately affects lower-skilled workers, some argue that segments of the educated middle class, particularly younger generations or those in certain service sectors, are also increasingly exposed to these conditions (Iversen and Soskice, 2019). This trend is linked to neoliberal economic policies emphasizing labour market flexibility, the decline of trade union power, and reforms or retrenchment in welfare state provisions that previously offered greater security (Esping-Andersen, 1990). Guy Standing introduced the term "precariat" to describe this emerging class defined by insecurity and lack of stable occupational identity (Standing, 2011).

The Shifting Landscape: Social Mobility, Identity Politics, and the "New" Middle Classes

The changing economic and social landscape has raised questions about social mobility. While the post-war era saw significant upward mobility, fueled by economic growth and educational expansion, contemporary patterns appear more complex and potentially constrained (Mills, 1951). Research using large-scale surveys like the European Social Survey investigates the strength of the association between parents' and children's class positions (relative mobility or social fluidity) (Breen, 2004). While the ideal of meritocracy persists, evidence suggests that family background continues to significantly influence life chances, and the role of education as a mobility channel is itself stratified (European Social Survey, 2023). Seminal works by scholars

like Erikson and Goldthorpe established benchmarks for comparing mobility across nations, though much of this foundational work used data from the 1970s-1990s (Erikson and Goldthorpe, 1992).

Contemporary analyses often focus on the distinction between "old" and "new" middle classes (Iversen and Soskice, 2019). The "new" middle class is typically characterized by high levels of education and employment in professional, managerial, and technical roles within the expanding service and knowledge sectors (Mills, 1951). This group is often seen as benefiting from, and being supportive of, economic liberalization, technological innovation, and European integration (Iversen and Soskice, 2019). In contrast, the "old" middle class, rooted in industrial production or small business ownership, may feel threatened by these same trends, potentially experiencing economic insecurity and expressing greater skepticism towards globalization or cultural change (Iversen and Soskice, 2019).

Defining the contemporary middle class remains challenging. Income-based definitions (e.g., 70-150% or 60-200% of median income) are common in policy and comparative research due to data availability (Mills, 1951). Occupational classifications, like the European Socio-Economic Classification (ESEC), offer a more structural approach (Breen, 2004). However, sociological perspectives continue to emphasize the importance of education, lifestyle, consumption patterns, values, and subjective identification in defining middle-class status (Mills, 1951). Research shows, for example, how social mobility influences cultural tastes (Oxford Academic, 2023) and how class background impacts self-concept and social cognition (Bukodi and Goldthorpe, 2018).

The economic pressures of inequality and precariousness, combined with cultural shifts towards individualism (Mills, 1951) and the rise of identity politics, appear to be fragmenting the middle class. Divergent economic interests and cultural outlooks between different segments (e.g., secure professionals vs. precarious service workers, older vs. younger generations, native-born vs. immigrants) may undermine traditional class solidarities (World Bank, 2023). This fragmentation may fuel political instability and the rise of populism, as different groups respond differently to the perceived threats and opportunities of globalization and societal change (Iversen and Soskice, 2019). The post-war welfare state, initially a source of middle-class security and expansion, now faces pressures from these diverging interests and new social risks, leading to ongoing debates about reform, sustainability, and the very definition of social solidarity in contemporary Europe (Esping-Andersen, 1990).

Conclusion

The European Middle Class: A Longue Durée Perspective

Tracing the trajectory of the European "middle class" over five centuries reveals not a linear progression towards a clearly defined entity, but a complex and often discontinuous process of formation, transformation, and fragmentation. The privileged, legally defined burghers and guild members of 16th-century towns bear only a partial resemblance to the revolutionary bourgeoisie animated by Enlightenment ideals who challenged the Ancien Régime. They, in turn, differ significantly from the vast and internally diversified middle classes forged by the Industrial Revolution, encompassing both powerful industrialists and legions of white-collar clerks. The relatively secure, welfare-state-supported middle strata of the post-World War II "Golden Age" represent another distinct phase, which has given way to the more precarious, unequal, and fragmented middle classes navigating the complexities of deindustrialization, globalization, and the knowledge economy in the contemporary era. This longue durée perspective underscores the central argument of this monograph: the "middle class" is fundamentally a historical construct, its boundaries, composition, and significance perpetually redefined by the interplay of economic structures, political forces, social relations, and cultural meanings.

Continuity and Change in Core Themes

Examining the evolution through the core themes reveals both underlying continuities and profound shifts:

Economic Function: The economic base shifted dramatically from urban trade, craft production, and finance within a corporate/mercantilist framework as discussed in Chapters 1 and 2 to large-scale industrial production, management, and finance under industrial capitalism as explored in Chapter 3, and subsequently to knowledge work, services, and globalized finance in the post-industrial era as analyzed in Chapter 4. The relationship to the means of production, a key Marxist criterion, became more complex, moving beyond simple ownership to include managerial control and the possession of valuable human capital (skills, education) (Mills, 1951).

Social Status Markers: Markers of "middle" status evolved from legal rights (burghership) and corporate membership (guilds) as examined in Chapter 1 to wealth derived from commerce and

professions, coupled with Enlightenment values as detailed in Chapter 2. The 19th century emphasized property ownership, occupation (industrialist, professional, white-collar), and adherence to specific cultural norms of respectability and domesticity as documented in Chapter 3. In the contemporary era, higher education credentials, income levels, consumption patterns, and lifestyle choices have become increasingly significant markers, though often existing alongside persistent inequalities and new forms of insecurity (Bourdieu, 1984).

Political Role: The political agency of middle groups expanded from limited participation in urban governance as described in Chapter 1 to becoming a revolutionary force challenging aristocratic dominance as analyzed in Chapter 2. In the 19th century, they often became the bedrock of liberal states, advocating for constitutionalism and market economies, while navigating complex relationships with both the aristocracy and the rising working class as shown in Chapter 3. The post-war era saw broad middle-class support for the welfare state consensus as examined in Chapter 4, but contemporary fragmentation has led to more volatile political alignments, with different segments potentially supporting divergent agendas (e.g., neoliberalism, social investment, populism, welfare chauvinism) (Iversen and Soskice, 2019).

Cultural Identity: Identity shifted from the corporate identity of the burgher/guild member as discussed in Chapter 1 to the rationalist, universalist (in principle) identity of the Enlightenment bourgeoisie as described in Chapter 2. The 19th century fostered a culture emphasizing domesticity, morality, and social distinction as examined in Chapter 3. The post-war era saw the rise of mass consumer culture potentially homogenizing lifestyles, while the contemporary period is marked by greater individualism, diverse lifestyle choices, but also anxieties related to economic insecurity and identity politics (Mills, 1951).

Table 2: Key Transformations of the European Middle Class (16th C - Present)

Dimension	16th Century	17th-18th Centuries	19th Century	Post-WWII Era	Contemporary Era
Economic Base	Urban trade, craft production, urban services	Commercial capitalism, early manufacturing, professions	Industrial capitalism, proliferation of white-collar work	Mass production, managerial capitalism, expanded services	Knowledge economy, financial capitalism, globalized services

Core Groups	Burghers, guild masters, merchants, urban professionals	Merchants, manufacturers, financiers, professionals, intellectuals	Industrialists, financiers, managers, professionals, clerks	Expanded professional class, public sector employees, managers	Knowledge workers, professionals, technical specialists, precarious service workers
Status Markers	Legal privilege, burgher rights, guild membership	Wealth, education, cultural refinement, Enlightenment values	Property ownership, occupation, lifestyle, moral conduct	Income, consumption patterns, education, stable employment	Educational credentials, consumption, digital literacy, job security (for some)
Political Role	Limited urban governance, subordinate to nobility	Revolutionary challenge to aristocratic privilege	Liberal constitutionalism, suffrage expansion, class alliance/tension	Support for welfare state, mass political parties	Fragmentation, identity politics, varied responses to globalization
Key Challenges	Guild restrictions, aristocratic dominance	Ancien Régime privileges, mercantilist constraints	Industrial capitalism's volatility, working-class emergence	Cold War constraints, 1970s economic crises	Precarity, inequality, technological disruption, environmental limits

Contemporary Issues and Future Research Directions

The European middle class continues to face significant challenges in the 21st century. The ongoing impacts of automation and artificial intelligence on professional and white-collar employment raise new questions about future job security and skills requirements. The transition towards a green economy, necessary to combat climate change, will likely involve further economic restructuring with uneven consequences across different sectors and regions, potentially creating new winners and losers within the middle strata (World Bank, 2023). Persistent and potentially widening inequalities in income and wealth, coupled with concerns about declining intergenerational mobility, threaten social cohesion and the traditional narrative of middle-class opportunity (Breen, 2004). The sustainability and form of the welfare

state in the face of demographic ageing, migration pressures, and fiscal constraints remain critical issues, directly impacting middle-class security and expectations (Hobsbawm, 1994). Political polarization and the rise of populism, often fueled by economic anxieties and cultural grievances among segments feeling "left behind," further complicate the notion of a stable middle-class consensus (IPPR, 2023).

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