

**A Critical Examination of The Relevance of John Wesley's Economic Ethics in  
Contemporary South Africa with Specific Reference to Unemployment, Poverty and  
Inequality**

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## **ABSTRACT**

John Wesley did not specifically seek to propose structured “economic ethics”, but rather was the chief tutor to the people called Methodists on the economic ordering of their lives during 18<sup>th</sup> century England. While Wesley taught and preached among the poor, he never pronounced on the Elizabethan Poor Laws, the most comprehensive yet poorly implemented government sponsored program aimed at fighting poverty.


The study notes that John Wesley’s mother, Suzanna Wesley, had an immense influence on him. Since she was a conformist as John later became, choosing to turn a blind eye to inefficiencies in the state. It is from this context that his ethics emerged. Consequently, the purpose of this study is to illumine his economics ethics.

Conditions of unemployment, poverty and inequality in contemporary South Africa will also be illumined in the study. This study argues that while Wesley’s teachings may appear primordial, they can be appropriated to the current situation in South Africa. Specifically, the study argues that John Wesley’s economic ethics are premised on the four economic principles of the need for government intervention, honest and life-enhancing work, poverty alleviation and the equitable distribution of wealth. Furthermore, the study concludes that these principles remain relevant and can be appropriated to contemporary South Africa in addressing the socio-economic contexts of unemployment, poverty and inequality.

On the basis of this appropriation, the study develops three propositions: a political dispensation which focuses on employment creation, the building of an inclusive economy, and mobilization for social cohesion.

## DECLARATION

Submitted in fulfilment of the requirements for the degree of Master of Theology, in the Graduate Programme in the School of Religion, Philosophy and Classics, at the University of KwaZulu-Natal, Pietermaritzburg, South Africa.

I, **Sejanamane Solomon Gregory Lethale**  declare that:

1. The research reported in this thesis, except where otherwise indicated, is my original research.
2. This thesis has not been submitted for any degree or examination at any other university.
3. This thesis does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons.
4. This thesis does not contain other persons' writing, unless specifically acknowledged as being sourced from other researchers. Where other written sources have been quoted, then:
  - a. Their words have been re-written but the general information attributed to them has been referenced
  - b. Where their exact words have been used, then their writing has been placed in italics and inside quotation marks, and referenced.
5. This thesis does not contain text, graphics or tables copied and pasted from the Internet, unless specifically acknowledged, and the source being detailed in the thesis and in the References sections.

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Signature

8 February 2023

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8 February 2023

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## LIST OF ACRONYMS

ANC	African National Congress
AsgiSA	Accelerated and Shared Growth Initiative for South Africa
BCEWT	Boston Encyclopedia of Western Theology
BRICS	Brazil, Russia, India, China and South Africa
COVID-19	Coronavirus Disease of 2019
COSATU	Congress of South African Trade Unions
DAC	Department of Sports, Arts and Culture
DRC	Dutch Reformed Church
ESSET	Ecumenical Service for Socio-Economic Transformation
GEAR	Growth, Employment and Redistribution Plan
GDP	Gross Domestic Product
HDI	Human Development Index
HDR	Human Development Report
IMF	International Monetary Fund
ILO	International Labour Organization
LBPL	Lower-Bound Poverty Line
LMIP	Labour Market Intelligence Partnership
LMS	London Missionary Society
L&D	The Methodist Book of Order: The Laws and Disciplines of the Methodist Church of Southern Africa, Twelfth Edition: Revised 2016
MCSA	The Methodist Church of Southern Africa
MDG	Millennium Development Goals
NDP	National Development Plan
NEA	Not Economically Active
NICD	National Institute of Communicable Diseases
NPC	National Planning Commission
OECD	Organization for Economic Cooperation and Development
PQLI	Physical Quality of Life Index
QLFS	Quarterly Labour Force Survey



RDP	Reconstruction and Development Program
RSA	Republic of South Africa
SA	South Africa
SARB	South African Reserve Bank
SARS-CoV-2	Severe Acute Respiratory Syndrome Coronavirus-2
StatsSA	Statistics South Africa
SDG	Sustainable Development Goals
UBPL	Upper-Bound Poverty Line
UN	United Nations
UN DESA	United Nations Department of Economic and Social Development
UNDP	United Nations Development Programme
USCCB	United States Conference of Catholic Bishops

## **CHAPTER ONE OVERVIEW OF THE STUDY**

### **1.1 PURPOSE OF THE STUDY**

This study seeks to investigate how John Wesley's economic ethics can be retrieved to foster economic development and be meaningful in the drive to emancipate South Africans from unemployment, poverty, and inequality. These are undesirable social ills, prompting the National Development Plan (NPC 2011) to acknowledge that South Africa's principal challenge is to roll back poverty and inequality through, amongst other strategies, sustained efforts to create employment for the citizens of the country, noting that unemployment and poverty are two different sides of the same coin.

Different views have emerged pertaining to the extent to which John Wesley's economic ethics can be applied to contemporary situations. Thomas Madron (1981:115) surmises that "Wesley's economic ideas are interesting and important, not because of the remedies he suggested or because of the particular theories he sets forth, but for the humanitarian spirit they exemplified – a spirit that well might be emulated by the church in the twentieth century".

Other scholars like MacArthur (1936:81) and Edwards (quoted in Madron 1981:114) posit that Wesley's call for state intervention in the economy was at best ambivalent. John Wesley is recognized for his contribution towards economic emancipation of the poor of his time (Marquardt 1992:24). The Holy Club, to which Wesley belonged, started what was called the Social Holiness movement, and which would later be regarded as a fundamental Wesleyan doctrine. Accordingly, the club evangelized prisoners, orphans and the poor and also provided financial assistance to empower the poor and prisoners. Despite his commitment to the enterprise of saving souls, Wesley had an uninspiring track record in the area of social (economic and otherwise) justice. It may appear that for him personal morality took precedence over economic justice.

## **1.2 Research Questions**

### **1.2.1 Key Research Question**

What is the relevance of John Wesley's economic ethics in contemporary South Africa with specific reference to unemployment, poverty and inequality?

### **1.2.2 Sub-Questions**

- (i) What are the basic tenets of John Wesley's economic ethics?
- (ii) What are the conditions that shape contemporary South Africa with reference to unemployment, poverty and inequality?
- (iii) How can insights gained from engagements with John Wesley's economic ethics be applied meaningfully towards the Church's approach on issues of socio-economic justice in contemporary South Africa?

### **1.2.3 Research Objectives**

- (i) To provide an understanding of perspectives of John Wesley's economic ethics as they pertained to 18<sup>th</sup> century England;
- (ii) To illuminate conditions of unemployment, poverty and inequality in contemporary South Africa;
- (iii) To evaluate whether there are insights that might be gained from the engagement of these perspectives (of John Wesley's economic ethics) with contemporary South African context;

## **1.3 PRELIMINARY LITERATURE REVIEW**

In this literature review the study intends to show that John Wesley's economic ethics have occupied space in the scholarly discourse as scholars wrestle with the extent of the applicability of these ethics to contemporary situations. The study will attempt to show that Wesley's teachings and thoughts on economic ethics can be re-appropriated and made relevant to South Africa's contemporary contexts (Maddox 1998:13). This literature review will seek to provide a comprehensive depiction of the historical context of Wesley's 18<sup>th</sup> century England and then present how Wesley's economic ethics evolved in that context and what these ethics entail.

18<sup>th</sup> century England was a political economy in transition, moving from an agrarian to an industrial economy and characterized by rampant poverty (Tyson 2014; Boyer 1990). Various taxes had been raised to finance the war against France, maintain the army and make interest repayments pertaining to the national debt. Interestingly, the 18<sup>th</sup> century was also a period of the Enlightenment with all its discoveries and assertion of human freedom. On a more positive note, citizens were experiencing increasing liberties, including the freedom of speech, that were unleashed by the Reformation which had taken place about two centuries earlier (Field 2015:2).

Slack (1990:52) points out that by the time of Wesley's ministry, *Act for the Relief of the Poor*, better known as the Poor Law had been in existence for over 100 years. The Poor Law was a nation-wide government sponsored program to provide relief for the poor. Slack (1990:22) further points out that the penetration rate of the relief program had increased to 14% of the population in 1799 from 4% in 1700. Notably, John Wesley must have known about this program because the majority of Methodists came from the background of poverty, and yet he never once mentioned the Poor Law (Hendricks & Hendricks 2015:66). Contrary to this silence, Wesley advocated for government intervention in opposition to Adam Smith (1723-1790), the pioneer of the political economy and renowned author of *The Wealth of Nations* (published in 1776) who propagated for wealth accumulation and *laissez-faire* capitalism (Madron 1981:114-115; Tyson 2014:170)<sup>1</sup> and yet never found it appropriate to give an opinion on this badly administered Poor Law.

It was in the same 18<sup>th</sup> century era that the public sphere had emerged as a platform for debate (Field 2015:1). Commentators like Wesley would print and distribute pamphlets to influence public opinion. Even though Wesley followed a strict regime of pietism (Hulley 2006:11), he partook in the public discourse by using pamphlets "to influence public opinion with the aim of fostering a society characterised by justice, mercy and truth" (Field 2015:2).

The writing, *Thoughts on the Present Scarcity of Provision*, is regarded as Wesley's most serious effort in addressing pressing economic issues of his time (Marquardt 1992:44). In the tract, Wesley laments the systemic inadequacies pervasive in the English economic system,

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<sup>1</sup> Skousen M, 2007. The Big Three in Economics: Adam Smith, Karl Marx and John Keynes, commends Wesley for his mantra Earn all you can, Save all you can and Give all you can, giving him some space alongside the three economists.

blaming poverty and hunger on scarcity, especially of work. He locates the source of scarcity, and subsequent poverty, on greed and crass consumption. In this writing, Wesley recommends government intervention on taxes, luxury horses and distilling of alcohol (Weber 2001:295). This call is however viewed by economists as unrealizable and naïve (Kingdon 1957:345). Yet Wesley was not always consistent, for he was silent on the Elizabethan Poor Laws (MacArthur 1936:81; Hendricks & Hendricks 2015:56).

Wesley created rules for most things. One such rule was the *Rules for the Helper*. In it, Wesley established a cardinal rule that stipulated that Methodists have no business other than to save souls (Collins 1995:82). James Cone (2010:35-36) criticizes Wesley for emphasising personal purity at the expense of social justice and contends that social justice must occupy centre stage in theology (Cone 2010; Hendricks 2006:31). Central to John Wesley's theology is the doctrine of Christian Perfection<sup>2</sup> (Kingdon 1957; Outler 1964), which is not only the focus of the sermon of Christian Perfection but is explained in detail by Wesley himself in *A Plain Account of Christian Perfection*.<sup>3</sup> An understanding of this doctrine is central for anyone who wishes to comprehend Wesley's theology and ethics. Here, John Wesley outlines in what ways he understood Christians to either be perfect or not perfect. Still in the sermon Wesley speaks of sanctification<sup>4</sup>, a doctrine which is centred on the ethic of love – the love for God and neighbour. For Wesley, the way to express this love is through his proposed economic ethics, ethics that sought to fight socio-economic challenges that faced the England of his time.

In *The Rules of the Steward, The Sermon on the Use of Money, The Sermon on The Good Steward, and The Sermon on Riches* John Wesley establishes the principles of frugality and simplicity of life as key to his economic ethics (Attwell 1989:113; Outler and Heitzenrater 1992). In addition, Wesley on *the Sermon of the Good Steward*, (Outler and Heitzenrater 1992), posits that human beings are stewards for God, entrusted with resources, that they

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<sup>2</sup> Kumalo (2009:29) has this to say about Christian Perfection: "The Methodist society requirements [for membership] were stricter than those of the Established (Anglican) Church. They required only one thing, "an entire earnestness in the life of faith" or as Wesley put it "a sincere desire to be saved from sin." The Methodist requirement for membership went further than the mere 'externals' of water baptism, credal confession and Communion, to that of maintaining a personal relationship with God. This personal relationship was taught through the doctrine of Christian Perfection".

<sup>3</sup> *A Plain Account of Christian Perfection* is a primarily tract that Wesley penned. It was also a subject of a sermon of the same title that he preached. In this tract Wesley expounds ways in which a Christian may be perfect or not perfect.

<sup>4</sup> Field (2015:6) defines Sanctification as God's action to restore "the moral image of God" in human beings.

must use, not as they please, but as God wills, i.e. they must use these resources to meet their basic needs and any surplus must be used for the benefit of others.

In a typical Wesleyan way, Wesley defined what he means by basic needs and uses the sermon on *The Use of Money*, to propose a three-fold approach to economic ethics with the mantra “[i]Gain all you can; [ii] save all you can; [and iii] give all you can” (Marquardt 1992:35).

A preliminary literature review of John Wesley’s sermons and writings reveals an interesting tension between his insistence on moral purity on one hand and pursuance of socio-economic justice for the poor on the other. The question, is it possible to pursue personal moral purity whilst also placing issues of justice at the fore? Liberation theology, according to Cone (2010:62), demands that the imperative of moral purity must not be advanced at the expense of justice. The study hopes to find a balance between personal morality and economic justice while undertaking this study.

This preliminary literature review has revealed disagreements amongst scholars as to whether Wesley ever advocated for government intervention in the economy as well as on the applicability of Wesley’s economic ethics to modern times.

#### **1.4 THEORETICAL FRAMEWORK**

To conceptualize the relevance of John Wesley’s economic ethics in contemporary South Africa, Klaus Nürnberger’s (1998) ‘Five Priorities on the Agenda’ is useful as a primary theoretical framework. In his book, *Beyond Marx and Market: Outcomes of a century of economic experimentation*, Klaus Nürnberger (1998:191-197) posits five priorities that must form an agenda for successful economic systems. These are: “(i) the preservation of the natural world; (ii) material sufficiency for all; (iii) equity in the distribution of inputs and benefits; (iv) concern for the weak and vulnerable; and (v) balance in the satisfaction of various kinds of needs”. Undergirding these priorities, is a norm of common good for all. History has revealed the inadequacies of ideologies and economic systems of the recent past, specifically capitalism and socialism, and how these systems have failed the litmus test of these priorities.

Unfortunately, Nürnberger (1998:186) premises this theory on pragmatism, evaluating his ‘Five Priorities on the Agenda’ by their practical application. This emphasis on pragmatism has the greatest potential to curb commitment to action. To mitigate against this potential flaw, the study will engage Gustavo Gutierrez’s (1988) theology of liberation as a secondary theoretical framework, aligning the research to the thinking that material poverty is not about laziness of the poor, but rather that poverty is a result of structured injustices and that all forms of poverty must be opposed. According to Gutierrez (1988) theology must privilege the experiences of the poor, pursue economic justice and result in faith that is underpinned by action. Emphasizing the liberation imperative of theology, James Cone (2010:ix) had this to say (in the preface to his book): “Any theology that is indifferent to the theme of liberation is not Christian theology”. Indeed, theology must make sense of the experiences of the poor, unemployed and marginalized of society. Obery Hendricks has another way of putting this imperative for liberation when he argues:

In practical terms this means that when we who claim to know God become aware that any of God’s children are caught in webs of oppression of mind, body, or spirit, it is our divine duty to struggle for the liberation and deliverance of our suffering neighbors in the same way that we would struggle for our own (Hendricks 2006:93).

The significance of using Gutierrez’s theology of liberation as a second framework will be to bring two dimensions, viz. the first being a perspective that comes from the global south<sup>5</sup> and the second being a commitment for action and praxis provided by the framework.

In the context of contemporary South Africa with huge rates of unemployment, poverty and inequalities (NPC 2011), it becomes even more appropriate to pursue a theology that takes the experiences of the poor seriously and which opposes all forms of injustices. Significantly, this stance must be undergirded by a commitment to action and praxis.

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<sup>5</sup> According to the UNDP, “‘Global South’ refers to developing countries located primarily in the Southern Hemisphere” [http://ssc.undp.org/content/dam/ssc/documents/exhibition\\_triangular/SSCExPoster1.pdf](http://ssc.undp.org/content/dam/ssc/documents/exhibition_triangular/SSCExPoster1.pdf) [Accessed on 30 April 2016].

## 1.5 RESEARCH METHODOLOGY

The study seeks to research John Wesley's economic ethics and its relevance to contemporary South Africa. In this researching this topic, there is a need "to identify the literature relating to it, to read the relevant parts of the literature, and to form views on it" (Levin 2005:54). In an effort to be faithful to the process alluded to above, the study will investigate the social, political and familial contexts that influenced Wesley's thinking and teachings. Specifically, the study will follow a textual analysis approach analysing various materials and sources, of primary and secondary nature in relation to John Wesley's economic ethics. The starting point of the study will be primary sources as represented by selected sermons of John Wesley, specifically those addressing economic issues, as well as his journals entries and writings. Three of the writings that are worth reviewing are *A Plain Account of Christian Perfection*, *Thoughts on the Scarcity of Provision* and *Thoughts of Slavery*, and all three are contained in *The Works of John Wesley*, edited by Gerald Cragg in 1987. In his lifetime, John Wesley wrote extensively in his journal, letters and sermons and published these. However, for the purpose of focusing my study, we will only review those primary documents that are relevant to addressing economic issues. We will also study secondary sources by scholars who have studied and written extensively on the work of John Wesley, especially on Wesley's economic ethics. We will move from sources on Wesley's life and theology, proceeding to sources that focus on Wesley's economic ethics, and finally limiting the focus of the study to those sources that seek to investigate a possible re-appropriation of John Wesley's economic ethics to specific contexts. To that effect, work done by scholars and commentators such as Kathleen MacArthur, Albert Outler, Richard Heitzenrater, Thomas C Oden, Manfred Marquardt, M Douglas Meeks, and Randy Maddox will be studied extensively, approaching the literature review thematically. There will be four main areas of focus in the study. Firstly, the study will seek to build a comprehensive understanding of life in 18<sup>th</sup> century England and in the Wesley household. Secondly, the study will seek to unearth the principles that underpin Wesley's economic ethics. These may be found in his many writings, sermons and commentaries from secondary sources. Thirdly, the study will seek to create an understanding of the contemporary South African context, illuminating the socio-economic justice issues of unemployment, poverty and inequality. For information on this context and economic performance and disparities in South Africa, the



study will consult documents such as the United Nation's Human Development Index (HDI), selected reports of Statistics South Africa (StatsSA), and the National Development Plan.

In undertaking an analysis of the Human Development Index (HDI), National Development Plan (NDP) and various publications of the Quarterly Labour Force Survey (Q4:2011, Q4:2015, Q4:2019, Q2:2021 & Q4:2021) data, we will seek to gain a more comprehensive understanding of the state of unemployment, poverty and inequality in South Africa, and trends that have been established, resulting in establishing a situational analysis. In particular, the study will focus on the following areas:

- Demographics (race, population, population growth rate, gender),
- Discrimination (by race, gender, age, *etc.*)
- Gender equality (by education, race and age *etc.*)
- Policy environment
- Poverty levels,
- Employment and wages (educational level, formal and informal),

To assist the process of analysis, the study will focus specifically on data that is disaggregated, that is, data already broken down into categories such as race, age, gender, *etc.* Disaggregated data is seen as generally more useful and informative than aggregated data (McCaston 2005). The study will then compare the results of this analysis with best practices as offered by UN bodies.

Fourthly, the study will attempt to create an intersection between John Wesley's economic ethics and issues of unemployment, poverty and inequality in contemporary South Africa, and evaluate whether these economic ethics can be applied in meaningful ways in contemporary South Africa.

## **1.6 CONCLUSION**

The study hopes to shed more light on: (i) a possible balance between personal morality and social justice in John Wesley's economic ethics; (ii) whether or not Wesley was ambivalent in his call for government intervention, if any, in the market; and (iii) the extent to which John Wesley's economic ethics may be re-appropriated in contemporary South Africa.

## CHAPTER TWO

### A CONTEXTUAL REVIEW OF 18<sup>TH</sup> CENTURY ENGLAND

#### 2.1 INTRODUCTION

In order to do justice to any investigation of a subject matter, a study should be properly located in its context. In assenting to this view, González points to “a bipolar relationship between the past and the historian’s own perspectives and interests” (1990:xi). Gutierrez puts it succinctly when he contends: “a people that knows the past that lies behind its sufferings and hopes is in a better position to face and reflect on the present” (1988:xxxv). The same is true of a study of John Wesley’s economic ethics. The rationale for studying the historical context in which John Wesley grew, taught and lived is captured powerfully by Albert C. Outler when he asserted that John Wesley “is more fruitfully understood in terms of his own background and context than in the light of the evolution of the Methodist movement after his death” (1964:vii) and “more than most theologians, he [John Wesley] needs to be analyzed in terms of his historical context and the pressures that shaped his thoughts” (1964:33).

This chapter serves as a rear mirror view of the eighteenth century, focusing on the period before and during the century. The period before the century provides us with a foundation for the context of the actual century itself, and my focus thereon will be to illuminate some of the most important events that had a bearing on the century. I will proceed to chart out the political atmosphere during the eighteenth century with emphasis once more on major events, wars and rebellions during that period. For this prelude to the 18<sup>th</sup> century, I will be relying on the work done by Kenneth Collins and Richard Heitzenrater<sup>6</sup>. The rationale is to illuminate historical events that shaped the 18<sup>th</sup> century and are relevant to the life and work of John Wesley. To achieve this, the study has chosen to explore the work of Kathleen Wilson<sup>7</sup>, a professor of history at State University of New York and a renowned scholar of 18<sup>th</sup> century

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<sup>6</sup> Kenneth Collins is a professor of Historical Theology and Wesley Studies at Asbury Theological Seminary and a member of The Wesley Historical Society (Retrieved from <http://asburyseminary.edu/person/dr-kenneth-j-collins/> on 26 September 2016). Professor Richard Heitzenrater is best “known for “breaking the code” of Wesley’s personal diaries, Heitzenrater is General Editor of the Bicentennial Edition of the Works of John Wesley, which includes his work in the seven volumes of *Journals and Diaries*” (retrieved from <https://divinity.duke.edu/faculty/richard-heitzenrater> on 05 April 2016).

<sup>7</sup> Kathleen Wilson is also “Past President of the American Society for Eighteenth Century Studies”

England. This will be supplemented by the scholarly work of Norman JG Pounds, the late emeritus professor of history and geography at Indiana University.

Finally, the study will sketch an in-depth review of the English Poor Law, how it developed and how it was managed and implemented. To this effect work by Paul Slack and George Boyer will be consulted<sup>8</sup>.

In addition to the above, the study will also be exploring two other themes throughout this historical review. The first theme discusses the effects of enclosures on poverty and unemployment whilst the second discusses the effects of hegemonic ordering of society on the reality of inequality. These themes will run pervasively in the review which will be undertaken with a focus on the social ills of unemployment, poverty and inequality during the 18<sup>th</sup> century whilst attempting to understand how society was stratified as well as how it responded to these social ills in the context of the social, political and economic realities of that time.

In the final analysis, the aim of this chapter is to outline a comprehensive picture of life in 18<sup>th</sup> Century England, placing special emphasis on the period from around 1725 to 1791, which was the period of Wesley's productive adult life until his death. It is a hypothesis of this study that events during this time period contributed and shaped the development of his economic ethics.

## **2.2 PRELUDE TO 18<sup>TH</sup> CENTURY ENGLAND**

From the 16<sup>th</sup> century, England had begun a process of enclosure, the process in which common land was subdivided and fenced off into individual plots and allocated to people deemed deserving, usually the powerful gentry. Common land (supposedly surplus land) was appropriated from peasants and rented back to them by the same dispossessing lords, who

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<sup>8</sup> Professor Slack is a British historian who declares that his "research interests lie in the social and economic history of England from the 16th to the early 18th centuries" (From British Academy Website <http://www.britac.ac.uk/users/professor-paul-slack>, [Accessed on 22 September 2016] and his scholarly insight will benefit this study. Boyer is Professor of Labour Economics at Cornell University and a member of the editorial board of the Journal for Economic History. His work will bring in a different perspective, to the discussion on the English Poor Law.

The study has chosen the authors mentioned above based on the extensive scholarly work they have carried out, and also to cover the various aspects of the eighteenth century that the study has identified as important in the study. The authors and the associated sources form the basis of this chapter and where necessary have been supplemented by other relevant sources.

have now been turned into landowners. Divergent views prevail about the merits or otherwise of the enclosures. One school of thought believes that these measures were necessary in order to foster economic development, whilst an opposing view holds that enclosures have deprived the poor of their primary source of livelihoods, that is, agrarian land, leading to massive displacements. Whatever school of thought one may subscribe to, what is unquestionable is that enclosures led to massive displacements and rural de-population (Fairlie 2009:12). The poor were indeed deprived of their means of livelihoods and production and levels of inequality were increased and levels of unemployment increased (Zmolek 2013:3-4).

The eighteenth century was preceded by the Glorious Revolution of 1688-89 (Collins 2003:13) whose chief protagonist was King William (Collins 2003:16) and which secured a constitutional monarchy for England. By this time parliament had assented to the 1689 Bill of Rights which secured the civil rights of citizens of England and limited the powers of the monarch and effectively created a separation of powers. In addition, the prohibition of Catholics and/or persons married to Catholics from becoming monarchs in England was made law. Wesley lived most of his life during the context of the Hanoverian age<sup>9</sup>.

During the 17<sup>th</sup> century, the Scottish House of Stuart, which was the reigning monarchy in the kingdoms of Scotland, Ireland and England, had running battles with parliament (Collins 2003:12). By the 18<sup>th</sup> century, English Prime Ministers had increasingly taken control of Parliament and the power of the monarchy reduced.

The 1701 Act of Settlement came to pass as a result of contestations for the control of the Church of England between the Catholics on one hand and Protestants and Puritans<sup>10</sup> on the other. Almost two centuries earlier, in 1534, the Church of England had separated from the Catholic Church after Pope Clement VII denied a request by King Henry VIII to annul his

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<sup>9</sup> The Eighteenth century was for England, a century that covered a large part of the Hanoverian Age (1714 – 1837), a 123-year era which begun in 1714 with the coronation of King George I and ended in 1837 with the death of William IV. It had been preceded by Queen Anne's reign, who ruled from 1702 to 1714, and was the last monarch of the Stuarts' empire. A year before Queen Anne's ascension to the throne (i.e. in 1701), parliament enacted the Settlement Act which was designed to prohibit anyone who was Catholic or married to a Catholic from inheriting the throne, and paved a way for the establishment of the Kingdom of Great Britain. When Queen Anne died childless in 1714, those who were apparent 'heirs' were overlooked and she was succeeded by her third cousin from a German town of Hanover, viz. King George I, culminating in the British monarchy changing from Scottish to German.

<sup>10</sup> The Puritan way of worship was opposed to rituals asserting that these were unscriptural and was directed in favour of tenets of Christianity. (Field, 1998:13). The objective of Puritanism was to purify the church of Roman influence.

marriage to Catherine of Aragon (Heitzenrater 2013:6). Even after the separation, Henry, as head of the church, followed Catholic practices and opposed Protestantism, leading to some Protestants (and some Catholics) being charged with and tried for heresy. Henry's son, King Edward VI (who ruled from 1547 to 1553), was more sympathetic to Protestants, and during his reign allowed Protestants to influence the liturgy and church worship. The Book of Common Prayer (1549 and revised 1552), which had the older Catholic liturgy as its foundation and yet influenced deeply by Protestant principles, was introduced by Archbishop Cranmer in both years (Heitzenrater 2013:6). For the Church of England, Apostolic Succession was paramount, and all efforts were made to ascertain that it was not broken (Heitzenrater 2013:6). Edward was succeeded on the throne by Queen Mary I, who co-reigned with her husband King Philip, bringing to a halt, the reformation that had taken place thus far (Heitzenrater 2013:7). They re-established communion with the church in Rome, and believers were forced to recant their Protestant beliefs and refusals were met with burning. Mary earned herself the nickname "Bloody Mary" as numerous Protestants were martyred, including the burning of Archbishop Thomas Cranmer, bishops Hugh Latimer and Nicholas Ridley who have come to be known collectively as the Oxford martyrs (Heitzenrater 2013:7).

After her death, the childless Mary was succeeded by her half-sister, Queen Elizabeth I who worked tirelessly to restore the posture adopted by the church. In 1559, Queen Elizabeth I re-established both the independence of the Church of England from Rome, and the use of the Book of Common Prayer through what has come to be known as the Elizabethan Settlement (Heitzenrater 2013:7). Heitzenrater captures the intention succinctly:

The task of the religious settlement under Elizabeth was to establish a balanced approach that would protect the national church, formed (if not fully "reformed") under Henry, from the traditional "catholic" claims of Rome on the one side and from the more radical "reform" tendencies of the Puritans on the other, a stance traditionally expressed as the *via media* ("middle way") between Rome and Geneva (Heitzenrater 2013:8).

It was during this era that the English Poor Laws were first introduced. The Elizabethan Era was immediately followed by the Era of the House of Stuart, and for the next century, more contestations between Puritans/Protestants (the so-called low churchmen) and high churchmen who preferred communion with the Catholic Church ensued as the throne

oscillated between the two postures. These contestations were meant to be addressed by the 1701 Settlement Act (Heitzenrater 2013:8).

## 2.3 THE POLITICAL CLIMATE DURING 18<sup>TH</sup> CENTURY ENGLAND

Heitzenrater (2013:3) contends that throughout the 18<sup>th</sup> century, the monarchy was the dominant feature of English politics. Furthermore, Heitzenrater contends that:

religious reformers gained some renown for their ideas and programs, especially on the continent, the implementation of their reforms depended in large part upon the wishes and whims of their political power structure – in many areas ... the fate of reform movements hinged upon the positive or negative inclinations of individual monarchs or princes (Heitzenrater 2013:3).

Thus, the 18<sup>th</sup> century began with the last of the Stuarts monarch and ended with a Hanoverian reign<sup>11</sup>. However, the Jacobites were opposed to Hanoverian rule and on the same side with the Tories opposing the Whigs:

Further, the Whigs' historical association with a wider Protestant toleration encouraged their current identification with nonconformity. Since the Restoration, dissenters had peopled the High Church imagination as the primary domestic political other that the nation had to fear, ceaselessly plotting with their republican allies the destruction of church and monarchy. Since the post-succession period, the

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<sup>11</sup> It was during this time that Britain was considered the most powerful state in the world marked by internal stability and economic prosperity. The country was ruled by the House of Hanover and was under the rule of successive kings George.

Although the country experienced internal stability, it was paradoxically involved in at least four major wars in the same century, viz. the war of Spanish Succession, the War of Austrian Succession, the seven-years war with France and the war in North America – American Revolution. It was also during the eighteenth century that the first 'real world war' took place, in the form of the seven-year war between Britain and France. Although the actual war lasted seven years from 1756 to 1763, it was nevertheless a 23-year war which started with the War of Austrian Succession in 1740.

The war of Spanish Succession (1702-1713), arose when England, together with her allies in the Holy Roman Empire, sought to block King Louis XIV of France from positioning France as a dominant world power through the ascension to Spain's throne by King Louis XIV's grandson after the death of the childless King Charles II of Spain. The English discerned a looming danger in their own royal succession should Louis XIV get hold of control of Spain (MacArthur 1936:7). The war left England with a huge national debt.

There were effectively two prominent political parties in the Kingdom of Great Britain during the century. The Whigs were political allies of Hanover dynasty, and the Tories were High Church proponents and supporters of the House of Stuart.

Presbyterians emerged as the most hated variant of dissent, as evinced by High Church crowds' propensity to attack their meeting-houses over others in certain areas (Wilson, 1998:107).

The Presbyterians were the most successful and were the richest denominations of the nonconformists in England (Wilson 1998:107). Together with the Quakers, the Presbyterians were also the most vocal of nonconformists and challenged the economic and political establishment of the day (Wilson 1998:107).

The early years of the Hanoverian rule were characterized by unrelenting Jacobite sponsored rioting and occasional instabilities propelled by a Stuart-backed rebellion, associated with purging of Tories in state institutions as the Whigs sought to consolidate their hold on power (Wilson 1998:84-5).

To completely dislodge the Tories from positions of power and influence was not an easy task for the Whigs. They engaged in extensive campaigns to promote the king's cause, and related to that, their own, organising resources, personnel and electoral support in the wards (Wilson 1998:86). Without hesitation, the propaganda machinery was successfully deployed and intensified as "press, pulpit, theatre and political calendar were all utilized to lambast the alleged long-standing Tory disaffection to the Protestant succession and allow the Whigs to parade as the only alternative to Catholic absolutism" (Wilson 1998:86). In the meantime, the Hanoverian ascension was presented as "deliverance". As the bashing of the High Church tendencies of the Tories was promoted, a narrative was developing that loyalty to the House of Hanover was 'deliverance' and this was being entrenched in the body politic. This deliverance was, by extension, perceived to be loyalty to the Whig party<sup>12</sup>.

The Tories were demonized, maligned as treasonous and identified with subversion of authority and essentially Jacobite (Wilson 1998:92,96). Wilson (1998:97) asserts that the effectiveness of the propaganda could be seen in George I himself embracing the Whigs, almost exclusively, and disregarding the Tories in matters of state. This strategy also brought the erstwhile Dissenters to the centre in the eighteenth century, and the Whig catchment was

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<sup>12</sup> For purpose of emphasis, Wilson (1998:88-89) makes the point: "In addition, pamphlets, sermons, plays, broadsides, ballads and periodicals were all exploited to whip up enthusiasm for the Whig and Hanoverian cause, disseminated throughout the nation via chapman, hawkers, news agency and booksellers. For example, between 1714 and 1718, dozens of single-sheet poems and songs and a number of ballad collections were produced honouring George I".

much broader than just dissenters and included merchants, the lesser tradesmen and artisans. This was a fairly broad but heterogeneous support base made up of people of diverse backgrounds and occupations. To their credit, the Tories also embarked on similar and reciprocal strategies, making it difficult for the Whigs to completely wipe them off the face of English political life (Wilson 1998:109). The common theme of Tory rebuttal was the alleged unlawfulness of the Protestant Succession and that it lacked hereditary basis (Wilson 1998:115). To rub salt to the wound, the Hanoverian dynasty was foreign, in language, nationality, religion and sensibilities and thus lacked legitimacy and was seen (at least by the Jacobites) as a source of all debauchery. In order to remain politically relevant, the Tories had to shake off the Jacobite association. By the late 1720's, a marked shift had occurred in political culture, "from Jacobitism to libertarianism as a rallying as the idiom of popular protest" (Wilson 1998:117).

The dark side of the Whig strategy was its resort to using state resources to repress any form of dissent (Wilson 1998:98). Whig loyalists such as magistrates, troops and law enforcement agencies were given free reign, often harassing and sometimes killing Jacobites and Tories who participated in demonstrations or were even suspected to have so participated. All these atrocities justified in the name of the people were meant to thwart the threat from the Stuarts and Jacobites. Even electoral fraud was justifiable as defending the Deliverance and peoples' power. The Whigs, who were chief proponents of liberties and rights in the era leading to the Glorious Revolution, were now working against the same noble principles they so proudly advocated for in the past (Wilson 1998:114). In the process of ostracising the opposition, the Whigs trampled on civil liberties and reversed the gains ushered in by the Glorious Revolution of 1688, as enshrined in the 1689 Bill of Rights.

By 1721 the Jacobite threat to the Whig hegemony had abated and King George I appointed Robert Walpole (in 1721) as the first Prime Minister of England as well as the First Lord of the Treasury (Chancellor), both positions Walpole held for 21 years, until 1742. As Chancellor, Walpole is credited with restoring the tarnished credit rating of the British government, consequent to the South Sea Bubble financial crisis of 1720.

In 1723 Walpole introduced the Black Act, and act of parliament, which was meant to respond, albeit viciously, to the "increasing resistance to the enclosure of woodlands" (Fairlie 2009:12). The process of enclosures had accelerated by the early 18th century as wealthy



landowners proceeded to enclose forests for parks denying commoners access to firewood, water and grazing for their animals, making life even more difficult for the poor. The Black Act carried with it, a death penalty and the poor were the ones who mostly fell victim to the law, which remained on the statute books until a century later. The law entrenched poverty, inequality and unemployment amongst the ranks of the commons for over a century.

Walpole proposed to introduce the salt bill of 1732 and the excise bill of 1733, both of which attracted major opposition and led to an excise crisis which culminated in a reduced majority after the parliamentary elections of 1734 (Wilson 1998:129). “The anti-excise agitation thus marked the emergence of trade as a “patriotic” political issue, one that placed commerce at the center of the national interest and highlighted the monopolizing tendencies of the Walpolean state with regard to power and property” (Wilson 1998:129-30). At issue, primarily, was the ubiquitous excise officers who were given unparalleled search and seizure powers. This was generally viewed as another curtailment of civil liberties.

Following the excise crisis and the resultant 1734 elections outcome, Walpole tried, albeit largely unsuccessfully, to counter the participation of extra parliamentary activism, by arguing that those out of parliament ‘had no right to meddle in public affairs’ advocating for passive obedience and non-resistance (Wilson 1998:134).

This feat by the opposition was repeated in the 1740 elections following Admiral Edward Vernon’s success in the battle with Spain. The people had been in overwhelming support of a war against Spain, to protect British property and interest, but government disregarded this primary duty to the citizens (Wilson 1998:161). The opposition groupings lauded Vernon’s victory in Porto Bello which was achieved amidst uninspiring support from the government. Vernon had become a national hero and his “popularity and identity as an opposition hero imparted renewed enthusiasm for the anti-Walpolean campaign out-of-doors [extra parliamentary], leading to political initiatives that often had concrete electoral results” (Wilson 1999:150). He had also proven himself as a supporter of the Hanoverian dynasty and thus could hardly be accused of disloyalty to the throne, and in an important way, lending much needed credibility to the cause of the opposition which had been damaged by association to and perceived anti Hanoverian sentiments. Serving in the War of the Spanish Succession early in the century, Edward Vernon moved to arrest a captain whose ship had celebrated the birthday of the Pretender (Prince Charles Edward the son of King James II)

and brought him to London in chains (Wilson 1998:162). This deed would prove decisive in portraying Vernon's loyalty to the House of Hanover at the time when he could potentially be accused otherwise.

Wilson summarises the challenge that the Pretender faced:

For urban observers, attuned to issues of trade and empire, national aggrandizement and loss, the problem with the Young Pretender was not only that he was Catholic but that he was backed by the French, and the French presented the gravest threat to Britain's national and imperial standing and identity; their motivation for supporting a Jacobite invasion seemed all too evident (Wilson 1998:172-3).

The Whigs had up to this far managed to exclusively appropriate Hanoverian loyalty to themselves, and as such Vernon presented a fresh and rare opportunity to reposition the Tories in particular and the opposition in general. The continued lacklustre support by government of war efforts finally claimed the political career of Walpole in February 1742. This was after government failed to send the necessary land forces to support Admiral Vernon in the attack on Cuba in late 1741. The war turned out to be a disaster and Vernon failed to be victorious in Cuba. Walpole's fall brought much jubilation in the country (Wilson 1998:162-3). William Pitt, who had supported the war all along succeeded Walpole as the Whig Prime Minister. Pitt vigorously pursued foreign expansion and had a preference for the navy over the army for battles and wars.

In 1745, the Kingdom experienced what has been famously known as the Jacobite Revolution. The House of Stuart had not given up on the British throne and launched an attack with the purpose of regaining control of the monarchy that they had lost in 1714 to the House of Hanover. This uprising occurred at the height of the War of Austrian Succession (1740-1748) in which Britain was involved and was timed when most of the country's army was deployed in Europe away from home. The Jacobite army secured early victories before Britain recalled some of her army from the continent and finally inflicted defeat on the Jacobites (Wilson 1998:167-8). Strategically, and having managed to shake off Jacobite identity of the early century, Tory gentlemen did not identify with the Jacobite Revolution (Wilson 1998:170). During the rebellion, government launched a massive and successful propaganda campaign emphasizing the need for unity and rode on the sense of nationalism

pervading society since Vernon. It is not surprising therefore that the first line of defence against the Jacobite rebels was provided by volunteers (Wilson 1998:171-2).

On the positive side, the rebellion solidified British nationalism as a central theme and continued its expansion beyond the Whigs. William, Duke of Cumberland, the son of King George II, emerged as a hero from the rebellion affirming the House of Hanover as deliverers with his victories over the rebels. Sadly, his brutal treatment of the rebels earned him the nickname ‘the Butcher’<sup>13</sup> (Wilson 1998:174-5).

A decade later Britain and her allies fought against and ultimately defeated France and her allies in what became known as the seven-years’ war. The war raged across five continents, that is, all over the world, and to it is attributed the title of the first real world war. Before the war, Britain had established supremacy in sea battles with its superior warships, which could be regarded as key weapons of the time and clearly most sophisticated of that time. By the end of the war in 1763, Britain had replaced France as the dominant power in North America and was firmly consolidating her position in world trade (Wilson 1998:193). King George III, tired of the ongoing war, negotiated peace with France, ultimately ending the seven-years war<sup>14</sup> and granting concessions to France appeasing her bruised ego. Thus the 1763 Treaty of Paris was sealed. Interestingly, it was the French King Louis XIV who first issued peace talk invitations.

At home in England, the American Revolution triggered widespread polarization of English society as petitions and counter petitions became the order of the day (Wilson 1998:238-9).

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<sup>13</sup> More than 2,000 Jacobites were killed in a revolt that lasted until 1746. British forces hunted and killed persons who partook or were suspected of taking part in the revolt. Hundreds of people were executed following brief trials. About a thousand of convicts were sold to the Americas as slaves to labour in plantations. More than 700 died in prison ships in the Thames River in London. Invariably, the Jacobite uprising led to massive abuses and killings by government troops and associated agencies.

<sup>14</sup> The seven-years war had been sparked by the acts of George Washington (mandated by Lieutenant-Governor Dinwiddie), who was then the Lieutenant Colonel of Britain in North America. France and Britain were in dispute over borders and Washington attempted to force the French out of the disputed territory. The attempt was met with resistance from the French who humiliated Washington and his troops with defeat in battle. Ironically, the same Lieutenant Colonel George Washington would later turn against Britain and led a rebellion during the American Revolution (1775 -1783) marshalling a group of inexperienced soldiers to victory over the well-oiled war machinery and naval equipment of Britain, using guerrilla tactics. Thirteen American colonies had started rejecting British rule as early as in 1765 engaging in protests which escalated into fully blown war by 1775. The American rebels wanted independence from Britain and were not willing to continue paying taxes to Britain without representation. For instance, the first direct tax form imposed by England on the colonies, the 1765 Stamps Act, experienced bitter opposition in the same colonies. With help that came in later years from France followed later on by Spain and the Dutch, the rebels secured victory over Britain and consummated their Declaration of Independence. In a sense, victory in the American Revolution signified sweet revenge for the French over Britain.

“The animosities provoked by these rival efforts to mobilize public opinion were fierce, and the provincial press was filled with the allegations and slurs of contending parties” (Wilson 1998:239). Significantly, “the majority of total signatories favoured peaceful concessions rather than coercive measures” (Wilson 1998:239). The American War had become a contentious issue used even in parliamentary elections in many constituencies. John Wesley and Josiah Tucker were the leading clergymen who were proponents for the monarch’s cause for the American Revolution (Wilson 1998:241). In contrast Rev Rees David, a Baptist minister as well as Richard Watson and William Crowe from the Anglican Church, “utilized their pulpits to promulgate sympathy for the colonists’ position or amplify anger toward the government” (Wilson 1998:246). As tensions escalated, some anti-war activists refused to participate in royal celebrations such as the king’s or queen’s birthday celebrations, which naturally buoyed the enthusiasm of loyalists. The citizenry became increasingly subjected to suspicion of subversion of authority and even treason for holding anti-war views (Wilson 1998:244).

MacArthur (1936:10) contends that, decades before the American Revolution, the pervasive contestations between the Tories and the Whigs and the political struggles of the time had the effect of weakening the state of the Church in England during the 18<sup>th</sup> Century.

## **2.4 SOCIO-ECONOMIC CONTEXT OF 18<sup>TH</sup> CENTURY ENGLAND**

Life in 18<sup>th</sup> century England was full of contrasts (Porter 1982:30; Tuttle 1978:32). In addition to the peace that prevailed throughout the kingdom, there was also a general pattern of increasing prosperity, especially for the elites. Amid increasing prosperity:

suffering was *everyone’s* lot sooner or later, low- or high-born.

Physical pain, a great leveller, was always awaiting it’s cue. There were no anaesthetics, and alcohol was the best pain-killer. People had to cope philosophically, and religiously, with disease (but the English were also noted for suicide) (Porter 1982:30).

Disturbingly, Tuttle (1978:32) notes that a larger number of the population was diseased and hungry. Human life was not valued. Child labour was widespread, and children were beaten up at their workplaces, at school and even at home. As for criminals, there was no mercy for

them. They were often whipped publicly, or worse hanged (Porter 1982:31). Wesley recorded in his journal that he watched as a ten-year old boy was hung for stealing a mere loaf of bread (Tuttle, 1978:32). Vulgar was the common language and reputation was gained by the amount of alcohol consumed as well as how much of a beating a person could endure. Debauchery was a rampant norm in society and affected all levels of society (Tuttle 1978:32). Notably, “people almost never bathed. Before cottons became cheap, clothes were difficult to wash; children in particular were often sewn into theirs for the winter” (Porter, 1982:33). Stench of garbage, human waste and roaming animals could be smelt everywhere – it was common for human beings to live with their animals under the same roof (Tuttle 1978:31; Porter 1982).

Women were largely marginalized even when the population was made up of more women than men. Porter asserts that “slightly over half the nation’s was female (1982:35). Yet, compared with men, we know little about what women felt, thought, and did” (1982:35).

18<sup>th</sup> century England was a political economy in transition, moving from an agrarian to an industrial economy. Displacements were rampant and poverty endemic (Tyson 2014). More and more men left their homes for towns and cities in search of greener pastures and a pattern “of the man at work and the woman at home” developed (Porter, 1982:47). In addition, the economy was under extreme pressure as people had less income at their disposal. The national debt had ballooned and the war with France had placed huge demands on the economy (Porter 1982:47). In an attempt to finance these spiralling expenses (including funding the war and maintaining the army) and interest repayments, a number of taxes were introduced causing further burdens to an already over-burdened populace. Invariably, the poor were the most affected by these measures (Porter 1982:47).

Furthermore, marriage was not difficult to contract in 18<sup>th</sup> century England and as a general principle, pledges made between a man and a woman towards marriage in front of witnesses “constituted irrevocable commitments for life” (Hibbert 1987:381). Even though there were variations of these marriages (from proper to clandestine marriages) depending on contexts, it was however generally accepted that mutual undertakings that had witnesses constituted binding marriages (Hibbert 1987:381-2). It was not until 1754 that clandestine marriages were outlawed through the agency of 1754 Marriage Act, promulgating only marriages that took place in a church lawful and requiring that all marriages be entered into the parish

register (Hibbert 1987:382). “Love was rarely a matter for consideration in most upper-class marriages” (Hibbert 1987:383). The 18<sup>th</sup> century was also characterized by short life expectancy and those people who reached seventy, few as they were, were considered to be too old (Hibbert 1987:386). A consequence of this high mortality rate was that most couples were married for about twenty to twenty-five years and remarriages were common on the death of the first spouse (Hibbert 1987:386). John Wesley himself was a bachelor who at 48 years of age married a widow, Mrs Mary Vazeille. “Contrary to popular belief families were not large, even though many women spent most of their adult lives pregnant. From the late sixteenth century until the early twentieth the average size of a household in England was less than five people” (Hibbert 1987:386)

It was common for citizens, and even clergy, to be sent to prison for unpaid debts (Hibbert 1987:382). John Wesley’s father, Rev. Samuel Wesley, also experienced this misfortune, spending some time incarcerated in prison (Outler 1964:5). Hulley (2006:2) contends that Rev Samuel Wesley seemed incapable of managing his finances even though he earned a reasonable income. He was accordingly in debt, which led to him spending time in prison for failure to service and settle these debts (Tuttle 1978:40; Outler 1964:5).

As part of the analysis of the 18<sup>th</sup> century English context, the study will now explore the Elizabethan Poor Laws whose objective was to help alleviate poverty among the vulnerable, in the next section.

## **2.5 THE ENGLISH POOR LAWS**

The English Poor Laws were first enacted as acts of parliament in 1597 and 1601 during the reign of Queen Elizabeth I and made the responsibility of parishes to maintain the poor in their territory (Boyer 1990:1). These laws were introduced primarily as a response to four successive seasons of poor harvest prior to 1597 as well as an increasing population (Boyer 1990; Slack 1990:3). Furthermore, these laws represented the clearest attempt by the governing authorities to address poverty and destitution that was prevalent in the land.

To bring a perspective to what a parish represented, it is worth noting that parishes at the introduction of the English Poor Law looked nothing like they do now. Parishes were secular demarcations of land for administrative purposes and did not necessarily have churches and

priests as integral parts thereof (Pounds 2000:3). Illuminating the secular dimension of parishes, Pounds describes one of the functions of the parish in this way: “through its elected officials [the parish] kept road and bridges in at least a usable condition” (2000:4). Evidently, the parish was the central unit of local governance (Boyer, 1990:1). It was only in the eighteenth century that the secular role of the parish had begun to decline (Pounds 2000:4). So clearly the obligation that was placed on the parish by the Elizabethan Poor Law was not placed on the church, as it were. In recognising the parish as a functional unit of administration, “the 1536 Act marked a shift of emphasis away from hundreds, manors and courts leet, which were alternative units for social regulation, and begun a construction of the ‘civil parish’” (Slack 1990:10).

Slack (1990) proposes three possible schools of thoughts for the introduction of the English Poor Laws. The first is aligned with what has already been illuminated above and is referred to as the ‘high pressure’ interpretation. According to this school of thought, population increases, and economic circumstances triggered the introduction of the Elizabethan Poor Law. A 1552 survey of the poor across London revealed an abundance of “poor men overburdened with their children” and “decayed households” (Slack 1990:4). It was common to find citizens who were engaged in honest work with all their zeal and yet were unable to fend for their families. Slack (1990:4) also observes that if indeed poverty was triggered by these pressures, it would be difficult to follow the same logic and explain the existence of the poor during low pressure periods, for instance during the century from 1660 to 1760.

The second school of thought is based on the changed perception of society about what government could do for the poor as stirred by humanism, Puritanism or Protestantism (Slack 1990:6-7). This interpretation acknowledges that prior to 1500, monasteries, parishes and guilds played key roles in canvassing resources for the relief of the poor. Governments throughout Europe, both in Protestant and Catholic countries had begun to undertake humanitarian initiatives, thus centralising poverty relief efforts. This was further fuelled by the new optimism on the ability of government to lead social engineering initiatives (Slack 1990:6-7).

The third school of thought addresses reasons for the introduction of Poor Laws and, according to Slack (1990:8-9), centres around the law as a means of controlling behaviour. He posits that these laws were introduced to be both punitive and inspiring in nature,

prohibiting some behaviour through punishment whilst promoting others through encouragement (Slack 1990:9). In these instances, the law was used to punish idleness and vagrancy whilst incentivizing work through payment of doles. There was, accordingly, a clear intention by law makers to achieve certain preferred outcomes (Slack 1990:9). The chief assumption was that idleness was the root of all evils, and rooting it out would help eliminate poverty, together with associated ungodliness (Slack 1990:16). Slack (1990:16-17) concludes that the introduction of the English Poor Law was probably a result of aspects of all three schools of thought.

In 1552, parliament introduced parish registers for the poor, the aim of which was to maintain a database of all poor people in a parish. By 1563, different categories of the poor were acknowledged for the first time (Slack 1990:9). The three categories introduced were (i) those who were willing to work but could not (the able bodied), (ii) those who could work but were not willing to work – the so-called idle poor or vagrants, and (iii) the infirm or deserving poor, viz. the ill, old and too young to work (Slack 1990:9-10). Work was created for the first category of the poor and these poor people were left to stay in their homes. The second category, that is, the idle poor, were whipped and flogged in public and forced to work. The hope was that the public whipping would make them learn the mistakes of their ways and persons in this category were placed in workhouses (Slack 1990:10). The deserving poor, the poor of the third category, were placed in local alms houses or poor-houses. Orphans were housed in orphanages and the sick in hospitals (Slack 1990:10). Accordingly, two types of relief were available. Firstly, there was outdoor relief, which was meant for the able bodied. In terms with this relief effort, able bodied poor persons were either given work to do or a ‘dole’ of money for subsistence (Boyer (1990:10). The indoor relief was the second type of relief and was given to the deserving poor and the able bodied who refused to work (second category of the poor also referred to as the idle poor or vagrants). In terms of this relief type, the idle poor would be set to work and the infirm looked after (Boyer (1990:10).

Boyer (1990:10) posits that the outdoor relief was run on a basis of allowances by which a labourer, whether employed or not, was guaranteed to receive a minimum weekly amount which amount was based on the size of the labourer’s family and the price of bread.

Available evidence suggests that outdoor relief allowances were payable as early as the beginning of the eighteenth century, but increased significantly after the 1763 peace treaty, as



a result of increased pauperism even in the midst of expanding trade and prosperity (Boyer 1990:23-4).

Parish members were empowered to elect, every year during Easter, two overseers (later a board of overseers) to administer the Poor Laws in their parishes. It was also at these Easter meetings that the rates of dole payable to the poor were agreed upon (Slack 1990:19). The overseers were responsible, among other things, to determine the rates that were to be levied on property holders as collection for the poor as well as to implement the two relief programmes in their respective parishes. In practice, these determinations were usually arbitrary (Slack 1990:19).

The position of an overseer was not a remunerated position. As such, the system was open to abuse and invariably, corruption crept in as overworked and 'not remunerated' overseers found creative ways of making their positions worth their time (Slack 1990:37). Slack points out that the 1692 amendments to the Poor Laws sought to bring under "control the 'unlimited power' of overseers and churchwardens, 'who do frequently, upon frivolous pretences (but chiefly for their own private ends) give relief to what persons and number they think fit" but unfortunately "the Act had no effect" (1990:37).

Relief efforts rose significantly during this period. It is estimated that in 1696, as concluded by a study conducted by the Board of Trade, money raised for the poor through poor relief levies and taxes was around £400,000 per annum in England and Wales. This figure rose to £689,971 in 1748/1750, and £1,529,780 by 1776. Compared to the National Income the figure started off at 0.8% of National Income, rising to 1.0% in 1748/50 and 1.6% in 1776. (Slack 1990:22). Whilst the 1696 data was incomplete and used extrapolations, the subsequent statistics were more complete coming from parliamentary enquiries for all parishes and represented a much fuller picture of the state of poor relief activities in the kingdom (Slack 1990:21-22). Slack (1990:21-22) further demonstrates that 3.6% of the population received relief in 1696, rising to 7.9% in 1748/50 and rising further to 9.8% in the year 1776. These results show that close to 10% of the population were recipient of poor relief by the time of the American Revolution (1775-1783). Even if these figures could have been erroneous, they were at best conservative. Slack opined that "surveys of the numbers receiving relief of any kind in a parish over a fifty-year period in the later eighteenth century

might well reveal proportions of 20% or more” (1990:25). These numbers were significant by any measure and supposedly highly noticeable.

In the eighteenth century, some critics of the Poor Laws argued that the relief created a dependency mentality, negating the incentive to work, although this view is contested (Slack 1990:45).

## **2.6 CONCLUSION**

This chapter has offered a detailed summary of the context in which John Wesley lived and taught in eighteenth century England. This was a context that was marred by controversies and contradictions including internal strives, rebellions and the waging of wars amidst peaceful existence. There were numerous cases of violations of civil rights whilst at the same time human rights were being entrenched and consolidated.

Ideological contestations between the Whigs and the Tories, especially with the Whigs appropriating loyalty to the throne exclusively to themselves, and positioning themselves as defenders of Protestantism in England, had the effect of weakening the church. Any person seen to be distancing themselves from the Church of England and Protestantism in general would attract the ire of authorities and possible massive retribution. That the church and the clergy wielded power in society was unquestionable with pulpits being used to advance particular causes.

The Walpole sponsored enclosures enlarged the gulf between the elites and the poor, and further contributed negatively towards unemployment and inequality. The Jacobite cause suffered irreversible and huge losses subsequent to the revolt of 1745 which also led to huge state repression and execution of rebels as well as those suspected of having taken part in the rebellion. Human rights gains that had hitherto been secured were reversed as the armies of the Duke of Cumberland (Prince William) brutally murdered captured rebels.

One of the most extensive forms of poor relief in Europe, the English Poor Law, was reaching and providing some form of relief to close to 10% of the population of the kingdom by the time of the American Revolution, in 1776. This relief was prone to abuse and corruption and was often abused by parish overseers.

Is it possible that John Wesley was brainwashed by the extensive propaganda that he was exposed to during his early formative years and cemented by those in power, like Walpole who advocated for passive obedience and non-resistance by the subjects? What could have been the effect of expected allegiance to the throne on his ethics? What were John Wesley's contributions to the discourse regarding all these developments?

The next chapter will explore the life and teachings of John Wesley and will seek to answer questions raised in this chapter about his contributions to the discourses on the administration of the English Poor Laws as well as the enclosures and their effect on poverty.

In relation to the discourse on the Poor Laws, the next chapter will seek to answer whether the revered founder of Methodism, a majority of whose following came from the ranks of the poor and, were themselves beneficiaries of the Poor Law Relief, was able to offer insights to these developments?

Finally, the next chapter will also seek to understand to whom were comments that John Wesley offered (if any) addressed, and whether they were challenging the powers that be, or merely admonishing the gentry and lower levels of society?

## **CHAPTER THREE**

### **THE LIFE AND TEACHINGS OF JOHN WESLEY AND HOW METHODISM EVOLVED**

#### **3.1 INTRODUCTION**

Having discussed the historical context in which John Wesley lived in the previous chapter, we now turn our attention to the study of his childhood, adult life, and his teachings. For this, we will primarily employ the work of Albert C Outler (1964)<sup>15</sup>.

To supplement this aspect of the study, we will also draw from the works of Thomas C. Oden, Robert G Tuttle, Richard Heitzenrater, Arthur Attwell, and Leonard D Hulley. These scholars have been chosen for the expertise they have established in the field of study on John Wesley's life, ethics and teachings<sup>16</sup>.

This chapter seeks to highlight the family context and upbringing that influenced Wesley's thought and his ethics, as well as the pertinent aspects of his formative years, when and how his ethical thinking evolved culminating in his economics ethics. The objective is to develop a sound understanding of factors that may have influenced his teachings and theology in his later years.

#### **3.2 THE LIFE OF JOHN WESLEY**

John Benjamin Wesley was born on 17 June 1703 in a small village called Epworth and died on 2 March 1791 at his home in London, aged 87 (Attwell, 1989:31, Tuttle 1978:42). His life spanned almost the whole of the eighteenth century. He was born the fifteenth child of nineteen children in the household of Rev Samuel and Mrs Susanna Wesley (nee Annesley). Only ten of the children in the Wesley household survived infancy (Tuttle 1978:38). John's brother Charles Wesley was the eighteenth child and born in 1707 (Cragg 2011:15). The

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<sup>15</sup> Albert Outler is regarded as one of the more significant Methodist theologians of our time. His protégé, Thomas C. Oden contends "no one offers a better focused picture of Wesley's source and context" (Oden & Longden 1991:8) than Outler. These are rich words coming from someone who is himself a specialist in Wesley studies and retired professor of Theology and Ethics at Drew University.

<sup>16</sup> Dr. Robert G Tuttle is a retired professor of historical theology at the Oral Roberts Graduate School of Theology. As already alluded to in the previous chapter, Professor Richard Heitzenrater is the sitting General Editor of the Bicentennial Edition of the Works of John Wesley. Professor Leonard Hulley is one of South African specialists on the subject of John Wesley's ethics and brings to the study a South African perspective.

Wesley household was a strong Anglican home with the father, Rev Samuel Wesley being a devout Anglican Priest. Notably, the Wesley family had a long line of clergymen, going back to Bartholomew Wesley who studied divinity at Oxford, “the university to which his son, grandson and three great-grandsons were to follow him” (Attwell 1989:3). The three grandsons were of course, John himself, his elder brother Samuel and younger brother Charles Wesley. Bartholomew’s grandson was Rev. Samuel Wesley, John Wesley’s father. Bartholomew’s son was John Wesley’s grandfather, John Wesley or Westley, as he was known then. All these men were priests (Attwell 1989:3).

John Wesley’s maternal grandfather, Dr. Samuel Annesley, was also a priest. A common thread that runs through both sides of the Wesley family was the nonconformist stand the family assumed against the 1622 Act of Uniformity. Attwell refers to Dr. Annesley, Susanna’s father, as “the St. Paul of Non-Conformists” (1989:4). In typical Protestant Nonconformist Puritan tradition, to which the Wesley’s and Annesley’s (John’s grandparents) subscribed, special emphasis was placed on conscience as an arbiter of a person’s actions and moral choices, as well as on the virtue of independence.

Susanna was the youngest child in the Annesley household, a household in which worship of God had been centralised, a household that provided in her own words, “the foundations of solid piety... in sound principles and virtuous disposition” (Thomas 2003:1). Both Samuel and Susanna deviated, albeit independently of each other, from their respective families’ nonconformist stands and adopted positions that agreed with those of the Church of England (Tuttle 1978:37). Interestingly, from an early age, Susanna was exposed to Puritan thinking as her family was frequented by notable Puritans (Thomas 2003:1). However, as a strong willed and independent thinker, Susanna chose the Church of England over Puritans, even though her own father was a staunch Puritan (as alluded to earlier) and a Presbyterian priest. She made this choice of being a member of the Church of England at the tender age of thirteen, engaging her father, who finally allowed her to exercise this choice (Attwell 1989:4-5).

Samuel and Susanna got married on 12 November 1688, the year of the Glorious Revolution, in London (Tuttle 1978:37). This was three months after Samuel Wesley’s ordination (Tuttle 1978:37). A few years after their marriage, Rev Samuel Wesley was appointed rector at Epworth. He and Susanna set up home there, where they would remain for 39 years until

Samuel's death on 5 April 1735 (Hulley 2006:116). As a mother, Susanna was also a meticulous person, a trait that she instilled in her son John, and one that would be essential in the building of Methodism.

John Wesley's father, Samuel, was a political activist and this eventually placed his ministry in some jeopardy (Tuttle 1978:38). Samuel was disliked more by people of Epworth for befriending the tax collector (Tuttle 1978:39). Epworth villagers were generally not welcoming of strangers and did not much welcome the Wesley's when Rev Samuel Wesley assumed duty there in 1697 (Tuttle 1978:39). Tuttle makes the observation that life was difficult in Epworth for the Wesley's but:

in spite of the hardships and even imprisonment [of Rev Samuel Wesley senior, he] remained undaunted. To be sure, there were times when he would have cherished the idea (to use his own words) "of becoming a missionary in India, China, or Abyssinia," but Epworth was to be his calling (Tuttle 1978:40).

Ironically, "for most of the villagers [at Epworth], religion was little more than a bad joke" (Tuttle 1978:40).

Referring to circumstances in Epworth around Rev Samuel Wesley, Tuttle asserts, "you can imagine the difficult time anticipated by a parish priest who not only called his irreligious parishioners to genuine piety but was liturgically high church and politically loyal to a system that had apparently been robbing them blind" (1978:40-41). In the end, Samuel Wesley was also hated for the way in which he earned a living.

One of the crucible moments in the life of the family happened on the evening of 9 Feb 1709, when their house caught fire and John Wesley, who had been sleeping upstairs, was left alone and trapped inside the house. Eventually, he was miraculously rescued from the fire when men created a human ladder and his father reached out for him just before the roof gave in. Susanna believed that John's miraculous saving had divine meaning and referred to him as "a brand plucked from the fire" believing that God had a special reason for saving John's life (Attwell 1989:8). John also discerned as his mother did and internalized this interpretation and grew up embracing this view (Attwell 1989:8; Outler 1964:6).

The fire damaged the house extensively and the family routine was disturbed. In this time of distress, "the family was dispersed amongst neighbours and friends" (Attwell 1989:8).

Unfortunately, this new arrangement led most of the children in the household to experience a deterioration in their manners. As soon as the house was rebuilt, Susanna began in earnest to correct the deviant behaviours and instilled the necessary discipline in her children. The caring mother that she was, she took charge of her children's elementary schooling, and started teaching them formally as soon as they turned five (Attwell 1989:8). Their first reading book was the Bible (Attwell 1989:8). She set apart time every evening for private conversation with each child. John, who was also known as 'Jack' in the family, had his time on Thursdays (Attwell 1989:8-9).

Susanna played a prominent role, and perhaps even a dominant one, in the upbringing of her children, raising them with discipline. She would write to John years later about rearing children and stated, "in order to form the minds of children, the first thing to be done is to conquer their will, and bring them to obedient temper" (Attwell 1989:7).

As a mother she also personally attended to the children's elementary schooling. The children's formal education started as soon as they turned five and they did their respective schoolwork six hours each day (Hulley 2006:5-6). During that time, formal education was almost an exclusive preserve of the elites, but the Wesley children were fortunate to have a mother who could perform this important role of teaching them (Hulley 2006:5-6).

The Wesley boys would subsequently be enrolled at public schools (equivalents of private schools in contemporary South Africa) from where they would further their studies at Oxford (Hulley 2006:6). Hulley notes that:

the eldest son Samuel was sent to Westminster school, to be followed some years later by Charles. Samuel was by then teaching at the school. John was sent to Charterhouse, then located in London, when he was eleven years old, proving to be an apt scholar (Hulley 2006:7).

From Charterhouse, John enrolled at Oxford University as a seventeen-year-old and graduated with a Bachelor of Arts degree in 1724, after which he furthered his studies and obtained a Masters degree in 1727. Whilst a student at Oxford, he offered for the priesthood (a decision that was enthusiastically supported by both his parents) and was ordained a deacon in 1725 by Bishop John Potter (Hulley 2006:8). In March 1726 he was appointed a fellow of Lincoln College, where he would be ordained priest on the 22<sup>nd</sup> of September 1729

by the same Bishop Potter. This fellowship “provided financial security” that Wesley so dearly needed (Hulley 2006:8). For two years from 1727 he was his father’s assistant at Epworth and upon his return in 1729 to Oxford, he joined the Holy Club, a fellowship group of four young Christians, that had been formed by his brother Charles and a few friends. Charles Wesley and three of his friends had agreed to meet about three evenings in a week to read scripture, pray and meditate on the word (Hulley 2006:8-9). Word went out among Oxford students about this practice and these friends were ridiculed and given names like Bible Moths, the Holy Club, and Methodists. The term Methodist was used to describe the manner in which these friends methodically went about their business of scripture reading, prayer and meditation. Whilst these words were meant as ridicule, in time they turned to be names of acclamation (Hulley 2006:9). Soon after joining the Holy Club, John Wesley assumed its leadership, and the club became a base from where they started the prison ministry. Hulley notes that “like their father before them, and to his gratification, John and Charles started to visit prisoners at the Castle at Oxford” (2006:9).

His father was keen that John should succeed him as rector at Epworth, but John declined the offer, believing that he was best positioned at Oxford to serve God (Tabraham 2010:22). His elder brother Samuel, tried to persuade John otherwise (in support of their father’s plea) but to no avail (Hulley 2006:10).

Samuel Wesley senior died on 5 April 1735<sup>17</sup> at Epworth and later that year, on the 14<sup>th</sup> of October, John and Charles embarked a ship to Georgia<sup>18</sup>, less than a year after finally declining to serve as rector at Epworth, insisting that he discerned his calling to be at Oxford (Outler 1964:10). Graciously, their recently widowed mother gave her blessings to their mission to Georgia. However, the ship only sailed on 10 December 1735 (Attwell 1989:23). John was to be chaplain both on board as well as to the natives and colonists in Georgia, whilst Charles was to serve as Colonel Oglethorpe’s secretary (Tabraham 2010:23; Outler 1964:11; Attwell 1989:22). On board the ship, Wesley befriended German speaking Moravians and from them he learnt German. He also met August Gottlieb Spangenberg, a Moravian, and developed a deep respect for him. Spangenberg became Wesley’s friend and

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<sup>17</sup> Hulley 2006:116

<sup>18</sup> Georgia was the last of the English colonies in North America founded in 1732 by a former army officer James Oglethorpe and named after King George II. This colony was primarily founded for the resettlement of debt-ridden and poor people from England as well as to provide a military buffer for the colony of South Carolina against enemies such as Spanish and French armies.



counsellor (Outler 1964:43). During storm encounters on the rough seas, Wesley and the Englishmen on board became scared and afraid to die, but their Moravian counterparts remained calm and continued to prayerfully sing their hymns (Outler 1964:43). This state of affairs convicted Wesley and he started to doubt his faith. He would write in his journal that he went to America to save others when he was himself not even saved (Outler 1964:44).

The Georgian mission was a fiasco as Charles proved to be an ineffective secretary and John ended up a wanted fugitive (Outler 1964:11). Whilst in Georgia, he kept the company of Sophia Hopkey, a young woman with whom he had fallen in love, but who eventually married a rival suitor, William Williamson (Attwell 1989:30-32). Perhaps out of spite, John denied Sophia communion, triggering a host of unanticipated reaction including Mr. Williamson suing John of defaming Sophia's character. The ensuing legal battle forced John to flee Georgia in December 1737 a disappointed and depressed man (Cragg 2011:16; Attwell 1989:55; Outler 1964:13). Charles had already returned to England earlier that month and was battling ill health (Attwell 1989:30-32). Attwell surmises that:

Wesley's experiences in Georgia aggravated his doubts and fears. He began to question the very foundations of his faith. His ideal was still Christian perfection, but the method of attaining that ideal – perfect obedience to the will of God, construed as an act of will on the part of man – had proved a dismal failure. It was in this mood of near despair that Wesley returned to England (Attwell 1989:55).

On arrival from Georgia, he met and made friends with Peter Böhler, a Moravian leader, and shared his frustrations with him. Importantly, he took stock of his own level of faith and concluded that his faith was weak and that he should stop preaching faith, to which Böhler advised him “preach faith till you have it, and then because you have it you will preach faith” (Hulley 2006:15).

An interesting feature of John Wesley's life was his relationship with women. Hulley surmises that “Wesley's relationship with women reflects a strange ambivalence” (2006:41). Whilst there is no doubt that he enjoyed “a very close relationship with his mother”, and that during his younger years, especially at Oxford, he had quite a few women friends whose company he enjoyed (and vice versa), he seemed unprepared and/or hesitant when relationships seemed to develop further, as evinced by the Sophia Hopkey saga (Hulley 2006:41).

There is a further example regarding his relationship with Grace Murray, a young widow of Alexander Murray, who had been a master mariner. Grace had become a Methodist and started working in the Methodist Orphan House. She had nursed Wesley when he had taken ill. Following that nursing episode John Wesley started courting Grace Murray, even though that the courtship was a strange one as they spent a lot of their time together in prayer and/or discussing the work of the Methodist movement. Accordingly, “he came close to proposing, but hesitated” (Hulley 2006:42). Charles was opposed to this relationship on the basis that marriage would tie John down and affect the work of evangelising. He himself had stopped travelling extensively as a result of his marriage and feared that John would fall into the same trap (Hulley 2006:42). To counter the relationship and possibility of marriage, Charles matched Grace with John Bennet, one of the preachers in the movement (who was also a lawyer by profession), and eventually presided over their marriage effectively preventing his brother from taking his relationship with Grace to a higher level or marrying her. Mr and Mrs John Bennet felt the consequent cold attitude of John Wesley towards them and in later years withdrew from the Methodists, even though Bennet was one of the better preachers (Hulley 2006:42).

To further make the point, around 17 February 1751, then aged forty-eight, John Wesley married Mrs Molly Vazeille, a widow from London and at whose home he had spent time recuperating, after he had “twisted his ankle on an ice-covered London Bridge” a week earlier (Hulley 2006:42). However, Hulley (2006:42) notes that Wesley did not mention this marriage in his journals. On marrying Mrs. Vazeille he consulted no one, contravening one of his own ‘Rules of the Helper’<sup>19</sup>. He did not consult nor trusted his brother Charles, as he was hurt by his earlier ‘interference’ regarding Grace Murray (Hulley 2006:42-43). Sadly, John Wesley failed to settle down but instead continued his itinerancy to the detriment of his marriage. Mrs Wesley started off supporting her husband and travelling with him, but this seems to have been too much for her. She also became jealous of the attention her husband was receiving especially from women. This also added serious strain in their marriage (Hulley 2006:42). As a result, she left John several times and finally did so on 23 February 1771, after a solid twenty years of marriage. They were still separated when Molly died years later, on 8 October 1781, prompting John to write in his journal:

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<sup>19</sup> One rule from the Rules of the Helper stipulated that preachers and helpers should not engage in marriage without consulting their fellow helpers and preachers

“Friday 12. I came to London, and was informed that my wife died on Monday. This evening she was buried, though I was not informed of it till a day or two later” (Hulley 2006:43).

Except with his mother, it appears as if John Wesley was unfortunately not able to build strong relationships with women in his life and hesitantly committed to relationships, not even with the wife he married. Having dispensed with his upbringing, the study now moves to investigate his teachings.

### **3.3 THE TEACHINGS OF JOHN WESLEY**

John Wesley’s interest in economic ethics had little to do with economic theories and more to do with how people acquire and spend financial resources, as well as in nurturing intentional good stewardship practices (Oden 2014:59). It is worth noting that according to Jennings, “when Wesley speaks of stewardship, ... he is talking about the redistribution of wealth from the prosperous to the poor” (1992:23). For Wesley, what was paramount was “the right ordering of economic life” by people under his care (Oden 2014:59). Indeed, his followers were mainly people of low stations in society, grappling with issues of daily survival amid unemployment, poverty, and inequality. Most of them were poor, and yet receptive of Wesley’s teachings (Oden 2014:59). Oden condenses Wesley’s concern in this regard as giving “guidance on down-to-earth economic responsibility, as revealed in reason, conscience, and Scripture” (2014:59). Outler asserts that Wesley regarded himself chiefly, and indeed was regarded as such by his followers, “as the chief theological tutor of the Methodist people” (1964:vii).

This section is thus not about economic theories, but rather about the development of life transforming habits for economic realities. The study introduces three tenets of biblical faith that run pervasively in all Wesley’s teachings throughout the seven decades of his ministry, and these are the doctrine of *Imago Dei*, (or humanity’s createdness in the image of God), the love of God and neighbour, and social holiness. Regarding the doctrine of the *Imago Dei*, a young John Wesley preached a sermon titled, “The Image of God” in 1730 (Outler 1987:292-303). Through the sermon Wesley outlined his understanding of what humanity’s original image was – similar to that of God. Wesley understood that this was hardly about human beings’ physical attributes, but rather about character, gifts, talents, and all those abilities

received from God. In the area of understanding, Wesley believed, human beings were like their Creator, possessing the power to distinguish right from wrong, and could act in all manner with perfection. Wesley considered that human beings had the resemblance of God, with just understanding, and were not prone to error. It is Wesley's contention, that in the likeness of God, humanity was perfect. A recognition of the Image of God in others implies a recognition of the qualities of perfection that God manifests in all humans.

Unfortunately, this state of perfection was spoiled by the fall, a concept also known as the original sin. In recognition of the existence of the original sin, Wesley preached from the text Genesis 6:5, "the Lord saw how great the wickedness of the human race had become on the earth, and that every inclination of the thoughts of the human heart was only evil all the time" (NIV). In Wesleyan tradition this sermon has been referenced as sermon no. 38. The sermon is an adapted version John Taylor's earlier treatise, *The Doctrine of Original Sin: According to Scripture, Reason, and Experience*. The teachings in the sermon acknowledge that humanity has fallen and needs to be reconciled to God. In the sermon, Wesley argued that there is nothing that humanity can do on its own to be reconciled with God, even as humanity needed this reconciliation so much. To remedy the situation, God in His grace (prevenient grace) works out humanity's salvation. However, humanity can only respond to this grace through the process of Christian Perfection or Holiness. In this way, the sermon on Christian Perfection seeks to chart out a way towards this reconciled state, a state of 'at one with God'.

Just as in most aspects of his life, his economic ethics were influenced largely by his theology of salvation, which metamorphosed at least thrice in his lifetime (Maddox 1998:20). The first phase covers the period from his childhood, through to his "Oxford salvation" in 1725, ending with his evangelical salvation in 1738 (Attwell 1989:55). Interestingly, Attwell (1989:55) contends that the 'Oxford conversion' was more of a resolution than a conversion.

In this first phase, that is, prior to 1738, Wesley's outlook was influenced by conformist beliefs which were central to his upbringing as well as the readings he did in his early years. He was raised to be obedient to God alone and he established a routine commitment to holiness and moral purity. At home Wesley "was strictly educated and carefully taught that [he] could only be saved by universal obedience, by keeping all the commandments of God" (Attwell 1989:54). Importantly, he was also influenced by his reading of Jeremy Taylor's books *Rules and Exercises Holy Living* and *Rules and Exercises Holy Dying* in 1725,

Kempis's *Christian Pattern* in 1726 and William Law's *A Practical Treatise upon Christian Perfection* and *Serious Call* in around 1728 (Outler 1964:7; Attwell 1989:14; Hulley 2006:5). After reading Jeremy Taylor's offering, he opined in his journal:

I was exceedingly affected, by that part in particular, which related to "purity of intention." Instantly I resolved to dedicate *all my life* to God, all my thoughts and words and actions, being thoroughly convinced there was no medium, but that *every* part of my life (not *some* only) must either be a sacrifice to God, or to myself; that is, in effect to the devil (Outler 1964:7).

These readings, especially the one by William Law, reminded him of and solidified what he had been taught at home. Thus, Wesley experienced his 'salvation' at Oxford in 1725, which is also variously referred to as the Oxford salvation or conversion. It was also from the influence of Bishop Jeremy Taylor (beginning with his conversion in 1725) that John Wesley started keeping records of his daily activities in a personal journal and keeping a more exact account of how and where he used his time (Outler 1964:37).

Early in his life, Wesley had become convinced that a person can occasion his/her salvation by his/her outward and inward works (Attwell 1989; Works XI). Writing to his father from Oxford, he makes an attempt at defining holiness as "a renewal of the soul in the image of God. A complete habit of lowliness, meekness, purity, faith, hope, and the love of God and man" (Hulley 2006:11). The attributes in the letter defined what he believed in and were the basis of his theology. He believed that it was through works that he could be saved. Grassow 1998:187) refers to this phase as John Wesley's *thesis*.

The second phase runs from the period between 1738 to 1765 (Maddox 1998:20). Wesley had been struggling with assurance of faith as evidence by his discourse with Böhler and Böhler's advice to him to "preach faith till you have it, and then because you have it you will preach faith" (Hulley 2006:15). Significantly, on 24 May 1738, Wesley had his 'evangelical conversion' at Aldersgate and obtained the elusive assurance he had been yearning for. He would subsequently write in his journal:

In the evening, I went very unwillingly to a society<sup>20</sup> in Aldersgate Street, where one was reading Luther's Preface to the Epistle to the Romans. About a quarter before nine, while he was describing the change which God works in the heart through faith in Christ, I felt my heart strangely warmed. I felt I did trust in Christ, Christ alone for salvation; and an assurance was given me that he had taken away *my* sins, even *mine*, and saved *me* from the law of sin and death (Outler 1964:66).

Instantly, Wesley experienced his second salvation. Unlike his Oxford salvation, this salvation was not based on works, but on faith in Christ. Consequent to this experience, Wesley's theological outlook changed to salvation by grace only and radically opposed any inclination towards works, consistent with Protestant ethos. On 14 May 1738 John had written a letter to William Law, the author of '*A Practical Treatise upon Christian Perfection*', complaining that he now viewed what he had previously been taught by Law as flawed (Attwell 1989:42). Furthermore, the spirit of the letter indicated that Law had ceased being his spiritual mentor, and he had now found a new spiritual mentor in Peter Böhler, who had convinced him that he needed to do away with his works and righteousness and learn to depend on Christ for his salvation (Attwell 1989:42). For Outler (1964), Wesley had radically changed his views that he almost excluded any human agency in the process of salvation. This second phase is regarded as Wesley's *antithesis* (Grassow 1998:187).

Finally, from 1765 till his death (the third phase), a matured John Wesley had a moderated opinion of salvation believing then that salvation was by grace and confirmed by works. Wesley began to understand holiness, not as a cause of salvation, but rather as the fruit of faith (Tuttle 1978:222). Outler refers to this stage as Wesley's theological *synthesis*, a "dynamic interaction between God's will and man's" (1964:14). Accordingly, there existed a fusion of "the classical Protestant *sola fide* and *sola Scriptura*", "with the Moravian stress upon "inner feeling"" (Outler 1964:14).

Evidently, the impact of these phases (*thesis, antithesis and synthesis*) on Wesley's theology and socio-economic stances, is that his teachings shifted (at least once drastically) and sometimes appeared contradictory. However, what was constant and consistent throughout

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<sup>20</sup> A Methodist society refers to a local congregation. The word society is a name "emphasizing the togetherness (fellowship) so characteristic of the Methodist band of Christianity. The Society (really a local Church) usually, but not always, has its own Church buildings" (Attwell 2005:17).

Wesley's life was his insistence "on the inseparable relationship between the love of God and the love for others", which was indeed the backbone of his economic ethics (Madron 1981:106). In *A Plain Account of Christian Perfection* (as he believed and taught it from the year 1725, to the year 1777) was written by John Wesley during the third phase, Wesley sought to explain his stance amidst the controversies that had surrounded his preaching of this doctrine.

Evidently, the sermon on *Christian Perfection* is predicated on the order of salvation, which begins with an assertion of the original sin. It can be surmised that central to Wesley's theology is the doctrine of Christian Perfection (Kingdon 1957; Outler 1964). No comprehensive analysis of John Wesley's economic ethics, indeed any of John Wesley's ethics, can be undertaken properly without due consideration of his doctrine of Christian Perfection (Hulley 2006:76). Madron believed that for Wesley, "the doctrine of perfection was at once profoundly theological and ethical, which led his thinking into the problems of political and social reform" (1981:106). This doctrine is not only the focus of the sermon of Christian Perfection but is explained in detail by Wesley himself in a tract titled *A Plain Account of Christian Perfection*. The understanding of this doctrine is central for anyone who wishes to understand Wesley's theology and ethics. In it, Wesley outlines in what ways he understood Christians to either be perfect or not perfect. Furthermore, in the sermon Wesley speaks of sanctification<sup>21</sup>, a doctrine which is centred on the ethic of love – the love for God and neighbour. For Wesley, the way to express this love is through his proposed economic ethics, ethics that sought to fight socio-economic challenges that faced the England of his time. Interestingly, Christian Perfection was "a theme more amenable to the concerns of the Enlightenment, [and] Wesley made it dependent upon the action of God. He also affirmed that the valued Enlightenment ideal of human freedom was a reality only as a gift from God" (Langford 1998:40).

Field (2015) contends that Wesley had two important theologies for public engagement. The first was the theology of Sanctification and the second was that of Prevenient Grace (Field 2015:6). For Wesley, Sanctification, Christian Perfection or Scriptural Holiness are synonymous and he contends as much in the *Sermon on Christian Perfection* asserting that

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<sup>21</sup> Field (2015:6) defines Sanctification as God's action to restore "the moral image of God" in human beings.

Christian perfection “is only another term for holiness. Thus, every one that is holy, is in the Scripture sense, perfect”<sup>22</sup>. Wesley further used the tract, *the Brief Thoughts on Christian Perfection* to illuminate his definition of holiness when he wrote “by perfection I mean the humble, gentle, patient love of God and our neighbour, ruling our tempers, words and actions”. To solidify his argument, he surmises by including four images that he regards as helpful in order to capture the concept and these are the love of God and mankind, to have the mind of Christ, the manifestation of the fruits of the spirit, and lastly to be renewed in the image of God (Hulley 2006:81-84). Significantly, as part of his Christian Perfection theology, a matured Wesley asserted that “the gospel of Christ knows of no religion, but social; no holiness but social holiness” (*A Plain Account of Christian Perfection*).

Christian Perfection, together with prevenient grace form important components of the process of salvation (Hulley 2006:74-84). Hulley (2006:74) also notes that in Wesley’s mind this process begins with the impartation of prevenient grace, the grace which goes before us, and which assists us to judge issues morally. Plainly put, our consciences form the basis of this *preventing grace*. Inherently, free will or the ability to make choices between evil and good is pervasive in humanity’s existence. The three tenets of faith, being the *Imago Dei*, the love of God and neighbour and holiness are all central in Wesley’s understanding of Christian Perfection, and hence in his economic ethics. Furthermore, John Wesley also lived during the period of the Enlightenment with all its discoveries and assertion of human freedoms.

Fundamentally, citizens of countries were experiencing increasing liberties, including the freedom of speech that had been unleashed by the Reformation which had taken place about two centuries earlier (Field 2015:2). It is in this context that Wesley preached and taught. It is also in this context that Wesley wrote his seminal writing *Thoughts on the Present Scarcity of Provision*, which is discussed at length in the next chapter. In the tract Wesley blames the behaviour of the elites for the adverse plight of the poor.

John Wesley also lived, wrote and preached in the same era as that pioneer of the political economy, Adam Smith (1723-1790), the renowned author of *An Inquiry into the Nature and Causes of The Wealth of Nations* (published in 1776). Adam Smith propagated for wealth accumulation and laissez-faire capitalism. Tyson postulates that Wesley must have discerned the need to respond to Smith’s theory of capitalism, particularly in light of prevailing

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<sup>22</sup> The Sermon on Christian Perfection



conspicuous consumption and unrestrained accumulation of wealth (2014:170). Tyson further argues that this is perhaps the reason why Wesley defined riches in such an austere manner (2014:170). An extensive discussion on the comparison of economic thoughts of John Wesley and Adam Smith, two contemporaries of the eighteenth century, will be undertaken in chapter four.

Wesley created rules for most things. One such rule was the *Rules for the Helper*, which are a set of twelve rules that are still followed in the Methodist Church of Southern Africa (MCSA) (L&D 2016:182-183). One of the rules, the eleventh rule stipulates that Methodists have no business other than to save souls (Collins 1995:82; L&D 2016:182). Collins elaborates that Wesley would pointedly ask during a Methodist conference in the 1740s, “What is the office of a Christian minister? To which he and others would reply ‘To watch over souls, as he that must give an account.’...shortly thereafter Wesley exclaimed... ‘You have nothing to do but to save souls...spend and be spent in this work’” (1995:82). Methodists came to view their responsibility as personal pietism devoid of the social dimension. In reaction to this chosen dimension, James Cone relegates Wesley to irrelevance on the basis that he was distracted from economic, social and political needs of the poor by his warmed heart experience (2015:35-36). However, this study will show in chapter four that, for John Wesley, the refrain that “the gospel of Christ knows of no religion, but social; no holiness but social holiness” was not just an ideal, but he taught and practiced it, negating Cone’s assertion. Wesley also created rules for living for Methodists. For his Stewards, Wesley enacted *The Rules of the Steward* which were premised on the principle of frugality (Attwell 1989:113). A concept that has emerged throughout Wesley’s teachings, as evidenced in the above discourse has been that of the love of God and neighbour. This doctrine was an important teaching for Wesley. It was on 25 July 1741, at St Mary’s, Oxford University that Wesley preached a sermon on the text Acts 26:28, titled “Almost a Christian”<sup>23</sup> that he taught on the love of God and of neighbour. Acts 26:28 (NKJV) reads: Then Agrippa said to Paul, “You almost persuade me to become a Christian”. This sermon is part of Wesley’s *Sermons on Several Occasions*. In the sermon, Wesley contrasts virtues of being an almost Christian and that of being a true Christian. He begins the sermon by explaining what it means to be almost a

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<sup>23</sup> Sermons of Various Occasions – Sermon 2

Christian, and then expounded on what it means to be an altogether Christian. For him, an altogether Christian is a person who loves God, and who loves his neighbour.

### **3.4 HOW METHODISM EVOLVED**

#### **3.4.1 From a Revival Movement to a Church**

The previous section sketched an overview of John Wesley's fundamental beliefs and how these were shaped by the influences and the teachings of his mother. This section seeks to explore how Methodism developed and later metamorphosized into a church distinct from the Church of England. This section will demonstrate that Wesley did not intend the Methodist movement should turn into a church, but that it how it ultimately turned out.

It all started from small beginnings. Together with his new friend Peter Böhler, Wesley established the Fetter Lane Society on 1 May 1738, his first society barely a month before his 'evangelical salvation' (Hulley 2006:14). It was at this society, on 24 May 1738, that Wesley felt 'his heart strangely warmed' (Hulley 2006:20). From humble beginnings at this Fetter Lane Society, Methodism was to be born, as more societies were opened across England.

Wesley was fascinated by the commitment of the Moravians and decided to visit them at their centre at Hernhut, Germany in June of the same year and observed them very closely and noted their practices with keenness. He wanted to observe them at their 'well' (Outler 1964:14). He came back from that journey having learnt a lot. He judged that there were things he could adopt and others that he objected to. To his credit, he did not allow himself to be overwhelmed by their spirituality and kept his wits with him, sufficient to critique them (Hulley 2006:21) For instance, he objected to the manner in which they equated justification with sanctification (Hulley 2006:21). In addition, they discouraged individuals who did not have assurance about their salvation from communion, prayer and worship, and this Wesley also objected to (Hulley 2006:21). Wesley also disapproved of their self-righteousness as well as how they created cult figure out of their leader, Count Ludwig Zinzendorf (Outler 1964:15; Attwell 1989:46). On a positive note, Wesley was impressed by their organisational competencies, especially their classes/band system, which was similar to what he had used in Georgia. Wesley had practiced the class system at Oxford (their regular meetings together with a small group of friends as the Holy Club) and that was now confirmed by being in use

by Moravians (Hulley 2006:25). This acknowledged system – the class system – would form the backbone of Methodist societies (Hulley 2006:25). Significantly, Moravians loved singing hymns, and these became an almost permanent feature of Methodism, a feature copied from Moravian worship (Hulley 2006:21). Also, of significance to note is that Wesley's faith seemed to have been reinvigorated from his visit to the Moravian centre (Hulley 2006:21; Attwell 1989:49).

At about the same time, a fellow Methodist, George Whitefield, was achieving success as an evangelist and had started a mission, preaching to miners, in Bristol but America was where his heart was (he had in the past been successful there too) (Hulley 2006:21; Outler 1964:17). When preachers like Wesley were concerned with saving souls exclusively from the pulpit, Whitefield had started preaching in the open. It is for this reason that Attwell regards Whitefield as “the pioneer of field preaching” emulating Christ who taught by the mountainside and the lake (1989:48). Because Whitefield's heart was set for mission in America, he invited Wesley to take over the Bristol mission, and commended him to preach in the open (Hulley 2006:21; Outler 1964:17). Initially, Wesley was much opposed to the idea of open-air preaching, preferring pulpits. Incidentally, pulpits were becoming progressively unavailable for him, as he was continuously being banned from one parish after the other for his preaching demeanours (Hulley 2006:22; Collins 2003:105; Attwell 1989:48)). He finally agreed to Whitefield's proposal and wrote in his journal that that he “submitted to be more vile, and proclaimed the glad tidings of salvation, speaking from a little eminence” and preached in the open for the first time on Monday, 2 April 1739 (Hulley 2006:22). That afternoon he preached in front of about three thousand people and expounded the verse “The Spirit of the Lord is upon Me, because he hath anointed Me to preach the gospel to the poor” (Attwell 1989:49; Outler 1964:17). Following his stay with the Moravians in Germany, field preaching provided Wesley “with an avenue for expressing the new-found faith that was in him” and launched Wesley into an evangelist (Attwell 1989:49). Whereas Whitefield was a prolific preacher, Wesley added organization to the preaching, permitting classes to form the spine of Methodist societies (Hulley 2006:22). Members were grouped into classes with one of them appointed class leader. Class leaders were responsible to provide pastoral care to members in their classes, receive financial contributions from

members and meet regularly with Assistants<sup>24</sup> and Stewards<sup>25</sup> (Hulley 2006:27). While the pastoral care of members of a class was located in the first instance with a class leader, the Assistant had the ultimate responsibility for the spiritual well-being of the entire society (Hulley 2006:28). On arrival at each society, Wesley would summon leaders and enquire from them about the spiritual state of members in their classes, and thus Leaders' Meetings became instituted as a platform to detect the pulse of the work of God in each society (Hulley 2006:28). It is interesting that initially Wesley was reluctant to use lay preachers (or assistants). It was only at the persuasion of his mother, Susanna, that he relented and embraced their use in his societies (Attwell 1997:3). Attwell (1997:10) contends that lay preachers, mainly itinerant, were instrumental in sustaining the burgeoning Methodist movement.

Progressively, new societies were opened as members, mainly new recruits, were grouped together into classes (Cragg 2011:18). It was also around this time that the Evangelical Revival, led in the main through the Methodist movement, was taking place (Cragg 2011:18). Societies in close proximity were grouped together into circuits and preachers were appointed to exercise oversight over these circuits (Cragg 2011:19). Wesley deliberately used words such as society, circuit and stewards in order to distinguish his movement from the Church, particularly to protect against perceptions that he had started a church separate from the Church of England (Tuttle 1978:25). According to Wesley, Methodism could not be a distinct denomination, as he believed that "he was acting within the discipline of the Church of England" (Cragg 2011:19). Importantly, Wesley contended that "Methodism was raised up by God to spread scriptural holiness throughout the land" and understood it to be a movement that existed within the Church of England (Attwell 2005:23). Certainly, Wesley regarded himself as, and died an Anglican priest and did everything in his power to retain that identity and vehemently protested against the charge that he and his movement were leaving the Church of England (Collins 2003:235).

This fact can be corroborated to by Wesley's insistence to consciously avoid competition with the Church of England preferring to have Sunday communion at 4am, to enable

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<sup>24</sup> Assistants were full time lay preachers appointed to the itinerant ministry. Wesley was the appointing authority and Assistants were initially members of conference per Wesley's invitation (Hulley 2006:29).

<sup>25</sup> Stewards were people to whom was given the administrative responsibilities of a society such as financial affairs (Hulley 2006:28)

worshippers to attend church service in their respective parishes (Tuttle 1978:25; Cragg 2011:19).

As the movement grew, Wesley met with his brother, Charles, four other Anglican priests in the Methodist movement, as well as his Assistants in order to deliberate on work that was being done in societies, on Monday, 25 June 1744 (Hulley 2006:29, 117). These discussions focused on three agenda items, which included What to teach? How to teach? and What to do? These items included a discussion on the regulation of doctrine, discipline and practice” (Hulley 2006:30). For the record, it was from 25 to 29 June 1744 that the first Methodist conference sat (Hulley 2006:117).

According to Heitzenrater (2013:163), these agenda items are indicative of the primary concerns that were on Wesley’s mind as Methodism developed. It is also clear from this agenda that Wesley had discerned a need to discuss similar agenda items in future meetings.

The 1744 conference, and others like it that were to follow, were to constitute the initial conferences of the movement (Cragg 2011:19). In later conferences, as a result of increasing numbers of Assistants, the training of Assistants was to be discussed and acted upon. Evidently, the two aspects in the life of a Christian that Wesley deemed imperative were those of fellowship and discipline. In addition to the two practices of fellowship and discipline, Methodists were expected to exhibit the virtues of modesty and simplicity in their daily lives (Hulley 2006:25).

Towards the end of his life, John Wesley was concerned about the continued existence of the Methodism movement and was acutely aware of “the need to assure some order and continuity in the connection beyond his lifetime” (Heitzenrater 2013:314). With the growth of the movement, some preachers had started questioning his authority and it had also become apparent that on his demise, Methodism would not have a legal standing, especially to resolve issues of polity and property. (Heitzenrater 2013:314).

To mitigate against this eventuality, Thomas Coke<sup>26</sup>, Wesley’s primary lieutenant, sought legal advice from an attorney called John Madocks, who advised that due to its existing

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<sup>26</sup> Thomas Coke was an ordained Anglican priest who had been dismissed from his parish from his curacy in South Petherton and had come to London in 1777. He quickly rose in the ranks of the movement to become Wesley’s right-hand person. His arrival in 1777 coincided with the construction of the chapel in City Road (Heitzenrater 2013:313).

framework, on the demise of Wesley, conference could not legally assume the property or power that Wesley possessed (Heitzenrater 2013:314). Madocks concluded by advising Wesley to constitute a Deeds of Declaration (Heitzenrater 2013:314). This advice was embraced by Wesley and also assented to by the Conference of 1783 (Heitzenrater 2013:315). At the beginning of 1784, Wesley prepared an eight-page Deed of Declaration entitled “The Rev. John Wesley’s Declaration and Appointment of the Conference of the People Called Methodists” and enrolled it with the High Court of Chancery on 28 February 1784 (Heitzenrater 2013:315).

The Deed of Declaration listed a group of one hundred persons who became known as the legal hundred, empowering them to constitute Conference upon Wesley’s death (Heitzenrater 2013:315). The legal hundred together with their successors were empowered forever to annually constitute the Conference of the People called Methodists (Heitzenrater 2013:315). At least ninety-one preachers were excluded from the conference as per the Deed (Heitzenrater 2013:316). This can be attested to by a tract written by a disgruntled preacher named John Hampson, entitled ““An Appeal” to the Wesleys on behalf of “the excluded ninety-one”” (Heitzenrater 2013:316). The quorum of conference was set at forty persons and the first business of each conference was the filling of vacancies that may have occurred since the immediately preceding conference, in order to restore the legal hundred status. Amongst the rights conference had, was to admit those that conference may approve of, as preachers into full connexion or as on trial preachers. Conference was also mandated to station preachers for a maximum of three years at a station (Heitzenrater 2013:315-7; Hulley 2006:30-1). “Although Wesley continued to refer to the Methodist buildings as “preaching houses,” the Deed used the term “chapels”, a subtle indicator of more conscious ecclesiastical self-sufficiency. However, there was no mention whatsoever of relationship to the Church of England” (Heitzenrater 2013:316). Unwittingly, this arrangement was to be a launching pad of what would be the Methodist Church in many of its variations (Heitzenrater 2013:317).

Whilst this step ensured the future of Methodism, the new challenge was that it could be misconstrued as cession from the Church of England (Heitzenrater 2013:316). To alleviate this potential challenge, Wesley sent a message to circuits that whoever preached against the Church of England (privately or publicly) or seen as undermining the Church will be immediately expelled from the movement (Heitzenrater 2013:316).

As could be expected during those times and mainly due to age, the Wesley brothers often fell seriously ill, and sometimes to the point of near death. It is worth remembering that during the 18<sup>th</sup> century, the average lifespan was very short and health care facilities were virtually non-existent (Tabraham 2010:7). The Wesley brothers were way beyond that average lifespan and very fragile, health wise. Sometime in 1753, John feared that his time had arrived, and he prematurely composed an epitaph to be written on his tombstone “Here lieth the body of John Wesley, a brand plucked out of the burning: who died of a consumption in the fifty-first year of his age”<sup>27</sup>. However, he survived this ordeal to live until he was eighty-seven.

John Wesley is believed to have ridden an average of 4,000 miles per annum on horseback and preached in excess of 40,000 sermons during the more than fifty years that his ministry spanned. By the time of Wesley’s death, the Methodist movement had grown to about 72,000 members spread in 115 circuits and serviced by 294 preachers<sup>28</sup>.

John Wesley preached his last sermon a week before his death and recorded his last personal diary entry on that day, 24 February 1791. He had stopped making entries into his journal on 24 October 1790 (Hulley 2006:56). The last letter that Wesley is recorded to have written was also written on 24 February 1791 and addressed to William Wilberforce in which he encouraged him in his fight against slavery and he wrote, “unless God has raised you up for this very thing, you will be worn out by the opposition of men and devils. But if God be for you, who can be against you?” (Outler 1964: 86). Wilberforce was a member of parliament who had been converted by Wesley’s ministry.

In the end, John Wesley vocalized the conviction that sustained him throughout his life with his last words to those around him on his death bed when he proclaimed, “the best of all is, God is with us” (Hulley 2006:56). That John Wesley died an Anglican priest is not in dispute. However, the growth of Methodism forced him to ordain two preachers to support the movement in America and also appointed his trusted lieutenant, Thomas Cook to become the leader of the Methodist movement on his demise<sup>29</sup>. After his death, the Methodist movement

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<sup>27</sup> Outler 1964:6 footnote no. 13,

<sup>28</sup> John Wesley: Christian History, obtainable online <https://www.christianitytoday.com/history/people/denominationalfounders/john-wesley.html> [Accessed on 20 March 2021]

<sup>29</sup> *ibid*

transformed into a church, separating itself from the Church of England, something that both John and Charles had vigorously resisted, a fact that has already been mentioned in this chapter. Notably, the Methodist Episcopal Church in North America had however been founded in 1784, a few years before John Wesley's death (Heitzenrater 2013:345). To illustrate their disengagement from the Church of England, the 1792 American Conference approved a new order of worship disregarding the *Sunday Service* order that Wesley had earlier dispatched to them (Heitzenrater 2013:345).

About the development of Methodism, Heitzenrater opines:

the history of early Methodism is best understood in terms of the emergence and interrelatedness of theological, organizational, and missional developments – each aspect is shaped over a period of many years, and none of these elements is fully understood without seeing its dependence upon the other two (Heitzenrater 2013:xiii).

In September of 1795, the Missionary Society was formed and in 1818 become known as the London Missionary Society (LMS). LMS would later play an important role in sending missionaries to other parts of the world. Significantly, the LMS was a nondenominational formation which was dedicated to helping spread the gospel to countries outside Europe<sup>30</sup>

Earlier in section 3.2, we mentioned that, in around 1725, a group of four friends, led by Charles Wesley, started meeting about three evenings in a week, to study the bible, pray and meditate on the word of God. In their rebuke, they were called Methodists, among other derogatory names. Little did these friends anticipate that their experimental evangelism would result in a movement that would sweep Europe, North America and Africa, and even more so become a church. Primarily, the spread of Methodism happened because of movement of people. Methodists started setting up places for bible study and worship wherever they went and/or settled. Marquardt opines that “the two centuries ensuing the decease of John Wesley saw spread, splits, and reunion of the Methodist movement, its development from a tiny group of devoted believers into a family of Christian churches all over the inhabited world” (2009:85).

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<sup>30</sup> Information on the London Missionary Society retrieved from the Encyclopaedia Britannica <https://www.britannica.com/topic/London-Missionary-Society> on 20 March 2022



Having established how the Methodist Movement transformed into a church and spread to other parts of the world, we now turn our focus to exploring the history of Christianity in South Africa.

### **3.4.2 A Brief History of Christianity in South Africa**

During the early part of the 18th century, the Dutch Reformed Church (hereinafter also referred to as “DRC”) occupied an “exclusive religious prerogative at the Cape” (Hofmeyr and Pillay 1994:41). Below is a summarised chronological analysis of some of the significant developments of religion in South Africa.

Politically, Britain occupied the Cape for the first time in 1795 with little intention of holding on to the colony (Hofmeyr 1991:248). Britain’s interest was to prevent France from annexing the colony and sought to use the Cape Colony as a base against France in the French Revolutionary Wars<sup>31</sup> (Hofmeyr 1991:248). In 1799 the LMS sent four missionaries, which were the first ever from the LMS, to the Cape<sup>32</sup>. Up to this stage, the DRC had maintained religious dominance, but this had begun to be affected by the skirmishes started by British forces against the Dutch in the Colony in 1795<sup>33</sup>. Naturally, these hostilities between France and Britain in Europe had created tensions in the Cape. It was on the signing of the Peace of Amiens in 1803, that a provision was made to return the Cape Colony to the Dutch. After the signing of the Peace of Amiens, the Dutch Commissioner-general, JA de Mist, introduced the Church Ordinance of 1804 (Van Der Merwe 2014:118). The 1804 Ordinances legislated religious tolerance in the colony as well as the right to religious association. Before 1804, lack of religious freedom was a prevalent feature of society (Van Der Merwe 2014:114). The 1804 Ordinances took their cue from developments that had already taken place in the Netherlands. In response to these initiatives, the Roman Catholic Church, which hitherto had been struggling to make inroads in the colony, seized the opportunity and established a

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<sup>31</sup> The French Revolutionary Wars were a series of hostilities in France started by the French Revolution and pitted France against other European countries such as Austria, Prussia and Britain, obtainable online <https://www.history.com/topics/france/french-revolution> [Accessed on 31 October 2021].

<sup>32</sup> Information on the London Missionary Society retrieved from the Encyclopaedia Britannica [www.britannica.com](http://www.britannica.com) on 20 March 2022

<sup>33</sup> The French Revolutionary Wars were a series of hostilities in France started by the French Revolution and pitted France against other European countries such as Austria, Prussia and Britain, obtainable online <https://www.history.com/topics/france/french-revolution> [Accessed on 31 October 2021].

presence in the Cape<sup>34</sup>. Similarly, the Cape Malay community took advantage of the spirit of religious tolerance and pursued Islamic worship<sup>35</sup>.

In accordance with the Ordinance of 1804, the administration of the colony could provide financial assistance to churches and religious bodies, but at a cost of the independence of such formations. For example, all meetings of the church had to be attended to by a government official, that is, a Political Commissioner designate, whose function was to ensure that no political discussions took place at these meetings. However, even with the introduction of the Ordinance of 1804, the DRC remained a big factor in the Christian church of the colony (Van Der Merwe 2014:).

Three years after the Peace of Amiens, hostilities between France and Britain escalated (in 1806). These hostilities had the effect that, in January of 1807, Britain captured the colony for the second time. Sadly, the British once more never seemed interested to hold on to the colony for long and had no desire to effect any significant administrative changes.

The Ordinance of 1804 would later be repealed by a new legislation of 1843, paving the way for government to cease funding churches whilst bringing in volunteerism in the colony (Drus 1939:23-24). The bill that ultimately made this policy official in the colony was enacted in 1875 under the leadership of Saul Solomon, a politician in the Cape Administration who was an advocate of religious and racial equality. Solomon had tirelessly fought for the cessation of religious funding in the Cape Colony, arguing that religious communities should be left to their own efforts and resources as there exists sufficient vitality within these communities to help sustain themselves (Drus 1939:24). Interestingly, the aforementioned bill was tabled every year in the Legislative Assembly by the same Saul Solomon for 21 years (from 1854) until it was finally adopted in 1875, albeit as a revised version of the original bill, but with the same focus (Drus 1939:23). Consequently, the process of terminating financial support for ministers and churches of various denominations would henceforth be implemented gradually (Drus 1939:23-24).

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<sup>34</sup> History of Muslims in South Africa: 1804 - 1899 by Ebrahim Mahomed Mahida, obtainable from South African History Online, <https://www.sahistory.org.za/archive/history-muslims-south-africa-1804-1899-ebrahim-mahomed-mahida> [Accessed on 31 October 2021]

<sup>35</sup> *ibid*

The British soldiers that were stationed in the Cape Colony and were Methodists, were the original seed of Methodism in the Cape as they met in classes and worshipped together. Upon arrival at the Cape in 1795, five of these soldiers began meeting in a room for two hours a week to pray, thus initiating class meetings (Kumalo 2009:37). We will see in the next section that the earliest recorded gathering was in 1804 as these soldiers met in classes (Cragg 2011:22).

### **3.4.3 How Methodism evolved in South Africa**

As we prepare to explore the evolution of Methodism in South Africa, this study seeks to limit its scope to the denomination known as the Methodist Church of South Africa (MCSA). This is done in recognition of the many variations of Methodism and Wesleyan traditions that are present in South Africa, with the MCSA being the largest group both in Southern Africa and South Africa (Bentley 2014:4).

As the revival, referred to in section 3.4.1, led by the Methodist movement was sweeping the world, it also reached the shores of South Africa. It was the loyalty of the laity to Methodism that played a crucial role in the establishment of Methodism in South Africa (Cragg 2011:21; Hofmeyr 1991:253).

Donald Cragg opines:

The first reference to Methodism at the Cape is found in an issue of *The Christian Magazine or Evangelical Repository* in 1802. A letter from an unnamed missionary refers to a certain John Irwin of the Royal Artillery who was converted in a group of “four or five men of other regiments who met together and were called Methodists” (Cragg 2011:22).

Unfortunately, this maiden and yet brief Methodist presence ended in 1803 (Cragg 2011:22). Documentary evidence suggests that this Methodist presence was re-established during the second British occupation (which took place in 1807) (Cragg 2011:22). A member of the British 72nd Regiment by the name of George Middlemiss, wrote a letter dated 16 September 1807, in which he “told a friend in England that a group of Methodists and Presbyterians had formed a society in 1806 and built a small sanctuary at a distance from the town” (Cragg 2011:22). Sadly, this society also soon disintegrated.

Methodism was again introduced to South Africa by a group of ten British soldiers stationed at the colony, and who appealed to Sergeant John Kendrick of the 21st Yorkshire Light Dragoons, to help re-establish the society. Kendrick himself would later come to the colony already as a class leader and a local preacher (Cragg 2011:22-23).

The re-established society grew and by April 1812 numbered about 170 members. Mindful of the huge pastoral responsibility, Sergeant Kendrick wrote to Dr. Coke in England on 30 December 1812 requesting that a missionary be sent to the Cape Colony (Cragg 2011:23).

Conference acceded to the demand and Rev. John McKenny was dispatched and arrived at the colony in 1814, becoming the first Methodist missionary to the Cape. Unfortunately, the Governor of the Cape, Lord Charles Somerset, refused him permission to preach<sup>36</sup> and thus Rev. McKenny sailed on to Ceylon, leaving the colony without a Methodist missionary (Cragg 2011:23). Two years later, Conference dispatched Rev Barnabas Shaw to the Cape. On arrival, he sought the permission of Lord Somerset, but when he too was refused, he defied the Governor and began preaching without permission<sup>37</sup> (Cragg 2011:24).

After a period of about four months of ministering to soldiers in Cape Town and surroundings, Rev. Shaw left for Kamiesberg, which is almost five hundred kilometres northward, where he settled among the Namaqua people at a place called Leliefontein (also called Lily Fountain) Cragg (2011:24). Shaw regarded his settling at Leliefontein as a case of “Peculiar Providence”. This is how this providence unfolded. Shortly after crossing the Orange River, on his journey to the north, Shaw and his party met a Namaqua chief and his entourage who were on their way to the Cape to make a request for a missionary. It turned out that Shaw was the kind of person the chief was looking for. Judging this encounter as a sign of “peculiar Providence”, Shaw joined the chief to Leliefontein where he settled amongst the locals and started ministering to them. He had left for the north not knowing where he was destined for, and by chance met a chief who was looking for a person of his vocation. Indeed, this must have been “a peculiar Providence” (Cragg 2011:25).

Lily Fountain was perfectly positioned to provide a launch pad for further advances into Namaqualand, or modern-day Namibia, and “the mission became a staging post on the way to

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<sup>36</sup> History of the MCSA obtainable online from <https://methodist.org.za/who-we-are/history/> [Accessed on 31 October 2021].

<sup>37</sup> *ibid*

the interior” (Cragg 2011:25). One of the earliest converts of Rev. Shaw was Jacob Links. Links was received into full connexion in 1822 and became the first black and indigenous minister of the Methodist Church of Southern Africa (Cragg 2011:27, 33). Rev. Links had a passion for evangelizing and was keen to take the gospel to the Great Namaqualand, a place he had engaged in mission work in at least three occasions in his lifetime. In his final and tragic foray into the Greater Namaqualand, Rev. Links together with his friend, the Evangelist Johannes Jager, were accompanied by a young minister Rev. William Threfall. The trio were ambushed and killed, with the mission ending in tragedy. Rev Links and his entourage would become the first martyrs of the Methodist mission in South Africa<sup>38</sup> (Cragg 2011:29-30). Their blood watered the very roots of Methodism in Southern Africa.

This tragedy did not stop efforts to evangelize Greater Namaqualand. Eventually, mission stations were established at Warmbaths, in Windhoek and Gobabis in the far north. Due to financial difficulties of the Wesleyan Missionary Society, these missions had to be abandoned in the 1860s (Cragg 2011:33). To its credit, mission work closer to Cape Town endured.

To the east of the country, a new wave of Methodism was taking shape. William Shaw (who is unrelated to Barnabas Shaw) arrived in Albany in the Eastern Cape (Cragg 2011:43). The end of the Napoleonic Wars in Europe in 1815 had brought with it rampant unemployment, especially for soldiers. The government of Britain decided to expatriate more than four thousand people, including soldiers. These were divided into parties of one hundred. Each group of a hundred was assigned a chaplain and Rev. William Shaw was assigned as a chaplain to the Sephton Party (Cragg 2011:43). The parties or groups settled in farms in Albany which were cleared of the indigenous people. Specifically, it was in July 1820 that the Shepton Party settled in Salem (Cragg 2011:44). Soon, people were congregating to worship and repent. Shaw had the advantage of having class leaders and preachers who arrived with him from England, and these were drafted to assist him (Cragg 2011:44).

The reality is that in pursuance of settling these English expatriates in the Eastern Cape, Xhosa and Koi people were forcibly removed from the land they had occupied prior to the arrival of these settlers. Many battles ensued between the Xhosas and the settlers. The

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<sup>38</sup> History of the MCSA obtainable online from <https://methodist.org.za/who-we-are/history/> [Accessed on 31 October 2021].

ultimate subjugation of the Xhosa people by the British, and the Xhosa people's eventual alienation from their land took place over a prolonged period of time (Cragg 2011:68).

Despite being a chaplain to the Sephton Party, Shaw viewed the entire settlement as his parish and thus, established a flourishing colonial church. He looked beyond the colonists and in November 1823 he established the Wesleyville mission among the Gqunukhwebe tribe (Cragg 2011:58). By 1834, he had successfully planted an additional six stations between the Umzimvubu and Fish Rivers (Kumalo 2009:39). It was here that he laid a strong foundation of the solid Methodist witness in what would later be the Transkei. Challenges were plenty and some of the mission stations were damaged more than once in consecutive frontier wars. However, the missionaries persisted, and their determination was duly rewarded (Cragg 2011:78-90). The evangelical endeavours of Rev. John Ayliffe, stationed at Butterworth at one stage, contributed immensely to conversions of African people, chief among these was Charles Pamla's parents. Charles Pamla, started off as a class leader, later an interpreter for Rev. Robert Lampough, stationed at Annshaw, and Rev. William Taylor (Balía 1992:78-79). Significantly, Taylor and Pamla, who initially interpreted for Taylor, and later as a minister, became major role players in the 1866 revival that took place at the Annshaw mission station (Balía 1992:81).

In the North-West Province (formerly Transvaal), Rev. Samuel Broadbent, Rev. James Archbell and Rev. Thomas Hogson were instrumental in forming a mission station in Makwassie in 1822 (Kumalo 2009:39-40). In 1841, Archbell visited Natal and started work among the Zulu people (Kumalo 2009:103). Subsequently, Archbell achieved great successes in Natal and accordingly, Kumalo refers to him as "the father of Methodism in Natal" (2009:103).

Over time, the Methodist mission reached many milestones. Amongst the many milestones, was the successful use of interpreters and preachers of African descent from the early stages of missionary work in the Eastern Cape. Charles Pamla, Boyce Mama, Joseph Tele and William Shaw Kama were such interpreters. After the establishment of the theological institute of Healdtown in 1867, Charles Pamla, James & Charles Lwana and Boyce Mama, who were also the first entrants, were ordained in 1871, as the first black ministers of the Wesleyan Church in South Africa (Balía 1992:87). Furthermore, Balía records that "Pamla

himself went on to become the first black superintendent minister, having full authority in his circuit” (1992:87).

It is worth noting that the growth of Methodism was assisted by migration. As people migrated to mining towns for work opportunities, they set up class and prayer meetings and recruited others. Some permanently migrated whereas others were migrant labourers, and when migrant labourers returned home, those that were converted evangelized their families and neighbours. Methodism flourished as result of these movements.

The establishment of the Methodist Church of Southern Africa came about from the 1931 merger of three branches of Methodism. A private Act of Parliament of 1930 facilitated a union between the Wesleyan Methodist of South Africa, the Transvaal and Swaziland District of the Wesleyan Methodist Church of Great Britain, and the Primitive Methodist Missions in the Union of South Africa (Kumalo 2009:40).

### **3.5 CONCLUSION**

This review has sought to show how John Wesley’s teachings and ethics were immensely influenced by his conformist upbringing and his mother’s counsel. Wesley taught and preached on Christian Perfection consistently throughout his long ministry. His emphasis was on the doctrines of original sin, *Imago Dei*, social holiness, the love of God and neighbour, and prevenient grace. He built a strong case beginning with a perfect state in the *Imago Dei*, which was corrupted by the original sin. As humanity strives to return to its original state, humanity’s actions are based on the love of God and of neighbour. Lastly, since humanity desires to be reconciled with God thus restoring its original state, there becomes a need for a process of Christian Perfection which culminates in holiness (Forster 2018:8). It is in these teachings that Wesley’s economic ethics were embedded.

Since the majority of followers of Methodism came from the ranks of the poor, and these laws affected them directly, chapter two had correctly concluded with an enquiry of whether Wesley’s teachings would reveal that he had contributed to the dialogue on the English Poor Laws. In fact, this chapter has confirmed the suspicion in chapter two that Wesley may have been brainwashed by the extensive propaganda that he was exposed to during his early formative years and cemented by those in power, like Walpole who advocated for passive

obedience and non-resistance by the subjects. It is reasonable to conclude that his allegiance to the throne may have compromised his ethics, resulting in his silence on policy matters that he was uncomfortable with.

The chapter has also demonstrated how Methodism evolved from being a movement into becoming a church. Although Wesley was on record to dissuade his Methodist movement from separating from the Church of England, his death brought about that eventuality. The Deed of Declaration and the annual conferencing became the bedrock upon which a church was formed. In particular, the chapter has also demonstrated how movement by people and adherence to the class system helped establish a church whose footprint can be found in a number of continents, including Africa. Significantly, the chapter has sketched out how Methodism evolved in South Africa amid political challenges of the time.

Now that we have established what informed Wesley's thoughts, and how Methodism evolved into a church, we turn in the next chapter, to his economic ethics. We will do so by establishing the principles that underpin these ethics.



## CHAPTER FOUR

### WESLEY'S ECONOMIC ETHICS

#### 4.1 INTRODUCTION

In the previous chapter, the study explored the life and teachings of John Wesley with the aim of highlighting his core beliefs. The chapter also reviewed how Methodism evolved and spread throughout the world, and specifically focused on how Methodism eventually evolved in South Africa. The current chapter will move from his teachings and probe deeper in order to understand his economic ethics. In pursuance of that goal, this chapter will highlight the four major principles that underpin John Wesley's economic ethics. These ethical principles are: the need for Government Intervention in the Economy, Honest and Life-Enhancing Work, Poverty Alleviation, and Equitable Distribution of Wealth. These four principles will be juxtaposed against the views of Adam Smith, who was a contemporary of John Wesley.

The theological bases upon which Wesley's interactions with his listeners rested were primarily the doctrines of creation and redemption. His belief in the doctrines of *Imago Dei*, that all persons are created in the image of God, and that of redemption, that through Christ, all persons are capable of acting for the salvation of others, became foundational (BCEWT 1994:15)<sup>39</sup>.

Wesley also believed that "the Gospel of Christ knows no religion but social, no holiness but social holiness", and was convinced that faith must manifest itself in works and engagements with issues affecting societies in which the faithful live (Attwell 1989:134).

These doctrines are encapsulated in his theology of Christian Perfection and became the basis of his primary motivations for engaging in practical expressions of his faith through his economic ethics.

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<sup>39</sup> Boston Collaborative Encyclopedia of Western Theology, 1994

## 4.2 THE NEED FOR GOVERNMENT INTERVENTION IN THE ECONOMY

Most of Wesley's discourses on social problems were written in the 1770's (Kingdon 1957:344). As was common during those days, he used a combination of letters, public addresses, sermons and pamphlets to advocate for his positions, which were theologically grounded, as he wrote and spoke "to the bulk of mankind" (Outler 1964:88, 119). Through these publications, Wesley assumed a role of a public theologian. For Wesley, the mantra "the gospel of Christ knows of no religion, but social; no holiness but social holiness" was an equivalent of a policy statement (*the Brief Thoughts on Christian Perfection*).

During this time, England had just concluded a seven-year war with France, which had left the fiscus depleted, and the kingdom would later experience a severe crop failure culminating in a depression from 1772 to 1775. As he travelled on his evangelical missions, Wesley experienced first-hand, the effects of the depression on the thousands who were unemployed and saw how those who were still employed were struggling to make ends meet (Kingdon 1957:344). What was disturbing for Wesley was the inevitable rise in the price of food amid the high levels of unemployment. Food riots ensued and quantities of flour, grain and other foods were seized by mobs as social cohesion was compromised (Kingdon 1957:344, Tracy 1992:37). Tracy records that during Wesley's ministry, about 150 hunger riots took place as storehouses were broken into and mobs set prices for grain, which were lower than those influenced by the export market (1992:37). This was primarily because the export of grain had become a lucrative market, leading to a neglect of the local market and increased exporting of most crops, and thus importing price inflation (Tracy 1992:37).

There arose a need to identify the root causes of the scarcity and the resultant riots, as well as to propose solutions thereof, as opinion makers, including Wesley, feared that the riots had the potential to lead to a revolution (Kingdon 1957:344). In responding to this crisis, Wesley wrote the tract *Thoughts on the Present Scarcity of Provision* in 1773, after he had written the suggestions that were contained in the tract in a letter that he had distributed to several newspapers in London towards the end of 1772 (Kingdon 1957:344). Naturally, the tract was an expanded version of the said letter.

In the tract, Wesley sought to use available economic information (at least available to himself) and his personal observations to highlight "empirically verifiable and demonstratable causes of the existing widespread poverty" (Marquardt 1992:32).

In 18<sup>th</sup> century England, the prevalent economic system was the mercantilist system, which was based on the belief that the wealth of a nation is fixed and finite and that the only way to increase such wealth was by exporting goods and services and importing nothing in return. This led to the conclusion that governments must intervene by encouraging investment in the export market in order to increase the overall wealth of a nation.

The writing, *Thoughts on the Present Scarcity of Provision*, is regarded as Wesley's most serious effort at addressing pressing economic issues of his time (Marquardt 1992:44). In the tract, Wesley laments the systemic inadequacies pervasive in the English mercantilist economic system and its focus on the export market, blaming poverty and hunger on scarcity. He locates the source of all scarcity, and subsequent poverty, on greed, crass consumption and the export sector. To remedy this price distortion, Wesley petitioned government to levy "a tax of ten pounds on every horse exported to France .... [and] increase the tax on the gentlemen's carriages "by five pounds yearly upon every horse"" (Kingdon 1957:345). Wesley also blamed the export market for price distortions, especially price increases. In this writing, Wesley recommends that the least the government could do was by intervening by way of taxes on luxury horses and distilling houses (Weber 2001:295).

Wesley also petitioned the government "to reduce the price of wheat and barley, [that] all distilling should be prohibited, starch should be made of rice, and the importation of both rice and bread-corn should be encouraged" (Kingdon 1957:344-5). Wesley further proposed the reduction of prices of numerous foods including prices of meat, oats, grain and barley, as well as the reduction of land prices to make it possible for the general populace to acquire land and produce food (Kingdon 1957:345).

Mercantilists supported full employment, but for reasons different from Wesley's. They sought to bolster production for export purposes whereas Wesley sought full employment so that workers are able to support their families with food, clothing and homes. Wesley's interest was the person, while the interest of mercantilists was the state (Haywood 2009:315).

In critiquing the mercantilist economic system, Wesley advocated for government intervention that encouraged importation of the required goods, that prohibited exports, that penalized, by way of taxation, spending on luxuries, that reduced prices of staple food and meat, and interventions that prohibited or disincentivized and penalized distilling enterprises.

Kingdon viewed some of the suggestions as worthy of being pursued whilst he regarded others as unrealizable and hopelessly naïve (1957:345). He contends that very few economists of the time “would expect a prohibition of all distilling or a tax on horses to bring a nation out of depression” (Kingdon 1957:345).

In his 1776 book, *Nature and Causes of the Wealth of Nations*, Adam Smith postulates for a *laissez-faire* economic system, contending that governments must not have any role to play in the economy as the economy is capable of correcting any distortions and imbalances, through an invisible hand.

In an attempt to counter the teachings of Adam Smith, Wesley became a conservative version of the economist<sup>40</sup>. This provides an example for a basis of a critique of Wesley pertaining to his ambivalence towards petitioning government on economic intervention. On one hand, he calls for government intervention against behaviour that supposedly causes poverty (on *Thoughts on the Present Scarcity of Provision*) whereas on the other hand and in the same writing, his seminal work on the market, he is silent about the most comprehensive, yet poorly implemented, government sponsored program aimed at fighting poverty, the English Poor Laws. To his credit, Smith did engage with the English Poor Laws even though he opposed them for the limits they imposed on free labour movement as the poor were prohibited from working in any parish except the ones in which they belonged (Elliot 2000:436; Gilbert 1997:286).

It is worth noting that after 1775, the economic situation of England had begun to improve significantly, even as the government was not following the extreme advises of Wesley and many other opinion makers of his time (Kingdon 1957:346). The much-feared internal revolt did not materialize, but there was another revolution from external factors that would happen – The American Revolution (Kingdon 1957:346). In this instance, there was a mantra which rallied American colonies: “no taxation without representation” which Wesley vehemently opposed (Kingdon 1957:346). Wesley’s reaction in relation to this situation falls outside the purview of this dissertation, suffice to say that his economic ethic in this instance (against the

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<sup>40</sup> Skousen M, 2015. The Big Three in Economics: Adam Smith, Karl Marx and John Keynes, commends Wesley for his mantra Earn all you can, Save all you can and Give all you can, giving him some space alongside the three economists.

people of the colonies), was inconsistent with his stand towards social issues affecting the people of England (Kingdon 1957:346).

Both Adam Smith and John Wesley were opposed to the mercantilist economic system, but for different reasons. Wesley blames the export market for the scarcity of goods that was prevalent during his time, whereas Adam Smith believes that personal initiative together with self-interest, and not government intervention, are necessary contributors towards increased personal wealth, which should translate into a nation's wealth.

Meeks puts it succinctly as he notes "in the economic "logic" of capitalism, capital and the laws of the market come first. Human beings and the satisfaction of their basic needs and the right to life for all come second" (1992:11). This study agrees with Meeks in that unrestrained capitalism is flawed and furthermore capitalism must be mitigated by government intervention to be of benefit to everyone.

Notwithstanding Wesley's silence on the English Poor Law, this section of the dissertation surmises that government intervention in the economy is necessary, whilst allowing for a responsible and controlled personal initiative.

### **4.3 HONEST AND LIFE-ENHANCING WORK**

As discussed in the last section, John Wesley was saddened by the state of unemployment as well as the reality of employment that did not bring dignity to workers of his time. Amid rampant unemployment, those who were employed were stripped of their dignity and some people even found dishonest ways of fending for themselves and their families, just to survive. To add to this sad situation was mercantilist greed of exploiting workers and the dehumanizing trade in slavery. Wesley thus embarked on a campaign for work that was both honest and life enhancing.

As part of his campaign for work that was both honest and life-enhancing, Wesley wrote two seminal sermons, these being *The Sermon on the Use of Money* and *The Sermon on the Good Steward*. While the *Sermon on the Good Steward* makes some important contribution to the ethical principle of honest and life-enhancing work, it makes an even greater contribution to the ethical principle of equitable distribution to wealth, and as such will be interrogated at length in section 4.5 below, which deals with that ethical principle. It suffices to mention that,

for Wesley, the value of good stewardship is momentous when dealing with financial resources, especially as part of the ethical principle of honest and life-enhancing work and is a subject of both sermons (Marquardt 1992:35).

In the sermon, *On The Use of Money*, Wesley advocates for the concept of frugality and proposes a three-fold approach to economic ethics with the mantra “*earn all that you can; save all that you can; and give all that you can*” (Marquardt 1992:35; Attwell 1989:136; Tyson 2014). Skousen commends Wesley for his mantra *Earn all you can, Save all you can and Give all you can*, ranking him on equal footing with three leading economists of the past three centuries, Adam Smith, Karl Marx and John Maynard Keynes (2015). The first rule, “*earn all that you can*” relates to the ethical principle of honest and life-enhancing work. The remaining two rules will be discussed under the sections 4.4 and 4.5 dealing with ethical principles of poverty alleviation and equitable distribution of wealth respectively.

In the first rule, *earn all that you can*, Methodists are implored to earn all that they possibly can earn, without causing any harm to themselves and others, without causing a loss of one’s or one’s neighbour’s soul, and always in legitimate and honourable manners (Macquiban 2016:420; Marquardt 1992:36; Attwell 1989:136). Wesley expands to show that harm may include bodily, mental, or spiritual harm to oneself or others (Attwell 1989:136). This rule also informed Wesley’s drive against slavery. For him, slavery was a life sapping enterprise, which stripped fellow human beings of their God given dignity, as those also created in the image of God. Slavery strips slaves of their dignity by accessing the fruits of their labour while in the process stripping them the right to earn a fair income. It is also inconceivable that one can claim to love God and neighbour, while one is, at the same time, engaging in the practice of slavery, which is an evil act and a scandal of religion (Outler 1964:86). For Wesley the evil that was slavery had to be vehemently opposed and finally abolished (Field 2021:1). Furthermore, he believed that the institution of slavery is incompatible with the purpose and character of God, and invariably irreconcilable with the virtues of justice and mercy (Field 2021:8).

As alluded to in chapter two, slave trade was unfortunately widely practiced in England during the eighteenth century. This was a practice which John Wesley detested and regarded as both immoral and unjust and thus unequivocally advocated for its abolition (Field 2015:3). Consistent with his understanding of the doctrines of creation and redemption, Wesley is

recorded to have prayed for slaves: “Are not these also the works of thine hands, the purchase of thy Son’s blood? ... Thou Savior of all, make them free, that they may be free indeed!” (“Thought Upon Slavery” Works XI: 79).

In 1774, as part of his public theological engagement whose aim was to fight against slavery, Wesley wrote and distributed a pamphlet titled *Thoughts Upon Slavery* in which he advanced his unambiguous argument against slavery (Field 2015:3). This was the same year that Quakers were officially prohibited from owning slaves. As will be discussed, later, it must be noted that Quakers were vehemently opposed to slavery in all its manifestation from at least the 1600’s. It will be recalled from chapter 2 section 2.3 that Quakers, together with Presbyterians, were the most vocal challengers of political and economic establishment of the time.

In addition to this pamphlet, Wesley wrote a letter of encouragement to William Wilberforce, a member of parliament at the time and an active proponent of the abolition of slavery, and asserted:

Unless the divine power has raised you up to be as *Athanasius contra mundum*, I see not how you can go through your glorious enterprise in opposing that execrable villany which is a scandal of religion, of England, and of human nature. Unless God has raised you up for this very thing, you will be worn out by the opposition of men and devils. But if God be for you, who can be against you? Are all of them together stronger than God? O be not weary of well doing! Go on, in the name of God and in the power of his might, till even the American slavery (the vilest that ever saw the sun) shall vanish away before it (Outler 1964: 85-86)

As can be attested to by the majority view on the subject, which we allude to later in this section, Wesley was acutely aware of the normalization of slavery in England of his time and how society had been conditioned to accept it. As part of his campaign to fight for the abolition of slavery, Wesley used the letter he wrote to Wilberforce, encouraging him to soldier on, as well as pamphlets to reach a broader audience (Outler 1964:85-86). Wesley also contended that slavery was used for the immoral accumulation of wealth, and that it was an evil act (Outler 1964:85-86). To this effect he shared the same view with Wilberforce (Outler 1964:85-86).

However, Adam Smith appears to accommodate the practice contending that “slavery was ubiquitous and inevitable” (Weinstein 2021). Aligned to Smith in not outrightly condemning slavery was Locke, who, while he viewed slavery as vile, he embraced it “as a form of punishment for crimes committed” (Welchman 1995:67). Welchman further notes the contradiction presented by this line of thinking in that proper justice systems were not in existence in the eighteenth century, and that those Africans who were enslaved in plantations were sadly not convicted of any crimes (1995:67). Excluding members of the Religious Society of Friends, colloquially referred to as Quakers, Wesley’s viewpoint on slavery was unfortunately held by minority in the religious world of eighteenth-century England (Field 2021:2). Even his close friend and contemporary, George Whitfield defended the institution of slavery and himself owned slaves even as he “opposed the slave trade and the cruel treatment of enslaved people” (Field 2021:2). To the detriment of his evangelic legacy, Whitefield became a proponent for the introduction of slavery in the colony of Georgia and in a twisted way argued that slave ownership by Christians could facilitate Evangelism (O’Brien 2018, Brendlinger 2006:56-58).

The fight for the abolition of slavery got a shot in the arm in 1787 when *The Society for Effecting the Abolition of Slavery* was formed, and an anti-slavery momentum began taking shape (O’Brien 2018:162).

For their part Quakers were relentless in their opposition to slavery and their campaign for the end of slavery can be traced to the late 1600s. As alluded to earlier in this section, it was in 1774 that Quakers were prohibited from owning slaves. One primary belief of Quakers is that all persons are created equal and worthy of respect. O’Brien opines that Wesley’s *Thoughts Upon Slavery* was the first ever momentous non-Quaker tract on the subject (2018:163).

The second income stream which Wesley detested was from trade in alcohol. Wesley viewed businesses that distil and sell alcohol to be in contravention of this ethical principle, as alcohol was not life enhancing, but rather he viewed it as being destructive to both body and soul. For him alcohol trade was conducted at the expense of the health of traders and others alike (Attwell 1989:136). It is for this reason that Wesley advocated against businesses that distil or sell alcohol, as he was cognisant of the prevalent abuse of alcohol during his time, referring to alcohol as “that liquid fire” (Attwell 1989:136).



To the extent that individuals have the freedom to earn all that they can, Smith is in agreement with Wesley since this virtue is consistent with Smith's self-interest perspective (Harpham 2021). Smith was a proponent of initiatives that advanced self-interest and the notion of persons earning all they can in any manner available to them resonates, with his views. For him, individuals must not only be free to pursue their goals, but be incentivized for pursuing such goals, and therefore no restrictions must be imposed on this initiative, with only the laws of demand and supply, the so called 'invisible hand', being the accepted framework for correcting any distortion. So, while Wesley and Smith were largely in concert concerning earning all that one can earn, their views clashed once limitations were placed on how one may earn their income.

The third income stream which runs against this ethical principle is that of abuse of workers' rights and child labour. Cognisance must be taken of the fact that the eighteenth century was marked by the Industrial Revolution (Boaheng 2020:91). Neither formal employment policies were formulated nor were the rights of workers, especially child labourers, established (Tracy 1992:35). Children as young as six years of age were employed, some in mines and others sweeping chimneys (Tracey 1964:36). This type of worker and child abuse was rampant in England and repugnant to Wesley, and inconsistent with this ethical principle.

Unfortunately, the concept of labour unions was unheard of during Wesley's time, and the labour movements only came into existence in the nineteenth century, a few decades after Wesley's demise. Wesley's constant assertion of the inherent and infinite worth of each individual in the eyes of God helped set the stage for the emergence of the labour movement. Those who listened to him, heard him emphasize these human qualities and thus "working men and women reasoned that if God loved them and valued them, so should their employers and those 'set in authority over them'" (Scotland 1997:37). Soon workers were demanding improved working conditions and asserting their rights in recognition of this inherent worth and a number of Methodists were leading this charge. The Methodist movement provided an enabling environment as workers met in Methodist chapels and the class system and the love feasts were repurposed (Scotland 1997:48).

While Smith does not outrightly support labour unions, he nevertheless recognises the unbalanced power dynamics between employees and employers and "hence the need for

countervailing powers in the labour market” (Moene 2010:6-7). More outrightly, Smith posited that inequality was an essential trade-off for a prosperous economy.

Two Marxist historians hold two different views about the impact and contribution of Methodism in relation to the emergence of the Labour Movement. Edward P Thompson (1924 – 1993) viewed such a contribution as dysfunctional, contending that Methodism numbed people to submission (Scotland 1997:38). In contrast to Thompson, Eric Hobsbawn (1917 – 2012) “saw within Methodism an important element of protest” which was an essential ingredient for challenging the status quo (Scotland 1997:38).

At this point, it is worth noting that a proper understanding of the theology of work is helpful to guide us as we critically analyse Wesley’s principle of honest and life-enhancing work. For this purpose, this principle must be allowed to enter into dialogue with Pope John Paul II’s 1981 encyclical, *Laborem Exercens*. This theology of work, as espoused by the Pope, correctly contends that God ordained human beings to work and that human beings glorify and worship God by putting their best effort in the work that they do. Significantly, any production process in which a person is involved must be based on the primacy of the person over work, machinery, processes and other things (Catholic Church 1981:18). Work is made for human beings, and not human beings for work. In Genesis 1:28, a person is commanded to dominate the earth and all that is within it, and it is by work that human beings exercise this dominion (Catholic Church 1981:6). In this way, God made human beings to be co-creators with God (Catholic Church 1981:35). John Paul II correctly asserts that “in work, whereby matter gain nobility, man himself should not experience the lowering of his own dignity” (Catholic Church 1981:13). Slavery, exploitation of workers in pursuit of profit and similar mischiefs in the workplace that result in lowering the dignity of workers, must be censured.

Another matter that falls under the purview of the theology of work is that of trade unions. Accordingly, a proper understanding of the theology of work demands that workers be free to associate with whomsoever they wish to associate with, and to form and/or join unions of their choice with the aim, among others, of advancing their interests and protecting their rights (Catholic Church 1981:29). Unions are necessary vehicles through which employees engage collectively and beneficially with the owners of capital and/or their representatives.

In concluding his encyclical, Pope John Paul II makes the remarks that “the knowledge that by means of work man shares in the work of creation constitutes the most profound motive for undertaking it in various sectors” (Catholic Church 1981:36).

Thus, Wesley’s principle of honest and life-enhancing work is also consistent with a proper understanding of the theology of work.

#### **4.4 POVERTY ALLEVIATION**

England of Wesley’s time was characterised by class inequalities and abject poverty, resulting from a combination of failing crops, enclosures and mechanization of production processes (Marquardt 1992:19). To escape this poverty, some villagers moved to towns looking for better opportunities. Unfortunately, the poor in England were uneducated and not trained in any meaningful skills, and as they migrated from the villages to the towns, many of them were cut off from any traditional means of support, and were eventually pushed to even greater poverty, contributing to even more social ills (Marquardt 1992:19).

The plight of the poor was glaring for all to see. In their shame, rich people of the time, and those who could afford to, mostly responded by sending their charity through anonymous gifts to specific persons or institutions, a practice which Wesley disliked, insisting instead, on personal contact with recipients of relief, by himself and those who worked with relief in his movement (Marquardt 1992:30). He believed that contact with those in need helps give perspective to their situation and softens the heart (Marquardt 1992:30).

Since most poor people were unemployed, there developed an unfortunate narrative, to the consternation of Wesley, that “they are poor only because they are idle” (Marquardt 1992:31, Madron 1981:102). Sad as the narrative was, it led to an even sadder situation where poverty was seen as a crime punishable by confinement to workhouses. This is attested to by the three-fold approach to poverty alleviation in parishes as discussed in section 2.4 of chapter 2 above. We recall from that section that in terms of that approach, one category was that of the idle poor, who would be whipped and placed in workhouses where they were forced to work (Slack 1990:10). Wesley disagreed with both the diagnosis and the remedial actions and often preached against both, going at length to highlight the systemic causes of poverty (Marquardt 1992:31). As he attacked such baseless accusations through his teachings, an atmosphere was

created that helped contribute to altering public consciousness regarding poverty and its causes (Marquardt 1992:32). Unfortunately, it is in relation to laziness as a source of poverty that Boaheng completely misunderstands Wesley. He seems to wrongly claim that Wesley was implying that “laziness can also make people poor” (Boaheng 2020:93). Such a claim would run contrary to Wesley’s posture of preferential option for the poor, in which he views prevailing economic systems as enablers of poverty (Jennings 1990:20,25). Wesley did not envisage the possibility that the poor could be responsible for their own poverty.

A doctrine that partly encouraged the belief that the poor were in that state simply because they were idle was that of Predestination. Though the doctrine of Predestination had been accepted in the church over centuries, it was susceptible to abuse for the benefit of the elites. For instance, leaders and priests avowed that poverty was a God-ordained status for the poor (Tracy 1992:45). To the contrary, “Wesley did not see the awful conditions of the poor as willed by God”, but rather viewed their plight “as contradiction of God’s salvific will!” (Tracy 1992:45). A matured Wesley had become a staunch advocate for the doctrine of Salvation by Grace through Faith, arguing that God offers universal redemption to all, and that all persons can be saved, both temporally and eternally (Gunter 2011:2). For Wesley, predestination undermined God’s love and God’s justice, two central attributes of who God was.

As always, Wesley believed that his efforts were part of God’s redemptive work undertaken by him and his Methodist movement. His preaching about God’s love for all people, and his emphasis that true Christianity does not merely consist of right religion, albeit lifeless, but in “the love of God and of all mankind” (Marquardt 1992:32). The love of God and of neighbour is the basis for and fundamental point of ethics as captured in the gospel of Matthew:

Jesus replied: “‘Love the Lord your God with all your heart and with all your soul and with all your mind.’ This is the first and greatest commandment. And the second is like it: ‘Love your neighbor as yourself (Matthew 22:37-39).

Furthermore, for Wesley, every person must be saved, because Christ died for every person, and “constitutes an unforgettable value of all people, but especially of the poor – they have

very little or nothing of value to call their own, except that they are bought with the blood of Christ” (Marquardt 1992:32).

It appears as if Smith did not recognize the existence of poverty in England. For him “poverty was a non-issue. It afflicted only the lowest stratum of workers” (Gilbert 1997:284). Real poverty, in his *Wealth of Nations* framework, exists only when there is a failure to secure life’s necessities (Gilbert 1997:283). In his world view, conditions of malnutrition, hunger, lack of shelter and lack of clothing did not obtain in the England of his time (Gilbert 1997:275). He reduces destitution to only be obtainable in “stationary” economies and points to China as an example of such an economy and in his perspective, England’s economy was not “stationary” (Gilbert 1997:285). Smith’s perception of life was clearly inconsistent with the daily lived experiences of the poor of England.

It is worth remembering that chapter two sought to give a detailed analysis of the context of poverty, and this study hereby refers to the chapter as it explores how John Wesley lived out his faith through his work with and among the poor in society.

At a practical level, it was observed by Marquardt (1992:27) that Wesley used numerous mechanisms to help to relieve the plight of the poor, either on his own, in collaboration with independent groups or through groups that he himself set up. As alluded to earlier, in particular, in section 4.2 of this chapter above, Wesley was sensitized of the dire circumstances of the poor, by his many travels across the length and breadth of the country, as he visited the poor and the sick in their homes and at hospital, in factories and in prisons (Marquardt 1992:28). This exposure moved him to provide relief for the poor.

One system that worked to give effect to Wesley’s relief work was the Methodist class system. Through this system, by which members met weekly, funds were collected from fellow Methodists and the majority of these funds were then distributed to the needy, “partly in cash, partly in clothing, foodstuffs, fuel, or medicine” (Marquardt 1992:28). The Methodist *Rules of the United Societies*, which came into existence in 1741, enjoined all Methodists to regularly give money and clothes to assist in the relief of the sick and the poor. This system proved remarkably effective for purposes of helping relieve the poor of their burdens. To the credit of Methodism, this system, in terms of which the so-called ‘poor funds’ are collected and used for the benefit of the poor, is still practiced in Methodist societies to this day

(Attwell 1989:137). In severe circumstances, Wesley would himself travel soliciting funds from potential donors to help with extraordinary distress caused by failed crops, severe winter weather, and natural disasters. Requests for special collections would also be made to members of class meetings for unexpected circumstances such as the ones above (Marquardt 1992:28).

Between 1746 and 1747, Wesley introduced medical care for the poor in London and Bristol, and “he himself dispensed medicine and treated simple illnesses” (Marquardt 1992:28). He was led into this intervention by realizing how inadequate medical care was for the poor, as well as the dismal hygienic conditions prevalent in the towns. Wesley had learnt these clinical skills while at Oxford and before leaving for Georgia, when he attended medical lectures in preparation for the possibility that there would be no physicians in the colony of Georgia (Marquardt 1992:28). He also capacitated his ‘patients’ with self-help skills, through his manual *Primitive Physics* (Marquardt 1992:29). Further editions of this manual were published even after his death, and it is recorded that the thirty-second edition was published in 1828 (Marquardt 1992:29). The above-mentioned self-help medical care is testament that Wesley was mindful of the reality that relief alone was not enough and thus he sought to encourage others to help themselves (Marquardt 1992:28). Partly due to Wesley’s efforts and engagement with the poor in this field, there began to emerge medical care facilities for a large number of the population, as free dispensaries were established by physicians and pharmacists across the country (Marquardt 1992:29).

Levels of poverty were disturbing to Wesley and in its response, he introduced two other schemes, that is, the loan scheme and a job finding scheme (Marquardt 1992:29). In terms of the loan scheme “interest-free loans could be secured for up to three months from a “loan fund,” to the basic capital of which Wesley had contributed from his own savings. The loan amount was first limited to twenty shillings, but later raised to five pounds” (Marquardt 1992:29). Wesley put up an initial capital of thirty pounds, which within a period of one year was able to give assistance to more than 250 persons, thus saving them from the extortionate interests demanded by lenders, which would have only worsened their situations (Marquardt 1992:29). Wesley did not make any profit from this scheme, as the loans were interest-free, and its operations were handled by administrators that he had set up for this purpose from the very onset. The loan scheme, which he called the Benevolent Loan Fund, was launched in

1747 and is recorded to have still been operational by 1772 when the borrowing limit was raised to five pound (£5) (Attwell 1989:138). It is safe to conclude that the loan scheme existed and was operational for a minimum of twenty-five years, and one of the loan recipients, Lackington, became a well-known bookseller and existed into the late twentieth century (Attwell 1989:138).

The scheme for finding jobs, “to which Wesley constantly devoted himself”, was a direct response to unemployment, which he recognized as one of the primary causes of rampant poverty (Marquardt 1992:29). This scheme proved to be more difficult to execute, and thus Wesley thought it would be wise to change focus from seeking employment to actively initiating work projects on a regular basis. The first such work project was carried out in a former cannon foundry, wherein that winter twelve men were employed in the spinning of cotton and later women were brought in to knit (Marquardt 1992:29; Attwell 1989:138). About this project, Marquardt concluded: “How many received such assistance or how long this project continued is not known, but we do know that Wesley suffered public suspicion and accusations about it” (1992:29).

As evidenced from the above discourse, Wesley was a practical theologian and sought to express his faith through actions that were meant to assist others, especially the poor. He did not just watch and theorize about the plight of the poor. He did something about it. Some of his actions were received well, and others with suspicion. He was a passionate trailblazer and expressed the love of God and neighbour through his many initiatives. On the contrary, his contemporaries, like Adam Smith, merely theorized about issues that affected their community. Smith was a member of the Select Society, which was a society for intellectuals in Scotland and whose members were preoccupied with discussing ideas and innovations. Birch notes that Smith, in his book, *The Theory of Moral Sentiments*, “often writes of the virtues of beneficence (which includes acts of charity, kindness, love, friendship, and the likes)” (1998:25). However, Birch continues to observe that his seminal book *The Wealth of Nations*, advances an argument that negates his very writings about such virtues, when it posits, that economic altruism is largely unnecessary for in his view the competitive market is populated with prudent and just individuals, a concept that seems to be the core of the book’s theoretical argument (Birch 1998:25). Notably, Smith, a philosopher and political economist, misunderstood poverty, and unlike Wesley, was never once practically involved with the poor

at their level. Gilbert illumines a quote from Smith's *Theory of Moral Sentiments* to summarize Smith's attitude towards poverty when he contends, "the peace and order of society is of more importance than even the relief of the miserable" (1997:279).

As alluded to in section 4.2 of this chapter, there was an apprehension that the persistent food crises had the most potential to lead to a revolution (Kingdon 1957:344). However, England never experienced a revolution that was experienced by many other European countries, especially France. To understand the rationale for this eventuality, the Halévy Thesis becomes instructive. The Halévy Thesis postulates that it was the rapid growth of Methodism in the first half of the nineteenth century that thwarted any possibility of an English Revolution (Itzkin and Halévy 1975).

In sections 2.2 and 2.3 of chapter two, we analysed extensively how Jacobites had been relentless in their pursuit of a revolution against Hanoverian rule, notably between 1688 and 1750. They detested the Hanoverian rule and sought to dislodge it by all and any means possible. Though their political influence had diminished by 1750, their ideals remained part of an inescapable reality of English life. The dawn of the French Revolution provided an opportunity for a revival of a rebellion that would flare in England, with the most potential in helping to ultimately realize the Jacobite long-held goal. Poverty and hunger were propelling food riots. The ground was fertile for such a possibility. It is in cognisance of this reality that Halévy, in his work, *History (volume 1)*, proclaimed that "Methodism was an antidote for Jacobism" (Itzkin and Halévy 1975:53). The authors contend that the Wesleyan evangelical revival of 1795 to 1815 had a conservative influence on English society which had the effect of softening any revolutionary spirit. Ostensibly, the authors propose, this may explain why England experienced the least revolution and one which was "most exempt from violent change", compared with revolutions that were taking place in other European countries (Itzkin and Halévy 1975:53). Since Wesley had chosen to evangelize to the poor and working class, it is at this lower social level that the religious impulse began. Soon, the evangelical impulse became accepted by the upper classes, perhaps initially because of the recognition that "this new enthusiasm could be fruitfully channelled and used as a possible support of order and stability" (Itzkin and Halévy 1975:52).

The Halévy Thesis is supported by historians such as V Kiernen, Kiston Clark, Semmel and the Hammonds (Itzkin and Halévy 1975:52).



However, Thompson and Hobsbawm disagree with Halévy. Granted, there is an acknowledgment by the differing historians that as a general principle, conditions of obsolete and corrupt political system are factors that need to be present for a revolution to take place (Itzkin and Halévy 1975:50). For Hobsbawm however, two other factors are essential for a revolution to take place, following from Lenin's wisdom, and these are a crisis in the matters concerning the ruling elite and a group of revolutionaries capable of sustaining a revolutionary movement (Itzkin and Halévy 1975:50). In addition to the absence of the last stated two conditions, Hobsbawm adds that there was also a timely compromise in 1832 that potentially helped circumvent any further agitation (Itzkin and Halévy 1975:50). The Representation of the People Act of 1832 introduced significant changes to the electoral system of England, by granting the right to vote for tenant farmers, small landowners, and most of the previously disenfranchised citizens, albeit this dispensation excluded women from voting. However, Grant surmises that Thompson was of the view that "neither the middle class nor the working class was revolutionary as they were under the spell of the evangelical spirit, "from which the established order had nothing to fear"" (1977:439). Essentially, the two historians denounce Methodism's influence in averting an outright revolution as insignificant (Itzkin and Halévy 1975:50; De Gruchy 1993:2). Itzkin contends that in the final analysis, and as alluded to in an earlier paragraph, historians generally tend to support the Halévy Thesis (Itzkin and Halévy 1975:47).

As we conclude this section, we are reminded of the maxim that unemployment and poverty are two sides of the same coin Madron (1981:102). Madron avows that Wesley recognized this paradox when he stated that poverty can be remedied in the first instance by creating work (1981:111, *Thoughts on the Scarcity of Provision*).

Prior to Wesley, care for the marginalized, poor, prisoners and unemployed, as championed by Wesley, was unheard of. During his lifetime, and popularized by his efforts on many fronts, including visiting prisoners, which was started at Oxford by the Holy Club, the care of the poor and marginalized took a compassionate form. This is testament to Wesley's positive influence on England of his time. Because of Wesley's efforts, compassion became fashionable and a social climate that facilitated the much-needed social reforms at the time emerged (Marquardt 1992:30).

Wesley chose and believed that it was God's will for his ministry, to proclaim God's justifying grace to an audience that was unchurched and poor (Marquardt 1992:27). For him, God's grace was revealed by his redemptive act, that results in healing and transformation.

Considering the work that Wesley did with the poor, it is not surprising that Jennings (1990) surmises that Wesley had a "preferential option for the poor", meaning that in all that he did, he placed the needs of the poor and their perspectives first. Wesley believed that the poor could not be blamed for their poverty, but rather entrenched economic systems were creating systemic unemployment and poverty. These are the social ills that Wesley sought to fight against in all his practices as he worked tirelessly to relieve the poor of their burden, seeking and creating employment opportunities for their benefit and advancing soft interest-free loans to help them set up and grow their businesses.

In this section, the focus was on the ethical principle of poverty alleviation as foundational to the Wesley economic ethics and how these were expressed in Wesley's ministry. The section did not probe deeper into other works that Wesley did with prisoners, in orphanages and homes that he worked with as well as schools that he helped established as part of his broader ethics. Such an examination is generally associated with his social ethics and can be a subject of another project.

The next section will seek to explore the ethical principle of equitable distribution of wealth.

#### **4.5           EQUITABLE DISTRIBUTION OF WEALTH**

As alluded to in section 2.4 of chapter two, life in eighteenth century England was full of contradictions and society had become very unequal. Opulence existed side by side with abject poverty. The learned were held in high esteem while the uneducated poor were treated as trash. Girl children and women in general were excluded from the education system. As we saw in section 3.2 of chapter three, it took dedicated mothers like Suzanna Wesley to ensure that all her children, including girl children were educated. Lack of education became a huge entry point for inequality in society. The rich could leave bequests for their children and loved ones giving them an advantaged status in life.

An aspect that is worth reflecting on at this moment, and one which has been discussed in great detail in chapter two, is that of enclosures. Traditionally, villagers or common people in England, owned common land for planting and grazing. Over time, there emerged a class of people that began to take advantage of the Enclosures Act and bought tracts of land for their exclusive use and occupation. Effectively, the common people were displaced from their land and the new owners of the formerly common land, who eventually ended up owning just about every single acre of land in England, forbade villagers and their flock from accessing natural resources such as water and grazing pastures that were now enclosed. What were originally tracts of common land, used for the benefit of communities at large, were now enclosed into private property. Water resources and grazing land became the preserve of the rich. There were very limited places where the livestock of common people could graze and drink water, and naturally villagers became susceptible to being accused of ‘trespass’ in enclosed land. Consequently, the livestock of common people were taken away from them under the guise of ‘trespass’. These displacements had the effect of worsening poverty among the common people and increasing levels of inequality in the country.

It was a mature Wesley who wrote the *Sermon on the Good Steward* in 1768. The sermon was based on Luke 16:2. In the sermon, Wesley posits that everyone is a steward for God, entrusted with resources, which everyone must use, not as everyone pleases, but as God wills (Outler, A and Heitzenrater 1992). This delegated authority is for a limited time only (Marquardt 1992:37). Accordingly, this means that everyone must use these resources to meet his/her basic needs and any surplus must then be used to the benefit of others (Outler, A and Heitzenrater 1992; Marquardt 1992:36). Anything else, Wesley believed, is equivalent to defrauding God (Oden 2014:76). Locke disagreed, theorising that a person’s property is that person’s inalienable right which she/he can use as she/he deems necessary and defend accordingly (Madron 1981:107). Unlike Wesley and Locke, Smith was silent on matters relating to resources in a strict sense, safe to hold the view that societies that defend their properties advance their prosperity (Skoble 2019).

Still in the *Sermon of the Good Steward*, and in a typical Wesleyan way, Wesley defined what he meant by basic needs. Basic needs, he argued, meant only those things that are required for sustaining one’s life. He then used the text of Luke 16:2 to expound what good stewardship entails. For him, a good steward is one who uses all resources to the glory of

God, and as an expression of one's love for God and for all persons (neighbour) (Marquardt 1992:35-36). In using these resources, especially money, Wesley repeats God's intention that they must first be used to meet necessities of our families, and then to restore any surplus to God, "through the poor, whom I have appointed to receive it" (*Sermon on the Good Steward*). In his view the right ordering of usage of resources is first to meet the needs of one's family, then to those of the household of faith, and lastly the needs of all those who are in need. Significantly, as already noted in section 3.3, for Wesley good stewardship entails the redistribution of wealth from the prosperous to the poor.

The second sermon that Wesley used to advocate for the equitable distribution of wealth is the one *On the Use of Money*. To recap, the three rules in the *Sermon on the Use of Money* are "earn all that you can; save all that you can; and give all that you can". As alluded to earlier in the chapter, the second and third rules espoused in the *Sermon on the Use of Money* are most relevant to this ethical principle.

In calling for Methodists to save all they can, Wesley is not impressing upon Methodist people to put their money in saving accounts with banks or interest-bearing instruments as part of wealth creation, but instead he is calling for frugality, the cutting of all unnecessary expenditure, such as fancy clothes and luxurious living (Marquardt 1992:37). The significance of this rule is captured by Wesley's command, "lay out nothing to gratify the pride of life, to gain the admiration or praise of men" (*Sermon of Use of Money*; Oden 2014:65).

Flowing from this rule, Methodists are called upon not to seek to gratify the desires of either their eyes or their flesh, but rather to work towards relieving the poor of their burden (Attwell 1989:137). These rules also help in the fight to eradicate inequality in society, a phenomenon that results from unequal access to employment opportunities as well as the skewed distribution of wealth.

Concerning the third rule, Wesley taught that whatever it is that has been saved must then be given to the poor, "first to those of 'the household of faith' and then to others, and thus to God" (Marquardt 1992:37). This is the essence of the third rule. Money, like all goods of differing kinds, has been entrusted to us only for a season, Wesley believed. It is by giving all that we can that we avoid storing up treasures for ourselves on earth (Oden 2014:67).

Accordingly, Wesley noted that, observing these rules helps in alleviating the stress of others and is a fulfilment of the commandment to love one's neighbour as one loves oneself (Marquardt 1992:37). The first two rules are only useful to the extent that they are meant to fulfil the third rule, being to give all that one can.

As noted in an earlier section of this chapter, it is not the first rule in *Sermon on the Use of Money* that Smith is opposing, but rather the subject of this section, that being the second and third rules as evidenced by Harpham's contention that "for Smith, individuals are committed "first and principally" to looking after themselves" (2021). Smith stood for initiatives that benefitted an individual, in the hope that such gain will eventually benefit society, even if marginally.

*The Sermon on the Dangers of Riches* is yet another sermon that amplifies Wesley's economic ethics. According to Wesley, a person is rich if he remains with surpluses after paying for essentials of life and debts. Expounding on the text 1 Timothy 6:8-9, Wesley argues:

"Having food and raiment," (literally coverings; for the word includes lodging as well as clothes) "let us be therewith content." "But they that will be rich;" that is, who will have more than these; more than food and coverings. It plainly follows, whatever is more than these is, in the sense of the Apostle, riches; whatever is above the plain necessities, or at most conveniences, of life. Whoever has sufficient food to eat, and raiment to put on, with a place where to lay his head, and something over, is rich. (*Sermon on Danger of Riches*).

By Wesley's definition, essentials exclude anything deemed luxurious such as flamboyant dressings *etc.*, as these seek to gratify the desires of the flesh/heart (Oden 2014:71). By seeking happiness from material possessions (riches and those things which riches may acquire) and not God, a person finds something to worship at the expense of his/her God, easily making a transition to idolatry - worshipping and loving the Creator's creation (Oden 2014:76). Riches have the greatest potential of keeping "the soul dead – dead to God and all true religion" (*Sermon on Riches*). Wesley believed that rich people are exposed to temptations of desires for uniqueness, new and beautiful things, leading Wesley to exclaim "now how numerous are the temptations to this kind of idolatry, which naturally springs from

riches!” (*Sermon on Riches*). Wesley proceeds by asserting that riches bring applause. Sadly, it is impossible to accept the applause “without being ostensibly induced to think of himself (sic) ‘more highly than he (sic) ought to’” contending further that praise is poisonous to the soul (*Sermon on Riches*). In the end, the danger that is posed by riches stems from the temptations and snares that are visited upon the rich by these riches, as Paul warned in the first letter to Timothy. Wesley therefore advised against the notion of creating wealth and advocated for the distribution of any surplus resources to the poor.

Regarding bequest and following from this advice against building wealth, Wesley advised the People Called Methodists to bequeath only what would be sufficient to sustain the livelihood of their heirs, and that any surplus must likewise be given to the poor, to the glory of God (Oden 2014:66). In giving all that we can, we are giving to God, who did not spare his Son for our redemption (Oden 2014:68). Wesley was exemplary with his rules. For instance, he gave the majority of his personal earnings to the poor. It is recorded the sales of his published work could have made him a very rich person and guaranteed him a luxurious life, and yet he lived on a meagre thirty pounds (£30) per annum to meet his basic personal needs and gave away in excess of one thousand four hundred pounds (£1,400) every year to the poor (Attwell 1989:137). This gives testimony that the majority of his earnings were shared with the poor in various ways including capacitating the Benevolent Loan Fund and his many relief efforts. Attwell (1989:137) surmises that Wesley had nothing to leave as an inheritance because he was ‘worth nothing’ upon his demise. Wesley truly lived what he preached.

In relation to enclosures, Tracy estimated that “during Wesley’s life, some 2,500 tracts of once common land were enclosed and taken from the people” (1992:38). However, while Wesley was rightfully concerned for the poor and showed unequalled compassion for them, he was disturbingly silent on this most repressive regime of his time the Enclosures Act.

This chapter has repeatedly demonstrated that the motivating factor in Smith’s perspective was personal interest. The interests of the poor (common people) were of no bearing at all to him. Whether it was in relation to equitable distribution of wealth and opportunities and land ownership (enclosures), what mattered to him was pursuit of profit for personal gain. So, for him the rich were within their right to dispossess many of their land because they saw an opportunity for themselves and acted on that opportunity.

Smith viewed economic surpluses as a foundation for economic prosperity, whereas Wesley regarded it as a worldly sin (Maddox 2002:62). It did not worry Smith that this creates inequalities in wealth and income. He also suggested that the wealth of a few benefits society at large and held in high regard conspicuous consumption by the rich on the basis that it helps create demand and by extension increased employment (Gilbert 1997:277). It can be observed that Smith was concerned more about economic prosperity than about inequality *per se* (Birch 1989:25). He accepted inequality as a permanent feature of society and does not seem to be worried about it at all (Gilbert 1997:280).

#### **4.6 CONCLUSION**

The fact that John Wesley never sought to systematically propose economic ethics is not in dispute. His major concern was on the experiences of his hearers as he wrestled with practical solutions for their dilemma. Indeed, his belief that “the Gospel of Christ knows no religion but social, no holiness but social holiness” convicted him to wrestle with issues of unemployment, poverty and inequality of his time and propelled him to find ways to practically express his faith in the midst of all this brokenness (Attwell 1989:134).

A critical examination of his writings, sermons, tracts and letters has been helpful in articulating what may be his economic ethics. It is therefore imperative that the above four ethical principles be seen in unison and as the cornerstone of Wesley’s economic ethics. The first ethical principle is based on Wesley’s belief that the mercantilist system, and by extension the capitalist system, could never have the interests of the general population at heart, and less still, of the poor and the marginalized. Hence, he called for government intervention in the economy. For him, unrestrained capitalism should not be allowed to take hold.

Secondly, Wesley also understood that, where certain sections of society had unconstrained power, the poor were vulnerable to their abuse. Consequently, in their state of vulnerability, they may become inclined to cause harm to others and to themselves as they desperately try to find ways to make ends meet. Wesley thus advocated for honest and life-enhancing work to restrain both workers and their employers. Flowing from Wesley’s work and influence, slavery was ultimately abolished and the greed for profit at the expense of workers mitigated against with the evolution of the labour movement, albeit years after his death.

Thirdly, as industrialization brought levels of inequalities never experienced before in eighteenth century England, mercantilists chased after profits by underpaying and/or laying off workers and land barons seized tracts of land, leaving many families unemployed, homeless, poor, and destitute. Some rich people engaged in work of philanthropy by sending anonymous donations to charity houses. This type of charity was detached from the suffering of the masses and degrading. Wesley had the presence of mind to be involved in personalized and compassionate poverty alleviation work with the poor in their spaces. He understood that the poor were not poor because they were lazy, but instead that their poverty was driven by forces beyond their control. Poverty is systemic and should be understood correctly in order to provide appropriate relief. Wesley's poverty alleviation efforts were a safety net that ensured that the dignity of recipients of his charitable work was not compromised. His compassionate involvement is recorded to have influenced a movement towards more compassionate relief work, including state sponsored healthcare facilities. His teachings and work in relation to this ethical principle of poverty alleviation, is largely credited for having helped avert a violent revolution and created an environment where essential policy and legislative changes could be affected for the benefit of the broader English society.

Finally, if access to income was skewed, it became even clearer that wealth accumulation could not be any less skewed and levels of inequality would soon reach unsustainable levels, hence the need to advocate for equitable distribution of wealth. By advocating that "The People Called Methodists" give all that they could and thus giving to God, Wesley embarked on a wealth distribution programme, at least within the Methodist movement.

These four ethical principles, the need for government intervention in the economy, honest and life-enhancing work, poverty alleviation, and equitable distribution of wealth, underpin John Wesley's economic ethics. These principles are contained in his sermons, letters, pamphlets, tracts (treatises) and other public engagement that he engaged in as a public theologian. Wesley may have been silent on the Enclosures Act and the English Poor Laws, as well as the impacts of their implementation, but his work with the poor was largely successful.

In the next chapter, we will undertake a contextual review of the socio-economic conditions of contemporary South Africa. The objective of the review in the next chapter is to prepare for a dialogue between these socio-economic conditions and John Wesley's economic ethics,



which is a subject matter of the subsequent chapter, chapter six. This dialogue will seek to determine whether there are lessons to be learnt from the said ethics, and if so, further determine their relevance in addressing the socio-economic conditions of contemporary South Africa.

## **CHAPTER FIVE**

### **SOCIO-ECONOMIC CONTEXT OF CONTEMPORARY SOUTH AFRICA**

#### **5.1 INTRODUCTION**

In the previous chapter, we discussed the four ethical principles that underpin John Wesley's economic ethics. Having illumined Wesley's economic ethics, this chapter now turns to assessing the socio-economic context of unemployment, poverty and inequality that exists in contemporary South Africa. The objective of this assessment is to lay the groundwork for the following chapter - chapter six – which will investigate whether there are any insights that can be learnt from Wesley's economic ethics, as outlined in chapter four, and possibly appropriate the same in order to address the said socio-economic conditions.

For purposes of this study, contemporary South Africa is described as a period that spans from the date of the launch of the National Development Plan (NDP). The NDP outlines policies and strategies that were adopted by the government of the Republic of South Africa (RSA) in 2012 and formally launched as a government policy blueprint on 12 August 2012. As a precursor to the adoption of the document, a draft NDP was released in November 2011. Accordingly, the aim of the NDP is to “eliminate poverty and reduce inequality by 2030” (NPC 2011). Since the NDP is intentional in pushing back the levels of unemployment, poverty, and inequality in South Africa, we have determined that it would be appropriate to use it as a benchmark while dividing the study into three periods. The first period will focus on the historical period ending on 31 December 2011. The significance of 31 December 2011 is that it is an interval point leading to the adoption and ultimate launch of the policy document while also recognising that it was in November 2011 that the draft NDP was released.

The second and third periods will discuss the contemporary period and link to the COVID-19 pandemic. The second will represent the PRE-COVID-19 contemporary context, while the third will represent the POST-COVID-19 contemporary context. This to indicate that the study acknowledges the impact of the COVID-19 pandemic on economic activities in South Africa and how it interrupted its development trajectories. The existence of the severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) virus was first discovered in Wuhan, China in December 2019 and the first case of COVID-19 infection in South Africa was reported by the country's National Institute of Communicable Disease (NICD) on 5 March

2020.<sup>41</sup> Consequently, the study has elected to analyse relevant data for the financial quarter before the virus reached the South African shores and to that effect has set 31 December 2019 as the second interval point. The study will also analyse appropriate data at a point during the pandemic and has chosen 31 December 2021 as the third interval point. This last interval point represents a period of twenty-four months since the virus first emerged in Wuhan. It is the view of this study that this last interval point provides us with an opportunity to grapple with the impact of the pandemic up to that stage.

In this study, the NDP will form the anchoring document of this chapter. In addition, work done by the ILO and StatsSA will be used primarily as sources in the analysis on the state of unemployment in the country. In relation to poverty the Human Development Index (HDI) and StatsSA's 2015 Poverty Survey (this being the latest such survey by StatsSA), will be used to analyse the contexts of poverty. Finally, a combination of sources, including the Gini coefficient, will form a basis for a comprehensive analysis on inequality. Importantly, our analysis will focus on disaggregated data categorised into five, viz. by universal statistics, by race, by gender, by age, and by educational qualification. Disaggregated data is seen as generally more useful than aggregated data (McCaston 2005). The first category gives us a broad picture pertaining to the country and the last four are the major categories that distinguish differences in our society (NPC 2011:5). We will then compare South Africa's economic situation with that of the global economy as well as the economies of countries in the global south. Since the South African economy is classified as a dual economy, where the first world economy exists alongside a developing economy,<sup>42</sup> this comparative study will assist in benchmarking the South African economy like for like.

However, the study accepts that using race as a feature in comparing South Africa's socio-economic conditions with those of other countries will be of limited usage, because South Africa has a unique history of institutional racial discrimination. Yet race cannot be ignored within an analysis of the South African context as racial categories are a dominant feature of socio-economic conditions, and thus in relation to race our focus will be limited to internal dynamics, and less on comparison with other regions and countries. The next section will seek to outline the historical contexts upon which the South African society is based.

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<sup>41</sup> Available on NICD website <https://www.nicd.ac.za> [Accessed on 30 November 2020]

<sup>42</sup> Lappeman J., et al. 2020:333

## **5.2 A BRIEF REVIEW OF THE HISTORICAL CONTEXT OF SOUTH AFRICA**

This section seeks to do a contextual analysis of the historical context that precede our stated contemporary era. The section recognizes that in addressing the triple challenges of unemployment, poverty and inequality facing contemporary South Africa, it would be remiss to disregard the country's historical context. For over 350 years South Africans were subjected to brutal power structures that impoverished and excluded the majority of the population from access to basic human rights (Gumede 2021:184). Specifically, a two-tiered education system was legislated and implemented in the last century with the sole purpose of solidifying uneven development and access to resources and opportunities. This concerted effort resulted in huge inequalities, with the white population granted access to good education and natural resources, while the majority, made up mainly of Africans, Coloured and Indians, were excluded and denied such access. In relation of this context Katiyatiya (2019:203-204) correctly contends that “[i]n South Africa, both poverty and inequality have an irrefutable structural or systematic character and have been shaped and created over a long period by power structures on which the systems of colonialism, segregation and apartheid were based”. The economy was structured to serve the white populace, which represented a fraction of the entire South African population. Cloete contends that “structural unemployment implies the overall inability of an economy to provide employment for the total (or potential) labour force, even at the peak of its economic cycle” (2015:515). While it is accepted that these social ills are structural in character, it is further acknowledged that there exists an interconnectedness between them, albeit there also exists differences between the three, especially between poverty and inequality (Ward & Himes 2014:130; USCCB 2013).

Since the democratization of South Africa in 1994, successive democratic governments have been attempting to reverse the above-mentioned socio-economic challenges, but have unfortunately not been significantly successful (NPC 2011). It shall be demonstrated in the next section – on the South Africa's Development Policy Framework - that it has not been as a result of lack of policies that the government has failed, but rather failure to bring change can be attributed to lack of capacity or will to implement these policies on the part of the state (Katiyatiya 2019). It is also worth noting that poverty and inequality mostly affect those who are unemployed (Katiyatiya 2019:212, Seekings & Nattrass 2005).

A preview of data over the last four decades reveals economic growth that did not create employment (Cloete 2015:515). The highest GDP growth experienced since 1980 was recorded in 2006 at 5.60%, but this economic performance was not sufficient to propel employment creation (NPC 2011; Odhiambo 2015:396). Chirwa & Odhiambo (2015:21) attribute the inability of the South African economy to create employment on the lack of human capital development, asserting that human capital development is vital to economic growth. It is thus evident that, despite its best efforts, the economy has not been growing at rates that support sustainable job creation. In response to this dilemma, the National Development Plan enjoins the South African government to create a society in which poverty is eradicated, inequality reduced, underpinned by an economy that grows by an average of 5,4% pa, with the unemployment rate reduced to 6% by the year 2030 (NPC 2011:28). Accordingly, education, training and innovation have been identified as critical drivers for the attainment of the above-mentioned goals (NPC 2011:284 - 285).

By contrast, the economy of China, also seen as a developing country, has been the fastest growing economy in the world over the same period, and this economic growth succeeded in creating jobs and lifting millions out of poverty. Data released by the Chinese government indicates that from 1978 to 2005, the Chinese economy grew at an average annualized rate of 10%. That economic performance was mainly propelled by enterprise development, leading to many jobs being created. Consequently, the standard of living of China's citizens improved drastically. The number of people living below the poverty line dropped from 250 million in 1978 to 42 million in 1998<sup>43</sup>.

In an effort to emulate countries such as China, the South African government has been actively engaged in policy development trying to create a conducive environment to tackle issues of unemployment, poverty and inequality since the dawn of the democratic era. The next section deals with that engagement.

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<sup>43</sup> China 2003. "Statistics Show China's 50-Year Economic Development". Available online from <https://www.fmprc.gov.cn/ce/celt/eng/jmgx/jjxs/t124869.htm> [Accessed on 05 January 2022]

### 5.2.1 South Africa's Development Policy Framework<sup>44</sup>

A brief engagement with the concept of what policies are suffices for this study. The Merriam-Webster online dictionary defines the word policy as “a definite course or method of action selected from among alternatives and in light of given conditions to guide and determine present and future decisions”<sup>45</sup>. The SA government defines policy as:

the organisation's stated position on internal or external issues. It provides the written basis for an organisation's operations and informs legislation, regulations and the organisation's governing document. A policy is typically based on a government's political priorities, usually contained in the governing party manifesto and part of its programme of action<sup>46</sup>.

Policies provide society with guardrails around which certain things must happen and create systems. Writing in favour of establishing and maintaining systems, Nürnberger asserts that “systems *give shape to the realm of human freedom*, nothing more”, further emphasising that systems have functions of both restricting and protecting freedoms (1998:186). He theorizes that systems are bad to the extent to which they restrict freedom and yet good to the degree to which they protect the same freedom. Good systems are fluid allowing a healthy tension between the protection of freedoms, and their restriction. Indeed, there can never be a blueprint that determines which levels of protection and restriction should be adopted holistically. These will vary depending on contexts (Nürnberger 1998:187).

While the study agrees with Nürnberger (1998:186) that systems do indeed give shape, there is a sense that he is limiting this shape to human freedom to the exclusion of all other virtues. It is the submission of this study that other virtues found in economic systems are also impacted by systems in a similar way that systems impact on human freedom. To give context, systems do also give shape to equality.

Nürnberger makes the argument that “policies should be guided by pragmatism, not ideology” (1998:186).

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<sup>44</sup>Obtained from <http://www.sahistory.org.za/article/south-africa%E2%80%99s-key-economic-policies-changes-1994-2013> [Accessed on 26 August 2021]

<sup>45</sup> Obtained from <https://www.merriam-webster.com/dictionary/policy> [Accessed on 16 June 2022].

<sup>46</sup> The National Policy Development Framework (Approved by Cabinet on 2 December 2020) page 8, obtained from [https://www.gov.za/sites/files/gcis\\_document](https://www.gov.za/sites/files/gcis_document) [Accessed on 16 June 2022].

Successive democratic governments in South Africa have identified unemployment, poverty, and inequality as three undesirable social ills. In waging a war against unemployment, poverty and inequality, these governments in a democratic South Africa have adopted several policies. First was the Reconstruction and Development Programme (RDP) of 1994, whose primary goal was to meet the basic needs of the poor by rebuilding and transforming the economy, thereby pursuing a more just and equal society (Visser 2005:6, Pieters 2016:55-61). When the RDP was perceived as flawed, it was abandoned and closely followed by the Growth, Employment and Redistribution (GEAR) in 1996 (Visser 2005:7). GEAR represented a change in focus of the RDP toward faster economic growth and this policy change sought to fast-track employment creation. In a nutshell, GEAR reversed the focus. Whereas the RDP sought to effect “growth through distribution”, GEAR was focused on effecting “redistribution through growth” (Visser 2005:9). However, GEAR was not universally accepted within the ruling elite. Congress of South African Trade Unions (COSATU), a member of the ruling tripartite alliance and the largest labour federation in the country, was the chief opponent of this policy framework (Pieters 2016:70). When this neoclassical framework proved flawed, the government introduced the Accelerated and Shared Growth Initiative for South Africa (AsgiSA) policy in 2006 under the Presidency of Mr. Thabo Mbeki. AsgiSA was aligned with the MDGs and had the target of halving poverty and reducing unemployment to 15% by 2015 (Pieters 2016:72). Sadly, AsgiSA was also not successful and was replaced by the New Growth Plan in 2010 under the presidency of Mr. Jacob Zuma. As Chirwa & Odhiambo (2015:396) observed, a common trend had emerged over the years which illumined the reality that South Africa’s economic performance was characterized by an economic growth that yielded no meaningful reduction in the number of the unemployed. Likewise, the New Growth Plan policy framework had a short lifespan and was replaced by the National Development Plan (NDP) in 2012 when the government adopted it as a policy framework for future economic growth and a roadmap for the country’s socio-economic development strategy. The plan envisioned a context where extreme poverty is eliminated, inequality reduced, and the rate of unemployment reduced to 6% by the year 2030 (NPC 2011:26,28). In relation to inequality, the NDP committed to a reduction, as measured by the Gini Coefficient, from a level of 0.7 in 2011 to 0.6 in 2030 (NPC 2011:3,28, StatsSA 2019b:26). What has become clear from the above is the constant review of the

impacts occasioned by each policy position, with special focus on job creation, and the willingness to change course.

StatsSA (2008:3) recognised that alleviation of poverty and elimination of inequalities, both predominantly inherited from the apartheid era, have been central in the many policy developments discussed in this section.

Yet, despite commendable achievements listed in the previous section, modest as they may be, levels of unemployment have remained consistently high, poverty endemic and inequality unabated. For instance, the results of the fourth quarter of the Quarterly Labour Force Survey (QLFS) of 2015 show that unemployment in South Africa was at 24,5%, down from 25.5% in the third quarter. Chibba & Luiz (2011:308) surmised that “South Africa suffers from deep structural inequalities and structural unemployment that have a direct bearing on poverty”. This assertion can be attested to by varying levels of unemployment specifically in relation to educational levels attained.

In affirming that unemployment, poverty and inequality are undesirable social ills, the National Development Plan acknowledges that “South Africa’s principal challenge is to roll back poverty and inequality” through, amongst other strategies, sustained efforts which should be aimed at creating employment for the citizens of the country (NPC 2011a:25). The NDP further notes that unemployment and poverty are two different sides of the same coin.

It is essential that definitions of these major social ills facing the country are offered so that we are able to problematize them and distinguish these from other social challenges. Thus, an attempt at defining or describing these social ills will be offered at the beginning of each of the following sections dealing with the respective socio-economic challenge.

We now proceed to consider the Human Development Index (HDI), with a view of solidifying an understanding of what is its purpose for our study.



### **5.2.2 The Human Development Index**

The discourse about development has historically been addressed from a point of view of economic performance (Jahan 2002:1). This singular focus on economic performance failed to capture the multi-dimensional nature of development. It was acknowledged that economic performance was essential, even though it was not sufficient to attain human development (Chowdhury 1991:127).

But in 1990 this discourse took a human face as it became correctly understood that economic performance finds its value only to the extent that it enhances people's lives. By that time there was a shift from perceiving development purely in relation to economic performance, to placing people at the centre of development, thus viewing development in terms of the degree to which people's lives are enhanced (Jahan 2002:1). This shift further necessitated finding new measures, as existing measures, such as per capita income, proved less appropriate. For that purpose, new indicators evolved, and one such earliest attempt was the Physical Quality of Life Index (PQLI). While the index made serious attempts to move away from an focusing on economic performance, it was able, relatively better than other indices, to measure the quantity of life but was not able to measure the quality of life and this became its fatal flaw (Chowdhury 1991:125). Another measurement that emerged was the Human Development Index (HDI) and this one became a seminal initiative (Jahan 2002:1). It measures a country's performance in improving its citizen's health, increasing the average level of education attained and enhancing people's standard of living. While the evolution of the HDI enriched discussions around development, one of its shortcomings is its failure to take ecological considerations into account (Sagar & Najam 1998). However, the measurement, more than any of its time, is acknowledged to be the best measure of both the quantity and quality of life of the people in a particular country (Chowdhury 1991:125).

The HDI is a number ranging from 0 to 1, with one representing a state of absolute development and 0 a state of no development. Furthermore, countries that score below 0.80 are classified as developing economies. Currently, only sixty-six countries have a score above 0.80 and South Africa is not one of them. Norway, a country with a population of less than a tenth of that of South Africa, leads the pack as the most developed country in the world (HDR 2020). The United Nations Development Programme (UNDP) defines the HDI as "a summary measure of average achievement in key dimensions of human development: a long

and healthy life, being knowledgeable and have a decent standard of living. The HDI is the geometric mean of normalized indices for each of the three dimensions”<sup>47</sup>.

Unsurprisingly, the introduction of the HDI and the attendant country rankings injected competition, especially between neighboring countries. Policy makers became forced to review why their countries are lagging compared to others and thus have been induced into implementing policies that are intended to address identified shortcomings, resulting in the enhancement of conditions under which people live (Jahan 2002:8).

Naturally, governments can only hope to influence the direction and degree of the HDI by actively embarking on various programmes and interventions which are likely to result in the improvement of the lives of their citizens. Therefore, to successfully attain a favorable HDI, governments need to be intentional about intervening in the economy. At a conceptual level, the HDI can be said to have one flaw which is that it ignores ecological considerations.

According to the 2020 Human Development Report (HDR 2020), South Africa is rated as a medium human development country with an index of 0.709 at number 114 in the world, fourteen points below her neighbor Botswana (at 0.735). It is worth noting that this index is lower than the world average of 0.737. South Africa is also lagging three of her BRICS<sup>48</sup> partner countries such as Brazil (at 84<sup>th</sup> with 0.765 points), Russia (at 52<sup>nd</sup> with 0.824 points) and China (at 85<sup>th</sup> with 0.761 points), and only ahead of India (at 131<sup>st</sup> with 0.645 point) (HDR 2020). Only Russia in the BRICS block can be classified as a developed country. Continentally, South Africa is regarded as more developed than two of her major competitors. Egypt has a ranking of 116 with 0.707 points whilst Nigeria has a ranking of 161 with 0.539 points (HDR 2020). In summary, from a developmental perspective, of the three big economies on the continent, South Africa has a comparatively better development outlook, whereas she fares poorly against her BRICS partners, only surpassing India, the second most populous country in the world. Of the developing countries, South Africa is ranked number 48 (HDR 2020). This means that South Africa still has a lot to do, and it is encouraging that the country acknowledges this and has positioned herself as a “developmental state”.

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<sup>47</sup> UNDP website available online on <https://hdr.undp.org/en/content/human-development-index-hdi> [Accessed on 30 June 2021]

<sup>48</sup> BRICS is a group of emerging economies comprising of Brazil, Russia, India, China and South Africa

In that regard, Mkhandawire (2001:291) defines a developmental state as “a state whose ideological underpinnings are developmental and one that seriously attempts to deploy its administrative and political resources to the task of economic development”

Now that the study has outlined the policy framework within which the South African economy operates, and has defined the phenomenon of the HDI, the study now moves on to consider the reality of the three social ills as they pertain to contemporary South Africa.

### **5.2.3 UNEMPLOYMENT**

Unemployment remains a thorny issue in many developing countries and yet sadly, in many economies of the global south, the challenge is less about unemployment *per se* and more about the scarcity of decent and productive work (ILO 2016:2). The same phenomenon is applicable to South Africa where a mismatch between available vacancies and skills set has become a constraint to fighting unemployment (ILO 2016:2, LMIP 2016:8).

In line with the guidelines of the International Labour Organization (ILO), the Department of Statistics South Africa (StatsSA) considers that people who should be included in the definition of the labour force are only those between the ages of fifteen and sixty-four (StatsSA 2021b:3, ILO 2016:2). Furthermore, the labour force can be categorized into the employed and the unemployed, to the exclusion of those who are not economically active (NEA) (StatsSA 2021b:3, ILO 2016:2, Brandolini, Cipollene & Viviano 2006:154). Those in the NEA category include students, discouraged job seekers, home-makers and those too ill to work *etc.* (StatsSA 2021a:4). It follows from the above discussion that the labour force is the sum of all persons employed and unemployed who fall in the age group between fifteen and sixty-four years.

In order to regularly report on the state of unemployment in the country, StatsSA aligns its definition of unemployment with that of the ILO and understands the concept in terms of a strict or expanded view. The strict view of unemployment includes in the number of the unemployed only those people who are employable but are not employed and have made some efforts to become employed in the recent past. Differences in definitions of unemployment between countries occur as a result of, among other factors, the length of the time that a person last made an effort to be employed, as well as the method of such an effort

(Brandolini, Cipollene & Viviano 2006:154). For instance, some countries accept the mere scanning of newspapers for job advertisement as an effort to find employment, whereas others insist that a job seeker needs to go beyond that and formally process a job application (ILO 2016:5). Therefore, in relation to length of time, the ILO subscribes to four weeks as a benchmark beyond which a person is considered discouraged and is moved out of the strict view definition of unemployment. In the same breadth, Statistics SA aligns the country to the ILO benchmark and has also adopted the four weeks period.

From the aforesaid, it becomes evident that the expanded view of unemployment encompasses all persons who are of working age and desire to be employed but are not, irrespective of whether such persons have been actively seeking employment or not. In the final analysis, South African authorities use the strict definition of unemployment to determine the official unemployment rate of the country, but also often disclose what the expanded rate is for the reporting period.

An important and widely used measurement in the labour market is the unemployment rate. The unemployment rate is simply a reflection of “the labour force that does not have a job but is available and looking for work” (ILO 2016:2). This measurement is flawed in that it excludes discouraged workers. Brandolini, Cipollene & Viviano (2006:154) recognize that discouraged work seekers may not be actively looking for work out of discouragement, but are definitely available, usually immediately, to start working where work is available. Therefore, the use of the labour force as a denominator in determining the unemployment rate can be misleading as it leaves out this cohort of people.

While it is significant, it must be noted that the use of the unemployment rate as a measurement tool can also be limited. Firstly, the unemployment rate does not speak to the type of unemployment, and whether such unemployment is decent work, long-term and structural or seasonal and short-term (ILO 2016:2). Secondly, this measurement may not necessarily be useful in making comparison between countries. This is because variances between countries may occur depending on factors concerning measurement differences (such as the age range used by a country), geographic coverage, frequency of observation, and the collection methodology (ILO 2016:6-7). In spite of the aforesaid, the unemployment rate overall still remains widely used to measure a country’s utilization of its available labour supply (ILO 2016:1).

#### 5.2.4 POVERTY

The concept of poverty is better described than defined (UNDP 2006:4). Even the South African government has not attempted to define poverty (NPC 2011:3). In an effort to do justice to the concept, the United Nations Development Programme (UNDP) (UNDP 2006:5) offers a comprehensive description of poverty:

People can be said to be in poverty when they are deprived of income and other resources needed to obtain conditions of life – the diets, material goods, amenities, standards and services – that enable them to play the roles, meet obligations and participate in the relationships and customs of their society.

Accordingly, Archbishop Emiritus Ndungane had this to say about the phenomenon:

9Poverty can be defined in terms of income, in terms of the loss of human dignity and in new human suffering. There is also poverty in terms of denial of access to opportunities for advancement. Poverty has also been described as being found in those whom progress has pushed to the periphery (ESSET 2002:56)

Similarly, Cloete (2015:516) recognizes a perspective that believes that poverty is a product of power dynamics and human relationships. As a result, the powerful have the advantage of determining who shares in the benefits of and access to resources, while at the same time dictating who to exclude. He also asserts that “poverty is not only about a lack of access to basic services, but of being excluded from the interaction, decision-making process and, most of all, the exchange of goods in economic processes” (Cloete 2015:516).

Consequently, this study will also refrain from offering a definition of poverty, but describes it as a condition where an individual’s income is insufficient to meet that individual’s essential needs that are necessary for survival (Jansen *et al* 2015:151).

Because the concept of poverty is one that is not easily definable, it has to include the living experiences of the poor for it to be meaningful. However, there seems to have emerged consensus on the characteristics of poverty, and these can be related to a poverty baseline. Therefore, by definition, a person who lives below a poverty baseline is classified as being poor (Chibba & Luiz, 2011:308).

Following from the descriptions above, poverty can be categorized into extreme and relative poverty (Jansen *et al* 2015:151). From a global perspective, extreme poverty is generally associated with persons who live below the extreme poverty line (UNDP 2006:5).

Accordingly, the UNDP has set latest poverty line at \$1.90 per day<sup>49</sup>. It should be noted that the phrases extreme poverty and abject poverty are synonymous. On the other hand, relative poverty refers to poverty that is dependent on contexts and situations (Jansen *et al* 2015:152). Accordingly, a person may be regarded as poor because their income is less than the average income in a given context. For instance, a person who is deemed rich in the township may be considered poor in the city, and vice versa (UNDP 2006:5).

It is unsettling that South Africa does not have one range of poverty lines. Statistics SA, National Treasury and the National Planning Commission each have their own poverty lines that are different from each other (Gumede 2021:185). This is not helpful in measuring poverty consistently across government departments. Whatever measurement is agreed upon, should fully capture the voices of the poor.

In recognition of the seriousness of poverty, the United Nations Millennium Summit of September 2000 resolved to develop what has come to be known as the Millennium Development Goals (MDGs) which had a fifteen-year lifespan. The MDGs were eight development goals which were sponsored by the United Nations (UN) and adopted by 189 countries (including South Africa) whose focus was on meeting the needs of the poorest people of the world by 2015. As a country that aligned itself with the MDGs, South Africa established the National Planning Commission (NPC) in May 2010 to craft strategies that are local context specific. The NPC issued a diagnostic report in June 2011 and a draft National Development Plan (NDP) was published in November 2011. The significance of the NDP is that it embedded the objectives of the MDGs. The NDP recognized that as of 2011 “about 60 percent of the population live[d] in urban areas and slightly more than half of the poor live[d] in cities” (NPC 2011:7). In this way, the NDP could locate where the poor lived, so as to target relief to these areas.

Overall, the MDGs achieved some significant successes, including having halved the number of people living in extreme poverty in the world, even while they were not successful in many others (World Bank 2015). It was however noted that, while some regions were

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<sup>49</sup> The World Bank has kept the extreme poverty line at \$1,90 since 2015

reporting reduction in poverty, sub-Saharan Africa was lagging behind in this important task and the level of poverty was not on the decline in the region (Barros & Gupta 2017:20, World Bank 2015). Significantly, the World Bank report projected that, in this region, the goal of halving poverty between 2000 and 2015 would not be achieved (Barros & Gupta 2017:20, World Bank 2015). Initially in South Africa, between the years 2000 and 2015 there was a significant reduction in extreme poverty from an extreme poverty rate of 70.2% in 2000 to a level of 25.2% in 2015, representing a 45% drop. This reduction can mainly be attributed to the rollout of government grants.

Failure to achieve some of the MDGs necessitated the formulation of a new plan. This came in the form of seventeen targets that were conceptualized as the Sustainable Development Goals (SDGs.) with a target date of 2030 and assented to by 193 UN member states (Tomalin, Haustein & Kidy 2019:102). While one of the shortcomings of the MDGs was lack of consultation in the formulation process, “the SDGs were arrived following a wide-reaching negotiation process within the UN as well as what was claimed to be the largest civil society consultation ever held in history” (Tomalin, Haustein & Kidy 2019:102).

One significant contribution of the SDG is the acknowledgement that far too many people are left on the periphery of the economy, and that the global, regional and local economies have excluded many of their citizens. A commitment was then made that “no one was to be left behind”. Notably, the essence of this message is being carried through in the fight against COVID-19, with a similar ‘all embracing’ posture that “No one is safe, until everyone is safe” (DESA 2020). Unfortunately, extreme poverty is largely common place in Sub-Saharan Africa, with more than forty percent of the region’s people living in extreme poverty, i.e. living under \$1,90<sup>50</sup> per day.

In the South African context, extreme poverty is currently denoted by the food poverty line of R624 per person per month (as of April 2021), which represents the amount of money needed by an individual to afford the minimum daily energy intake (StatsSA 2021d:3, StatsSA 2021b). The food poverty line is a threshold below which people cannot afford to feed themselves and are then regarded as being in extreme poverty. The second measurement is the lower-bound poverty line (LBPL) currently at R890 (in April 2021). The third measurement is the upper-bound poverty line (UBPL), which is currently at R1,335 per

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<sup>50</sup> The World Bank has kept the extreme poverty line at \$1,90 since 2015

person per month (in April 2021). The UBPL “refers to the food poverty line plus the average amount derived from non-food items of households whose food expenditure is equal to the food poverty line” (StatsSA 2021d:3). Essentially, a person who lives above the UBPL should be able to meet basic needs, such as food, cost of schooling, transport costs, access to health and essential services *etc.* Thus, the UBPL is the last line before one enters a state of poverty. Whereas food poverty line refers to extreme poverty, the upper-bound poverty line refers to relative poverty (StatsSA 2021d:3). Correctly understood, the lower and upper bound poverty lines represent a range of possible poverty lines in South Africa (StatsSA 2008:14). The study appreciates, from the onset, that very little information regarding the pre-democracy levels of poverty is available.

The apartheid state made all efforts to hide the existence of poverty especially, among the black majority, that it is not possible to establish levels of poverty prior to the 1990s (Seekings & Nattrass 2005).

### 5.2.5 INEQUALITY

Inequality can be defined as a state of disparity that allows an individual certain choices whilst denying another similar choices. By extension, economic inequality relates to material choices. In a similar manner, the Concepts of Inequality document of the Development Strategy and Policy Analysis Unit of the United Nations, defines inequality as “the state of not being equal, especially in status, rights, and opportunities” (UN 2015)<sup>51</sup>.

Historically, apartheid in South Africa has left a huge legacy of inequalities in the country, especially the inequality that prevails between persons of different races (Chibba & Luiz, 2011:307). This legacy is central in maintaining economic inequality on the basis of race. Be that as it may, inequality “has worsened over the last few decades in almost all developing countries, no less in post-apartheid South Africa. Moreover, the recent global financial and economic crisis – the dual crisis [of 2007-2009] – has exacerbated this core development problem” (Chibba & Luiz, 2011:307). It has also become evident that strategies implemented

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<sup>51</sup> Concepts of Inequality - the United Nations available online at [https://www.un.org/policy/wess/dsp\\_policy\\_01](https://www.un.org/policy/wess/dsp_policy_01) [Accessed on 15 January 2021]



by respective democratic governments have largely not impacted in any meaningful manner in the fight against inequality (Chibba & Luiz, 2011:308).

The NDP sums up the strategy that must be employed to achieve its goals when it surmises: “to eliminate poverty and reduce inequality, the economy must become more inclusive and grow faster. These are the twin imperatives” (NPC 2011:10).

While South Africa is a leader in this shameful status, it has also long been recognized that inequality is a global phenomenon which may be noticed between countries and within a country (Katiyatiya 2019:203). It is for this reason that the SDG’s have concerned themselves with reducing gender inequality (goal five) and reducing inequality among and within countries (goal ten)<sup>52</sup>.

Whilst the existence of various types of inequality is acknowledged, the focus of this paper is on economic inequality, which predominantly assumes two forms, viz. wealth and income inequality. It must be noted that a person’s wealth is represented by that person’s accumulated riches less debts (Ward & Himes 2014:119).

Graafland (2022:1) argues that the last few decades have seen an increase in levels of income and wealth inequality in both developing and developed economies, eroding confidence about just distributive capabilities of these economies. Economic inequality in South Africa has remained stubbornly high and has political implications (Gumede 2021:184). Ward and Himes (2014:121) argue that economic inequality, in its extreme form, leads to plutocracy. The authors borrow a definition by Francis Fukuyama who defines plutocracy as “the rule by the rich and *for* the rich” (Ward & Himes 2014:121). Accordingly, Fukuyama views plutocracy as “a state of affairs in which the rich influence government in such a way as to protect and expand their own wealth and influence, often at the expense of others” (Ward & Himes 2014:121). Even contemporary economists acknowledge “that concentrations of income and wealth among the highest earners bring a variety of problems” (Ward & Himes 2014:118).

One of the targets of the MDGs was the promotion of gender equality, however, Dodds, Donoghue & Kidy (2016) observed that some MDG indicators turned out to be less

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<sup>52</sup> Sustainable Development Goals, Available on the UN website, <https://sdgs.un.org/goals> [Accessed on 30 November 2020]

appropriate at reducing inequality. Evidently, this goal has been carried into the SDGs as goal number five, and together with SDG number ten (reduction of inequality within and among countries) give effect to a concerted effort to deal a blow to inequality in all its manifestations. The transition from MDGs to SDGs confirms the paradigm shift from a focus on economic growth to one on quality economic growth (Barros & Gupta 2017:20).

Although other measures of economic inequality, such as the Theil index and the Atkinson index, are in use, this study will focus its analysis of economic inequality on the Gini coefficient. The Gini coefficient is a widely used measures for calculating inequality of income and wealth distribution and is a ratio with a value between 0 and 1. In this ratio, 0 is representative of absolute equality and conversely, 1 perfect inequality (Jahan 2002:5).

On the relationship between inequality and poverty, Chibba & Luiz, (2011:311) contend that wages account for two-thirds of inequality, and that almost half of this inequality is pushed by households without any income. Households without any income are generally poor households. In addition, it can be observed that the highest levels of inequality coupled with worst unemployment levels obtain in places where poverty is highest (Chibba & Luiz, 2011:311). This reveals a positive relationship between poverty and inequality, as well as an inverse relationship between poverty and inequality on one hand and unemployment on the other (Chibba & Luiz, 2011:311). Evidently, employment is a dominant source of reduction in both poverty and inequality as also observed by Barros and Gupta (2017:29).

We have already mentioned earlier that South Africa experienced periods of economic growth that failed to create jobs and reduce poverty and inequality. While there exists established literature that lends credence to the view that the GDP growth generally leads to reduction in poverty and unemployment, Sub-Saharan Africa, and in particular, South Africa, revealed a different story – one of economic growth that did not support poverty reduction (Barros & Gupta 2017:20). Barros & Gupta (2017:20) further make a point that inequality has a far greater impact on poverty more than the way economic growth has an impact on poverty. So it was wise for South African authorities to consider working on reducing economic inequality while at the same time stimulating job creating economic performance (NPC 2011:26).

Since extreme poverty is a critical problem in South Africa, as it is in most developing economies, special focus should be placed on the measurement of the extreme poverty line (StatsSA 2008:9).

The last three subsections of this section, including this one, sought to help define and describe the concepts of unemployment, poverty and inequality. The objective was to create a conceptual understanding of these concepts and locate them within a South African context.

The study now moves to analyse the levels of unemployment, poverty and inequality in contemporary South Africa. This analysis will be delineated into the Pre-Covid-19 Pandemic contemporary context (2012-2019) and Post-Covid-19 pandemic contemporary context (2020-2021). Each of the social ills of unemployment, poverty and inequality will be considered in these contexts.

The study has successfully outlined the conceptual framework of unemployment, poverty and inequality and now moves to consider the actual situation of the three social ills in Pre-COVID-19 contemporary South African contexts for the period 01 January 2012 to 31 December 2019. The aim is to analyse this context as it prevailed before the advent of the pandemic.

### **5.3 PRE-COVID-19 PANDEMIC CONTEMPORARY CONTEXT: 2006 - 2019**

#### **5.3.1 Unemployment**

Various Quarterly Labour Force Surveys (QLFS) (StatsSA 2021a, 2019a, 2015:viii, 2011) consulted are instructive in that they consistently reveal that during these pre-Covid-19 years, irrespective of gender, the white and Indian/Asian population groups lead employment in skilled positions relative to the black African and coloured population groups. In relation to men, black Africans and coloured populations groups are disproportionately dominant in the semi-skilled category of occupations. Similarly, black African women have a relatively larger share of occupations in the low-skilled category revealing their relative labour market vulnerability.

The official unemployment rate for the fourth quarter of 2019 stood at 29.1% while the expanded rate was recorded at 38.7% (StatsSA 2019a:1). These numbers reveal an upward

trend from the start of this study's contemporary period (Dec 2011) where the official unemployment rate stood at 23.8% and expanded rate at 35.4% (StatsSA 2011).

The unemployment rate of "African women in low-skilled occupations was 43,9% compared to 1,1% of white women and 2,3% of Indian/Asian women in 2015. Conversely, the same source, the Q2:2015 QLFS, reveals that about 56,2% of white women were employed in skilled occupations compared to only 17,5% of black African women and 19,6% of coloured women" (StatsSA 2015:ix).

The unemployment rate gap between men and women had peaked at a level of 4.7% in Q4:2011 (StatsSA 2011:xv). In Q4:2019, this difference had reached a level of 4.1%. A further analysis of the employment statistics reveals that in Q4:2019 unemployment figures for women had reached a rate of 31.3% compared to 27.2% for men (StatsSA 2019a).

This state of affairs can also be noticed even among young persons. For the same period the unemployment rate for young women stood at 43.9% as compared to 36.4% for young men (StatsSA 2019a). For all persons under the age of thirty-five, the unemployment rate in 2019 stood at 57.5%. Furthermore, The Q4:2015 QLFS (StatsSA 2015:xii-xiii) estimates that 60.9% of the labour force in the country does not have a matric qualification, 26.7% have a matric qualification. Of those with a matric qualification, 7.1% have other tertiary qualifications while 4.4% are graduates. "Among employed, the proportion of those with less than a matric education for men was 49,1% and 43,6% for women in 2015. The employment shares for women with matric, other tertiary and tertiary were higher than those of men in the same educational categories for both 2008 and 2015" (StatsSA 2015: xiv). In contrast to those without matric, women with matric or higher qualifications have better chances of being employed than their male counterparts.

The above results corroborate the notion that black people, women, young people and people without tertiary qualification remain vulnerable groups in the labour market. Cloete (2015:515) contends that employment has dropped because of relative decrease in demand for unskilled labour, and consequent increase in demand for skilled labour. Furthermore, Cloete (2015:515) also notes that graduate employment is under pressure, with increasing signs of increased unemployment even in that cohort.

### 5.3.2 Poverty

The United Nations estimates that before the COVID-19 pandemic, about 10 percent of the world population was living in conditions of extreme poverty, struggling to meet the most basic of needs like access to food, water and sanitation, education, health, and many other basic needs<sup>53</sup>.

Sadly, there is an unfortunate dearth of updated poverty data in South Africa, especially since Statistics South Africa (the official statistical agency of the SA government) has not undertaken a poverty survey after 2015. Consequently, this has not been helpful in analysing poverty dynamics in the country since 2015 (Gumede 2021:184).

However, the World Bank (2020b:1) supports the view that since the democratization of South Africa, significant progress in reducing poverty has been made, and also that this trajectory of reduction in poverty was unfortunately reversed between 2011 and 2015.

Poverty remains pervasive in South Africa and dangerously interconnected to unemployment and inequality. Affirming an earlier assertion about the interconnecteness of the three social ills, Chibba & Luiz, (2011:311) contend that “wage income contributes about 67 per cent of inequality, and almost half of this is driven by households with no wage income” and also that “the provinces [in South Africa] with the highest levels of poverty also have the highest inequality and the worst unemployment” (Chibba & Luiz, 2011:311). Unfortunately, children and the youth account for more than two-thirds of the poor.

Table 1: Poverty Levels in South Africa

	<u>2006</u>	<u>2011</u>	<u>2015</u>
Upper-Base Poverty Line	66,60%	53,20%	55,50%
Lower-Base Poverty Line	51,00%	36,40%	40,00%
Extreme Poverty Line	28,40%	21,40%	25,20%

Source: Statistics SA (2020b) - Poverty Mapping Overview

Looking at the table above, it is evident that StatsSA (2020a:8) records that an estimated 21.4% of the population lived in extreme poverty in 2011, an improvement from a level of

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<sup>53</sup> UN - Ending Poverty [Accessed on 28 December 2021 from <https://www.un.org/en/global-issues/ending-poverty>]

28.4% in 2006. By 2015, this situation had again deteriorated to a level where more than one in four persons (25,2% of the population or 13,8 million people) lived in conditions of extreme poverty (StatsSA 2020a:7-8). However, even if these figures represent an improvement, consideration should be had that there was initially an uneven trajectory which peaked in 2009 when 16.9 million people were living in extreme poverty (StatsSA 2020a:8).

In relation to the upper-bound poverty line, between 2006 and 2011 the rate of the South African population that lived in poverty (below the UBPL) reduced from 66.6% in 2006, to 62.1% in 2009, before increasing to 53.2% in 2011. This rate then stagnated for a while before increasing to 55.5% in 2015 (StatsSA 2020a:8). It is noticeable that both measures of poverty reveal poverty rates that dropped from 2006 to 2011, and then started rising steadily again after 2011. These statistics show that the poverty situation in South Africa had been gradually decreasing since 2006. Unfortunately, for reasons already mentioned earlier in this section, this study is unable to establish the poverty trend between 2015 and 2019, and indeed generally beyond 2015.

To place the above statistics in context, it is estimated that four million people experience multi-dimensional poverty, which can be described as a combined state of any of poor health, lack of clean water, malnutrition, inadequate access to healthcare services and inadequate housing conditions.

The elderly – those above 65 years – experienced the greatest reduction in money metric poverty between 2006 (49.5%) and 2015 (at 30,1%) with children's money metric poverty reduction coming in second over the same period, (51% in 2015 from 62.8% in 2006). This represents a decline of 19.3% for the elderly and 11.8% for children (StatsSA 2020b:11-12). This is testament to the reach of social grants implemented by government and concerted efforts especially by the Thabo Mbeki administration to include all those eligible in the social grant system.

Table 2: Poverty by Gender

	<u>2006</u>	<u>2011</u>	<u>2015</u>
Male	26,50%	20,20%	23,70%
Female	30,10%	22,60%	26,50%

Source: Statistics SA (2017)

Table 2 above reveals that even as poverty was being reduced between 2006 and 2015, women continued to be more vulnerable to poverty than men as their levels of poverty remained relatively higher during all periods reviewed. According to the UNDP (2014), one of the primary reasons for this state of affairs is the unequal wage gap between women and men to the disadvantage of women. Furthermore, there is generally a higher unemployment rate attributed to women than to men. For Gumede (2021:183), this is evidence for *feminisation of poverty* as relatively more women are in a state of poverty than their male counterparts.

### 5.3.3 Inequality

As alluded to above, racial inequality in South Africa is a legacy of over 350 years of colonialism and the apartheid dispensation of the latter half of the twentieth century (Gumede 2021:184). Income inequality is glaring between races with whites earning substantially more than Africans, Coloureds and Indians for the same job category (StatsSA 2021e:32-33).

One of the strategies adopted by the NDP was to categorize the reduction of inequality, initially in alignment with MDGs and subsequently with SDGs 5 and 10, as some of its priorities (NPC 2011:26). As alluded to in an earlier section, South Africa's Gini co-efficient was recorded at 0.7 in 2011 and was targeted to be reduced to a level to 0.6 by the year 2030 (NPC 2011:3, StatsSA 2019b:26). At a Gini co-efficient of 0.7 in 2011, South Africa was the most unequal society in the world.

While it may be true that the racial income inequality gap in the country may have been on the decline since 1994, it is predominantly the black elite and politically connected that enjoy the fruits of the democratization process. Unfortunately, for the majority of the black poor, this gap has but just been worsening (World Bank). Lamb refers to the 2011 World Bank Report (*World Development Indicators*) and noted that in 2011 the country had a Gini Coefficient of 0.65 "with the poorest 60% of the South African population only generating 14.5% of total national income, while the wealthiest 10% generate 53.8%" (2019:365).

#### 5.4 POST-COVID-19 PANDEMIC CONTEMPORARY CONTEXT: 2019 – 2021

The South African economy continues to be the most advanced economy on the African continent (Odhiambo 2015:393). The country has established solid economic fundamentals, sound financial systems and a world class stock exchange, unmatched by no other on the continent. Together with the economies of Nigeria and Egypt, the economy of the country has consistently been in the top three on the continent for many consecutive years. A 2020 World Bank Report reveals that Nigeria remains the biggest economy on the continent with a Gross Domestic Product (GDP) of \$432.3 billion, Egypt, at second place has a GDP of \$363.1 billion and South Africa is ranked third with a GDP of \$301.9 billion (World Bank 2020)<sup>54</sup>. Additionally, South Africa is regarded highly as “one of the upper-middle income economies in the world” (Chirwa & Odhiambo 2015:10).

The COVID-19 pandemic has affected virtually all world economies and created a massive fallout that affected levels of employment, poverty and equality (ILO 2021c:7). Recent surveys revealed that the South African economy contracted by 7% in 2020, with a projected growth of 2,50% in 2021 (SARB 2021, StatsSA 2021b). Naturally, this has led to increased levels of unemployment and poverty, and the vulnerable and poor bore the brunt of this fallout from the pandemic, with “early evidence suggesting disproportionate gender impacts” (World Bank 2021:13).

Prior to the onset of the COVID-19 pandemic, the South African economy was already in a technical recession after experiencing two successive quarters of negative growth during the third and fourth quarters of 2019 (StatsSA 2020a:2). By June 2020, the economy was in a severe recession, following further negative economic growths in the first two quarters of 2020. The annualized growth rate reached -51% by June 2020 mostly as a result of the impact of the COVID-19 pandemic and the hard lockdown that the country was placed under (StatsSA 2019b; StatsSA 2020a). This was recorded as the longest recession in 28 years (StatsSA 2019b; StatsSA 2020a). Naturally, the economic impact of the COVID-19 pandemic was felt by virtually all South Africans, as most economic activities were halted for five weeks during the hard lockdown of March – April 2020 (Bhorat *et al* 2020:3). Subsequent months saw the easing of the lockdown situation but supply and demand of goods and

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<sup>54</sup> World Bank 2020. World Development Indicators <https://datatopics.worldbank.org/world-development-indicators/themes> [Accessed on 28 October 2021].



services continued to be subdued. Annualized GDP rebounded in the 3<sup>rd</sup> quarter of 2020 and closed the year at a rate of 6.3% (StatsSA 2020a:2). By Q4 2021, the annualized GDP growth rate had settled at 4.9% (StatsSA 2021f)<sup>55</sup>.

In an effort to address the effects of COVID-19 on the economy, governments worldwide have been sponsoring economic stimulus packages to stimulate their respective economies and the South African government is no exception. In April 2020, the South African government announced a stimulus package which “included substantial additional spending, targeted at firms and individuals, that amounted to 6,5 percent of GDP” (Bhorat *et al* 2020:5). The adopted measures have been hailed as progressive, even as they placed increased pressure on an already fragile fiscus, with early predictions that the budget deficit may double (Bhorat *et al* 2020:5). Currently, uncertainties abound as the country, and indeed the world, navigates the pandemic economically and socially.

While the country was gripped by the pandemic, July 2021 saw the unleashing of civil unrest that was unprecedented in the democratic era (Erasmus, *Daily Maverick* 2022). It is not the intention of this study to delve into the set of complex reasons for or against the unrest, suffice to say that ground was fertile for such social unrest to take place because of the state’s failure to deliver social services to the public. With unemployment figures at a record high, inequality on the increase, poverty not abating, and corruption and crass consumption by the elites and politically connected glaringly obvious, the stage was set. The social cohesion of the South African society had been increasingly compromised during the past decade. For eight days in July of 2021, rioters looted shops and businesses, and ransacked warehouses disrupting the value chain. The sad news is that the unrests are recorded to have claimed the lives of more than 350 people (Erasmus, *Daily Maverick* 2022). Furthermore, it is believed that the cost to the economy is estimated at more than fifty billion rand (Africa, Gumbi & Sokupa 2021:12). It is also estimated that at least R141million of those damages were attributed to school properties alone<sup>56</sup>.

It shall be recalled from chapter four that, following Lenin’s wisdom, at least three conditions needed to be present for a successful social revolution to take place (Itzkin and Halévy 1975:50). The first is the existence of an obsolete and/or corrupt political system. Such a

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<sup>55</sup>Key findings: P0441 - Gross Domestic Product (GDP), 4th Quarter 2021, available on [https://www.statssa.gov.za/?page\\_id=1856&PPN=P0441&SCH=72934](https://www.statssa.gov.za/?page_id=1856&PPN=P0441&SCH=72934) [Accessed on 01 June 2022]

<sup>56</sup>Parliamentary Monitoring Group <https://pmg.org.za/committee-meeting/33334/> [Accessed on 01 June 2022]

condition had been present in South Africa for a while. For instance, disturbing evidence of corrupt practices and repurposing of the state were revealed at the Judicial Commission of Inquiry into Allegations of State Capture, commonly known as the Zondo Commission, which were broadcast live on television for all to see, bear testimony to this<sup>57</sup>.

The second condition, which was also present, is a crisis in the affairs of the ruling elite, as can be evidenced by factionalism in the ruling party, the African National Congress (ANC) (Africa, Gumbi & Sokupa 2021:4). However, just like in the failed English Revolution, the third condition was absent, viz. there was a dearth of a group of experienced revolutionaries who could sustain the revolutionary movement. While there may have been a group that fuelled the unrests, we saw in the media how communities together with other organized civil society bodies, such as the taxi associations soon came to the realization of the potential long-term impacts to their own survival from the riots, and harm of their personal and community interests<sup>58</sup>. We saw how they began to play a leading role in defending business properties, especially malls located in the townships. It was encouraging to see on social media as some instigators were being publicly humiliated and forced to retract their calls for economic shut-down.

It must be remembered that the English Revolution failed primarily because of lack of the last two conditions. Significantly, Methodism had become the antidote of Jacobism and by extension, for the revolution (Itzkin and Halévy 1975:53). It is unfortunate that as the July 2021 unrests unfolded, religion in general, and Methodism in particular, failed to become a factor of positive influence. Was the church overwhelmed by these events of the eight days in July? Specifically, could it be that Methodism has lost the fervour that permeates society, and which acts as a force for good, revealing the power of the gospel to renew and transform society? Afterall, the mission of the Methodist Church of Southern Africa is “A Christ-healed Africa for the healing of Nations” (MCSA Yearbook 2021).

Having explored the micro economic context, we now focus our attention onto the social ills themselves.

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<sup>57</sup> Judicial Commission of Enquiry into State Capture report - part 1, available online at <https://www.gov.za/documents/judicial-commission-enquiry-state-capture-report-part-1-4-jan-2022-0000>

<sup>58</sup> BBC News: South Africa riots: The community standing up to looters, 15 July 2021

### 5.4.1 Unemployment

As alluded to earlier in this section, the pandemic has hindered economic growth and adversely affected employment levels. To make the point, the ILO (2021:9) records that the annual global unemployment rate for 2020 increased by 1.1% to 6.5%. In the same year, a net loss of 8.8% of global working hours compared to the fourth quarter of 2019 was recorded. This loss is an equivalent of 255 million full time jobs, with the loss assuming various forms such as job losses and reduction in working hours (ILO 2021:1-2). To understand the extent of this unprecedented scale of loss and place it in a proper context, it is worth noting that the loss is “approximately four times greater than that of the global financial crisis” of 2009 (ILO 2021:5).

Predictably, it is women and young workers who remain vulnerable groups during health pandemics. Across all sectors and regions, women suffered employment losses of 5% whereas the employment loss for men was 3.9%, and young workers suffered losses of 8.7% compared to older workers who lost 3.7% (ILO 2021:9-10). In view of these losses, it is the view of the ILO that employment levels around the world remain below those recorded pre-pandemic (IMF 2021:7).

As mentioned several times already, and like other world economies, the South African economy has been heavily battered by the COVID-19 pandemic and the sustained lockdown has placed virtually every citizen under extreme economic pressure (Bhorat *et al* 2020:4). Employment has been affected as hours of work, and invariably income, were reduced and with many people losing their jobs (Bhorat *et al* 2020:4). While economic indicators tell of performances that were already unfavourable prior to the emergence of the novel coronavirus, the pandemic has revealed some serious fault lines in the economy. Just before the emergence of the pandemic, unemployment in South Africa stood at 29,1% (StatsSA 2021c). This level reveals a significant increase from the 25% levels at which the unemployment rate had been recorded up to around 2015 (StatsSA 2021c). Also, for the twelve years ending 2019, the rate had been fluctuating between 20% and 30% range, bridging the 30% level only in 2020, presumably fuelled by the pandemic (StatsSA 2021c).

It is estimated that as of 31 December 2021, South Africa had 39,8 million people who were of working age – that is between the ages of fifteen and sixty-four (StatsSA 2021e:6). An estimated 22,4 million of these people were economically active, while 17.4 million persons

were not economically active (NEA) (StatsSA 2021e:6). This translates into an absorption rate of 36.5% (StatsSA 2021e:6). Using the strict definition, the official unemployment rate increased by 0.4% from the third quarter of 2021 to reach a level of 35,3% in the fourth quarter of 2021, which translates to a reality that 7.9 million people were unemployed as at 31 December 2021 (StatsSA 2021e:6).

Unemployment in South Africa, like in most other developing nations, is relatively high (Chitiga *et. al.* 2021:1628, Odhiambo, 2015:395, ILO 2016). As already alluded to earlier, StatsSA (2021c) noted that the rate of unemployment in the country has consistently been around 25% for the decade until 2015 and begun steadily rising thereafter. This supports the view that the unemployment rate had already been on the upward trend before the big shock of the pandemic. Table 3 below, which has been extracted from StatsSA's QLFS Trends 2008-2021 Q2, reveals that this rate was 23,8% in Q4:2011, rising to 29.1% just before the advent of COVID-19 in Q4:2019, and reaching a level of 34.4% in Q2:2021 and closing the year at 35.3% in Q4:2021.

A summary of both the official and expanded rates of unemployment are recorded in the table below:

	<u><b>Q4:2011</b></u>	<u><b>Q4:2019</b></u>	<u><b>Q2:2021</b></u>	<u><b>Q4: 2021</b></u>
<b>Official Rate</b>	<b>23.8%</b>	<b>29.1%</b>	<b>34.4%</b>	<b>35.3%</b>
<b>Expanded Rate</b>	<b>35,4%</b>	<b>38,7%</b>	<b>44.4%</b>	<b>46.2%</b>

Table 3: Trends in levels of the unemployment rate (StatsSA 2021c & e)

Using the expanded definition lens, 11,9 million people of working age remained without work as at 30 June 2021 (StatsSA 2021a). Using the official rate this number is 7.8 million people as at the same period (StatsSA 2021a).

Looking at employment in the formal non-agricultural sector, 10,2 million people employed in that sector at Q2:2021 represents almost the same level of employment in that sector ten years earlier – in Q4:2011. So, whatever employment gains were made during the almost ten-year period since Dec 2011 in the formal non-agricultural sector, were wiped out by the time of the advent of the COVID-19 pandemic.

Throughout the periods reviewed, the rate of unemployment was consistently higher among women than it was among men (ILO 2016:3). StatsSA (2021a) supports this view:

“According to the Quarterly Labour Force Survey of the 2nd quarter of 2021, the South African labour market is more favourable to men than it is to women”. To illustrate the point, as of Q4:2021, official unemployment rate among women stood at 38.2% which was 5.4% higher than that among men – men’s unemployment rate stood at 32.8% (StatsSA 2021e:30-31). This further confirms the belief that the pandemic had a greater negative impact on women employment than it did to employment of men. Chitiga *et. al.* (2021:1628) observes that “while South Africa has very high unemployment and poverty, these are particularly higher for women than for men”. This anomaly can also be observed where unemployment among young women tends to be higher than it is for young men (ILO 2021c:3). Youth unemployment rate, the unemployment rate for persons between the ages of fifteen and twenty-four years, stood at 74,8% for Q2:2021, a rate which is more than double the official national unemployment rate of 34,4% in Q2:2021. Comparative figures for Q4:2019 show a rate of 40.1%, signifying a substantial jump between the two interval points (StatsSA 2021c). Globally, economic sectors that traditionally provide employment for young people have been sectors such as tourism, retail, and customer services (ILO 2021c:7). Sadly, these are also sectors that were hit hardest by the lockdowns imposed in response to the pandemic. According to the ILO (2021c), youth unemployment before the pandemic was estimated at around three times higher than that of adults and has worsened during the pandemic.

Data analysed reveals that the job market still largely remains skewed in favour of white workers, who disproportionately occupy skilled occupations, and consequently earn more than their counterparts of people of colour. Africans, Coloureds and Indians occupy less privileged positions compared to white workers (StatsSA 2021e:32-33). For Q4:2021, unemployment stands at 39.1% for Blacks, 29.8% for Coloured, 27.5% for Indians and a low 8.8% for Whites (StatsSA 2021e:32-33).

Global trends reveal that the two sectors that experienced subdued employment losses were those of information technology & communication sector, and financial and insurance services sector. These sectors recorded employment growth from the second quarter of 2020 onwards, with employment growth of 5% for the information and communication sector and 3.4% for the financial and insurance sector in Q2:2020 (ILO 2021:12). Additionally, because of the nature of their activities, employees in these sectors could easily transition from office

based to remote working environments. Both these sectors are generally staffed by employees with high levels of educational qualifications. It can be inferred that those workers with higher educational qualifications were better cushioned against the adverse effects of the pandemic and job losses relative to those with lower qualifications.

A point has already been made that unemployment in South Africa “is largely structural in nature” (Odhiambo, 2015:395). To attest to this, statistics show that the rate of unemployment among university graduates is lower (1.9% in Q4:2019 and 2.4% in Q4:2021) than that among all other levels of educational qualifications, irrespective of age, and is highest among persons with qualifications lower than a matric at 55.9% in Q4:2019 and 51,6% in Q4:2021 (StatsSA 2019a:7, 2021e:7).

In the final analysis, Blacks, women and young people remain a vulnerable cohort of the labour force and were hardest hit by the effects of the pandemic, as the rate of unemployment in those groups increased relatively higher than it did for their counterparts.

#### **5.4.2 Poverty**

The legacy of apartheid colonialism can be felt most severely in the area of poverty. It has already been noted in section 5.2.5 that apartheid South Africa left a huge legacy of underdevelopment and poverty, which threatened social cohesion (NPC 2011:4). In its overview section, the NDP noted that “persistently high levels of poverty will prompt social instability, leading to a rise of populist politics and demands for short-term measures that lead to further tension and decline” (NPC 2011:4). Evidently, as early as in 1994, the RDP policy acknowledged that for a political economy to survive, poverty and deprivation must be prioritised and attacked (NPC 2011:1). Sen and Foster (1997:1) contend that there exists a relationship between inequality and rebellion. It would thus not be far-fetched to postulate that the July 2021 unrest in parts of Kwazulu Natal and Gauteng, South Africa, could have been fuelled by the prevalence of poverty and inequality, among other political and social factors.

COVID-19 has affected the poor and the vulnerable most acutely, with early evidence available suggesting a disproportionately greater impact on women than on men (IMF 2021:13). For 2020, the IMF (2021:21) was projecting the fallout from the pandemic to

possibly push more than 80 million more people globally into extreme poverty by the end of that year. According to the World Bank (2021), prior to the pandemic, extreme poverty had been on a gradual decline for 25 consecutive years, but the quest to end extreme poverty suffered its worst setback in a generation largely due to the pandemic, climate change and conflicts. Consequently “[t]he increase in extreme poverty from 2019 to 2020 is projected to be larger than any time since the World Bank started tracking poverty globally in a consistent manner” (World Bank 2021). While efforts made to achieve the Sustainable Development Goals were easing the plight of the poor, the emergence of the pandemic reversed most of these gains (World Bank 2021, UNDP 2020).

Notably, it remains disturbing that South Africa’s white population continues to generally enjoy living standards that are at par with those enjoyed by citizens of the first world (Western Europe and North America), while the poorest one-fifth, made up predominantly of Africans and Coloured, experience living standards which are similar to those experienced by citizens of the world’s poorest countries (Gumede 2021:195). Black people remain the racial group most affected by poverty (StatsSA 2020b; Jansen *et al* 2015:151). Also, it has become evident that poverty levels are generally higher among women than they are for men (Chitiga *et. al.* 2021:1628).

StatsSA (2020b:41), surmises that there exists an irrefutable relationship between poverty and education. In this scenario, the higher an education qualification a person possesses, the less likely are they to be vulnerable to living in poverty. It is for this reason that the NDP has identified education and human capital development as some of the critical contributors to a country’s economic growth, and by extension reduction of poverty (Chirwa & Odhiambo, 2015).

### **5.4.3 Inequality**

The World Inequality Report (2018) reveals that between 1980 and 2016, the wealthiest 1% of the world population experienced a growth in their assets of greater than that experienced by 50% of the world’s poorest. By 2020, in the midst of the pandemic, the world’s 2,750 billionaires grew their asset base by more than R64,8 trillion (\$4,15 trillion), while more than 80 million people were pushed into extreme poverty globally (Global Inequality Lab 2022).

To put the matter in perspective, Africa's total GDP for 2020 was recorded at \$2,7 trillion<sup>59</sup>. This means that the wealth of the world's riches grew by more than one and a half times the entire African economy's GDP.

Sadly, at the Gini coefficient of 63 (in 2021), South Africa still has the highest Gini coefficient in the world and carries the negative title of being the most unequal society in the world (StatsSA 2019b; Gumede 2021:183). In 2020, the World Bank affirmed South Africa to be the most unequal country in the world. Summarizing this notion, The Global Citizen Magazine quoted a 2021 HDR UN report and noted that:

The country's [South Africa's] wealthiest 10%, meanwhile, possesses more than half the nation's income, while the poorest 40% shares just 7.2%. According to Business Insider, this level of income inequality is the largest anomaly observed by the UN's HDI. The country's inequality in life expectancy and education also rank as some of the highest deviations in the world (Mlaba 2020).

Clearly, a lot of work still needs to be done to reach the 0.6 mark targeted by the NDP by 2030. A point has already been made that the average white person in South Africa enjoys a significantly better standard of living than the average African does (Gumede 2021:195). Similarly, the poorest one-fifth live in conditions similar to those of the poorest countries in the world (Gumede 2021:195). It is unsurprising that the income inequality in South Africa ranks as one of the highest in the world and has deteriorated steadily since the turn of the century (Barros & Gupta 2019:20, NPC 2011:3).

On 9 April 2020, the UN Secretary-General, António Guterres, remarked that there was a risk that the limited gains achieved in reducing gender inequality in the world thus far could be rolled back due to the COVID-19 pandemic<sup>60</sup>. This assertion can be backed up the gap in unemployment rates between men and women. We have already observed in section 5.3.1 that while the gap in unemployment between women and men has been persistent, it had nevertheless been narrowing from Q4:2011 (4.7%) to Q4:2019 (4.1%), only to rise again,

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<sup>59</sup> International Monetary Fund. World Economic and Financial Surveys, World Economic Outlook Database obtainable at <https://www.imf.org/en/Publications/WEO/weo-database/2021/October/weo-report> [Accessed on 31 May 2022]

<sup>60</sup> Remarks of UN General Secretary, Mr António Guterres, to the UN General assembly obtainable from <https://www.un.org/sg/en/content/sg/statement/2020-04-09> [Accessed on 30 June 2020].



possibly due to the pandemic, to 5.4% in Q4:2021. Sadly, this new level has exceeded the pre-pandemic level. This may mean that government efforts to reduce inequalities in employment (which is related to income inequality) may have been bearing fruit. The surge in the gap in Q4:2021 may support the notion that women suffered the most during the COVID-19 pandemic, hence the inequality gap not only stopped decreasing, but increased.

Education plays a key role in determining a person's status in society. It has been observed that attainment of higher academic qualifications increases the chance of employability and prospects of being employed in decent and productive employment (StatsSA 2021e:7, 2020b:35, 2019a:7; QLFS 2015: xiv). Because employment is a dominant factor in reducing inequality, and as already demonstrated in section 5.4.1 above, people with higher qualification are not susceptible to becoming victims of inequality, and if they experience any, such inequality is mostly to their benefit (Barros and Gupta 2017:29).

While income inequality persists between women and men, with women being disadvantaged, the 2018 statistics show that tertiary education qualification had an easing effect. StatsSA (2020b:35) reveal a significant change in its report *Poverty Mapping Overview*. Accordingly, women with tertiary qualifications had a narrower salary gap and earned 92.3% of the pay earned by their male counterparts in 2018 (StatsSA 2020b:35). Sadly, for the same period, that gap increased to 53.3% for those who have not completed primary education (StatsSA 2020b:35).

This chapter has thus far primarily been focused on presenting socio-economic perspectives of unemployment, poverty and inequality.

## **5.5 CONCLUSION**

This chapter has analysed the contemporary context of South Africa and determined that unemployment had been stable at around 25% until it breached the 30% mark in 2020, and reached 35,3% in December 2021. However, it continues to be unacceptably high. In addition, while we do not have official data on poverty after 2015, poverty levels are expected to have worsened as a result of the COVID-19 pandemic. Naturally, inequality is also expected to worsen as a result of the two adverse measurements.

The Gini Coefficient, a measure of inequality in a country was recorded at 0.63 in December 2021, with South Africa retaining the title of the most unequal society in the world. This study has affirmed the notion that there exists an unhealthy relationship between poverty and social instability.

In this study, it has been established that the three social ills of unemployment, poverty and inequality are interrelated. Any of the social ills can trigger the others. Significantly, we have seen how a study by Barros & Gupta (2017:29) aligns with the assertion that employment is a dominant source which implies that changes in levels of unemployment have a far greater impact on levels of poverty and inequality, than changes in any of the latter two have on the others. That study concluded that increased employment decreases poverty, and a reduction in poverty leads to a reduction in inequality. Also, it has been demonstrated that inequality has a far greater impact on poverty more than the way economic growth has an impact on poverty (Barros & Gupta 2017:20).

Black people, women and young people remain vulnerable groups with regard to unemployment, poverty, and discrimination. The unemployment levels of whites are relatively low compared to that of other racial groups. Women generally earn far less than what men earn, with the gap significantly narrowing where women have post- matric qualifications. However, women remain more susceptible to labour market shocks than men. Young people have relatively higher unemployment rates, and the pandemic has shown that their susceptibility to labour shocks can also come from the sectors that absorb them the most.

The study has been instructive in that an analysis of the unemployment gap between men and women reveals that the unemployment rate for women exceeds that for men by about 4%, from a peak of 4.7% in Q2:2011. It may appear as if the difference may have been gradually levelling off, albeit at a small pace, as it reached a level 4.1% in Q4:2019, increasing to 4.4% in Q2:2021, before spiking to a level of 5.4% in Q4:2021, most possibly as a result of the pandemic.

Literature exists that has lent credence to the view that economic growth should lead to job creation. However, it has also been observed that past economic growths in South Africa have failed to create jobs. It can therefore be inferred that South Africa must strive to transform its economy to be inclusive. The economy should also significantly reduce levels

of economic inequality whilst also striving to reach levels of economic growth that are significantly higher than those of previous years, and over sustained periods of time, in order to create meaningful employment, and thus triggering the cycle of reducing poverty. In this manner, a movement towards building a more cohesive society will be stimulated.

This chapter has been built on the South African contemporary context and showcased a conceptual understanding of unemployment, poverty and inequality and the relationship between the three. Finally, the chapter was able to present the levels at which these social ills are prevalent in contemporary South Africa.

In the next chapter, we will seek to establish whether Wesley's economic ethics are relevant to contemporary South Africa, with specific reference to unemployment, poverty and inequality, and seek to appropriate them to the context of contemporary South Africa.

## CHAPTER SIX

### WESLEY'S ECONOMIC ETHICS IN CONTEMPORARY SOUTH AFRICA

#### 6.1 INTRODUCTION

Past chapters were dedicated to discerning the facts about socio-economic issues in general. Evidently, the study has illumined these facts by sketching an overview of England's eighteenth-century context in chapter 2, Wesley's familial context in chapter 3, and how both influenced his theology as espoused in chapter 4. It was in chapter 4 that the study highlighted that Wesley's economic ethics were underpinned by principles of (i) the need for government intervention in the economy, (ii) honest and life-enhancing work, (iii) Poverty Alleviation, and (iv) equitable distribution of wealth. Next was chapter 5, in which economic conditions in contemporary South Africa were analysed. Specifically, focus was placed on the state of unemployment, poverty and inequality in the country. That analysis established, among other factors, that employment is a dominant source that can positively affect the reduction of poverty and inequality. It was also established that inequality had a greater bearing on poverty than economic performance per sé. The chapter also illumined the reality that in South Africa levels of unemployment are high, poverty widespread, inequality endemic, and that past spurts of economic growth failed to create meaningful employment. It further argued that a dual approach is necessary in order to deal decisively with these social ills. The first such approach should be a quest to attain significantly higher economic growth rates compared to previous years. The second approach demands concerted efforts to drastically reduce inequality in society. In order to achieve this (dual approach), a social compact may need to be negotiated.

The current chapter intends to establish, judging from work already done in past chapters, whether John Wesley's economic ethics are insightful for contemporary South Africa. This will be done by creating a dialogue between the Christian faith, on one hand, and economic issues of unemployment, poverty and inequality, on the other hand. This dialogue will have a particular focus on John Wesley's economic ethics as outlined in chapter four and their implications on economic issues discussed in chapter five. In order to help create an understanding of the relevance of Wesley's economic ethics in the current context, the study will explore the thoughts of Nürnberger in *Beyond Marx and Market: Outcomes of a century of economic experimentation* (1998) and Gutierrez in *A Theology of Liberation: History,*

*Politics, Salvation* (1988). These two sources will be placed in dialogue with Wesley's economic ethics in order to understand their relevance for the twenty first century. As a starting point, the study will create a framework upon which this dialogue will take place by introducing the concept of economic systems.

## **6.2 ECONOMIC SYSTEMS OF THE WORLD**

It has now become imperative to consider how economies are organized. In its simplest form, an economic system comprises the functions of extracting raw natural resources, processing these into finished goods that must meet the demands of the community, distributing these finished products to consumers, and lastly the consumption of these finished goods and creation of waste. Naturally, waste is absorbed into the ecosystem and will, over time, form raw material, with the same cycle beginning all over again (Nürnberger 1998:9).

Unfortunately, there exists an imbalance in access and distribution of these resources, resulting in inequality and repression (Nürnberger 1998:18). With Nürnberger, this study is tempted to ask, "could it be the overall organisation of the economy which is wrong? More profoundly, could a deceptive ideology underlie this organisation?" (1998:18). Accordingly, this section seeks to sketch a picture of how economic systems operate. It is intended that this section will help bring the work already done into context.

Economies of the modern world are organised primarily around two dominant and distinct systems, these being, capitalism and socialism (Nürnberger 1998:20; Nolutshungu, *City Press* 2018). Capitalism is also known as free market economy, whereas socialism is closely aligned to communism. Interestingly, the father of free market enterprise, Adam Smith never used the term capitalism, instead it was Karl Marx, the father of socialism, who popularized the term through his 1867 project, *Das Capital* (Nolutshungu, *City Press* 2018). For Smith, entrepreneurs produce good, not out of their benevolence, but from positions of self-interests. Unsurprisingly, Smith is famously quoted as having said "it is not from the benevolence of the butcher, the brewer, or the baker that we expect our dinner, but from their regard to their own interest" (Adam Smith cited in Jahan & Mahmud 2015:2). This statement affirms the profit motif of the free-market economy and of its participants (Jahan & Mahmud 2015:2). Nürnberger (1998:29) posits that capitalism evolved from primitive economic systems, such as the mercantilists system. We will recall from section 4.2 that this was the prevalent

economic system during the time of Wesley. As capitalism evolved, values of freedom and initiative (for individuals and groups) became entrenched in the system (Nürnberger 1998:20).) These virtues, together with those of private ownership of property and the right to pursue private enterprise, competition, price determination by an invisible hand ('the market') and a limited role by government in the affairs of people, became and are still the central tenets of capitalism (Nürnberger 1998:20; Jahan & Mahmud 2015:2). These virtues propel prosperity and economic growth (Nürnberger 1998:20; Jahan & Mahmud 2015:3). Ironically, the same values if unchecked often lead to greed which invariably leads to inequality and the marginalization of the poor (Nürnberger 1998:20; Jahan & Mahmud 2015:3). As equality is often a casualty of such a system, the system is susceptible to producing poverty and inequality (Nürnberger 1998:20; Hicks 2015:436).

Furthermore, Nürnberger (1998:20) holds the view that capitalism is an economic system that was built on the ideology of private ownership of the means of production, such as, capital, land, machinery *etc.* Central to this ideology is the freedom to take initiatives for own profit and distribute or reinvest such profit at the option of the owners of capital. West defines capitalism as "a particular system of production in which capital accumulating for profit maximization is achieved at the expense of excluding democratic investment decisions" (West 1992:122 cited in LenkaBula 2008:376). Ward and Himes view the distinguishing feature of capitalism as its connection with "inequality, militarism and ecological destruction" (2014:126). In relation to the aforesaid, Nürnberger presents a concurring view on the shortcomings of capitalism, contending that:

the real failure lies in the fact that capitalism has not succeeded in eradicating mass poverty, reducing the vast discrepancies in income and wealth and preserving the natural habitat for humanity. It has not even tried. In fact, there are powerful indications that it was, and still is, primarily responsible for generating these problems (Nürnberger 1998:3).

In summary, while capitalism promotes freedom and initiative, its shortcomings have been the propensity to create inequality, poverty, and ecological degradation.

The second system, socialism, is an economic system that was born out of the need to radically eradicate shortcomings of capitalism. To counter these negative effects of capitalism, nineteenth century German philosopher and thinker, Karl Heinrich Marx (1818-

1883), together with his friend Friedrich Engels (1820-1895), introduced socialism to the world and compiled the *Communist Manifesto* (Nürnberger 1998:70-71). As Nürnberger puts it, “the advantages of socialism are a mirror image of the disadvantages of capitalism” (1998:59). For all practical purposes, the introduction of communism can be attributed directly to a reaction to the shortcomings of capitalism (Nürnberger 1998:20).

The ideology on which socialism, as an economic system, is built is that of public ownership of the means of production and a distinguishing virtue of the system is the equitable distribution of resources among members of the community (Nürnberger 1998:20; Nolutshungu, *City Press* 2018).

Communism, as an alternative to capitalism, holds supreme the interest of society over those of individuals. A classless society is envisaged, consistent with the teachings of Acts 2:44-45 and following the mantra from each according to his ability to each according to his needs (Nolutshungu, *City Press* 2018; Nürnberger 1998:20-22, 76). Understandably, pursuance of free enterprise is not the norm, and governments are tasked with ownership of all property and means of production. This should result in equitable distribution of resources and benefits. Nolutshungu contends in the *City Press* Newspaper article that Communism, which is also known in some forms as socialism, “is a theory of social organisation in which all assets, including homes, businesses and bank accounts, are owned and controlled by “the community”, hence its name “communism”” (2018).

From the definitions above, it becomes apparent that each of these systems has some strengths and weaknesses. The strength of capitalism is freedom (including freedom to take initiative and use talents) while equity and equality are strengths of socialism (Nürnberger 1998:20-24; Nolutshungu, *City Press* 2018). An emphasis of one value compromises the other. Simply put, freedom allows for a reward for initiative taken and consequently limits equality and equitable distribution of resources and benefits. Also, according to Nürnberger the gifted and brave are rewarded for their efforts where they succeed and are punished when their ventures fail (1998:64-68). This invariably leads to unequal distribution of resources and over time inequality in society, on the basis that the competitiveness of people is not the same. Some people are naturally competitive while others are just outright not competitive. In a capitalist context competition or lack thereof has the unfortunate result of creating

discrepancies in wealth and income distribution (Nürnberger 1998:20; Nolutshungu, *City Press* 2018).

As can be attested to by the afore-mentioned, socialism also has its own failures, chief amongst these being the repression of human freedom (Nürnberger 1998:24). Accordingly, Nürnberger (1998:20, 75-77) believes that an extreme end-product of socialism is a totalitarian state which invariably tends to be repressive. Freedom is not only limited but repressed. Be that as it may, Lenin, one of the leading protagonists of Marxism of late 19<sup>th</sup> and early 20<sup>th</sup> century era, “believed that state repression was indispensable until the time was ripe for communism” (Nürnberger 1998:79). Interestingly, Marx and Engels were acutely aware of the need for the possibility of a resultant totalitarian state and justified it by asserting that it was unavoidable to bring about a radical change towards a classless society (Nürnberger 1998:20). Over time, different shades of these economic systems emerged as attempts to dilute these shortcomings and address the demands of the time (Jahan & Mahmud 2015:2; Nürnberger 1998:20).

Nürnberger begins his project with an astonishing level of negativity as he looks at problems created by these economic systems and laments:

What are these problems? We are witnessing explosive growth in all directions: growth in productive capacity among the rich; population growth among the poor, wasteful opulence and grinding misery; meteoric success stories and mass marginalization; globalized competition for markets and rapid depletion of fossil fuels; increasing erosion and environmental pollution; growing conflict over diminishing resources and the proliferation of increasingly lethal weaponry. Of late all these historical processes seem to be accelerating (Nürnberger 1998:1).

Similarly, Jennings contends,

The earth, reeling as it is, produces more than enough food to feed plentifully every man, woman and child on the planet. Yet our economic system produces murderous scarcity. A few have more than they can consume, so much that garbage disposal is a critical problem, while millions perish in sight of plenty (Jennings 1992:25)



The laments expose the pervasive contradictions of society emanating from disparity. Rieger (2013:30) concurs that the dominant system benefits the rich and powerful at the expense of the poor and marginalized. Similar conditions were commonplace in England of the 18<sup>th</sup> century, as detailed in section 2.4 of chapter 2, and the lament would not be out of place there, in much the same way as it would be found in contemporary South Africa.

Nürnberg (1998:10) holds the view that the contestation in the affairs of the economy is something occasioned by the extent of access to and the distribution of aspects of these economic resources. In some instances, people do not have access to natural resources, mainly land and capital, whereas in others, the distribution and consumption is skewed in favour of certain sectors of society, specifically the rich and powerful. The result is that abject poverty exists side by side with opulence and waste, and it is the poor who are worse off (Nürnberg 1998:10).

As it unfolded, the contestation resulted in the accumulation of power by some, and this challenge created the concepts of “centre” and “the periphery” (Nürnberg 1998:10). According to Nürnberg (1998:10) economic power naturally gravitates to the centre leading to economic prosperity and wealth. Capital and most economic benefits accrue to those in the centre. Sadly, a tiny minority occupies the centre and have high levels of income, in contrast to the periphery, which is occupied by the majority of the people. Those in the periphery are also characterized by very low levels of income. Consequently, there exists “an affluence gap in the centre and a poverty gap in the periphery” (Nürnberg 1998:11). This means that in the centre the income exceeds the need whereas in the periphery the need exceeds the income (Nürnberg 1998:11). Unfortunately, the ‘economic logic’ of capitalism dictates that capital and its attendant laws of the free market, or the invisible hand as is sometimes referred to, come first and human beings, the satisfaction of human needs and basic human rights collectively come second (Meeks 1992:11; Nürnberg 1998:31). Meeks (1989) has a different understanding. In his book, *God the Economist*, Meeks (1989:1) argues that the contemporary ideologies of the free market are based on important theological assumptions and that the theories of God normative in Western culture legitimize for these competitive, consumer-oriented, individualistic ideologies. But the deeper biblical understanding of God is found in the term "*oikos*," by which Meeks anticipates a "household" in which all persons have full access to livelihood (1989:3). To make his point, Meeks outlines his understanding of the Trinity, whose persons he understands to be sustaining and giving and not

domineering, self-serving or self-sufficient (Meeks 1989). Intentionally, in a communist economy, the means of production belong to the community as a whole and the state usually takes ownership of these resources on behalf of the community. The weak and vulnerable are protected against marginalization that would have resulted from their incapacity to provide for themselves. A classless society is maintained at all costs, including sacrificing individual freedoms (Nürnberger 1998:20). Having introduced and discussed prevalent economic systems of the world, the study now turns its attention to similarities and differences between the contexts of contemporary South Africa, and 18<sup>th</sup> century England.

### **6.3 SIMILARITIES AND DIFFERENCES BETWEEN CONTEMPORARAY SOUTH AFRICA AND WESLEY'S 18<sup>TH</sup> CENTURY CONTEXT**

There are many similarities and differences between contemporary South Africa and Wesley's 18<sup>th</sup> century English contexts, a number of which will be considered below. Firstly, England of the 18<sup>th</sup> century was the dominant imperial force in the world whereas contemporary South Africa possesses the most advanced economy in Africa and is one of the three largest economies on the continent.

Secondly, as we have seen in section 4.4, eighteenth century English economy lacked a compassionate face. It was all about profit as workers faced exploitation. Relief work was undertaken without personal interaction. Similarly, contemporary South Africa lacks this compassionate face as can be evidenced by the NDP's recognition of this dilemma in seeking, as one of its targets, to make the economy responsive to the needs of all citizens, especially the poor (NPC 2011). South Africa has adopted a posture of a developmental state which seeks to give preference to the poor. Speaking to a commitment to a 'preferential option for the poor', Gutierrez remarked, "if there is no friendship with them [the poor] and no sharing of life of the poor, then there is no authentic commitment to liberation, because love exists only among equals" (1988:xxxi).

Thirdly, in both contexts there exists a dearth of quality education systems that are accessible to all children. In 18<sup>th</sup> century England, education was a preserve of the elites, and girl children were excluded from the education system. Although this example falls outside the scope of this study and will not be explored further, it suffices to mention that this factor

impacted on the employability of the uneducated, both in 18<sup>th</sup> century England, as explored in sections 2.4; 4.4 and 4.5, and in contemporary South Africa as demonstrated in section 5.4.1. By extension, this contributed to the propensity of the unemployed to remain in poverty.

Fourthly, economies in both contexts improved the lives of only a handful, resulting in high levels of inequality. There is a contradiction of increasing wealth for the elites against increasing poverty for the poor. The affluence gap at the centre and poverty gap in the periphery referred to in section 6.2 earlier can be found in both contexts. There is evidently also crass consumption by the elites against the backdrop of a sea of poverty in both contexts. In South Africa, this situation has been magnified by the COVID-19 pandemic.

Fifthly, as can be recalled from section 2.4, 18<sup>th</sup> century England was characterised by high levels of unemployment, abject poverty, increasing degrees of inequality between the rich and the poor and displacement because of enclosures. Similarly, we have seen in chapter 5 how contemporary South Africa experiences high levels of unemployment, poverty and inequality.

Sixthly, while both governments had policies that could assist in mitigating against the hardships of human existence, these policies were and have been poorly implemented. The English Poor Laws, which was poorly rolled out, had the potential to contribute towards alleviating the plight of the poor in society, if properly implemented. Similarly, the many policy positions adopted by the democratic government of South Africa have been pro-poor, and yet have been poorly managed and seldom fully implemented. Also in both contexts, these policies were susceptible to be abused for corrupt gains.

Seventhly, in both contexts, some segments of the population have been displaced from their land. In Wesley's context, government had as early as 1604 appropriated common land belonging to villagers thus denying commoners, mostly the poor, the right to use the land for farming, grazing *etc.* This was done through acts of parliament, with the first such act being promulgated in 1604. Later, there was introduced the Inclosures Act<sup>61</sup> of 1773 and the General Enclosures Act of 1845. There had also arisen a movement to fight back against enclosures (the seizure by land barons and government of common land historically used for

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<sup>61</sup> Inclosures Act of 1773 – “**enclosure**, also spelled **Inclosure**, the division or consolidation of communal fields, meadows, pastures, and other arable lands in western Europe into the carefully delineated and individually owned and managed farm plots of modern times” <https://www.britannica.com/topic/enclosure> [Accessed on 29 March 2022].

grazing and farming by villagers). Although this subject does not form part of this study, we have also established from chapter five that contemporary South Africa is wrestling with implementation of appropriate land restitution programmes.

As already noted in section 5.2.1, the NDP has proposed land restitution to address historical disposessions, and a number of programmes currently being implemented. While this topic falls outside this study and will not be explored any further, it is prudent to conclude that by being silent on the injustice of enclosures, Wesley denied Methodists an opportunity to learn from him. Consequently, the study is not able to extrapolate what Wesley's thoughts could have been on this important source of economic inequality.

#### **6.4 THE CHRISTIAN FAITH AND SOCIO-ECONOMIC ISSUES**

Having introduced concepts of economic systems and exploring similarities between the two contexts under review, the study now turns its attention to a dialogue between the Christian faith and socio-economic issues. In this way, the study does not only seek to interpret the facts, but to also encounter theological interpretations. Consequently, this section seeks to evaluate economic systems and socio-economic issues using biblical standards. This will be followed by a construction of an argument of whether John Wesley's economic ethics can be insightful to the South African contemporary context of unemployment, poverty and inequality.

It should be noted that reflections in this chapter may appear to be placing more emphasis on unemployment. However, remembering the conclusion from chapter 4 that employment is a dominant source, the study suggests that such emphasis should be seen as being equally and similarly placed on both poverty and inequality. As the study begins these reflections, the study considers the doctrine of original sin, or humanity's fall in Genesis 3. Cloete's (2015:513) understanding of the fall leads her to contend that unemployment, poverty and inequality should not be merely seen as economic phenomenon, but that they should be understood as theological issues. These are bondages from which humanity must be redeemed, because in the thinking of Gutierrez they are conditions which are "incompatible with our faith in Jesus Christ" (1988:xix).

In his seminal work, *A Theology of Liberation: History, Politics and Salvation*, Gutierrez contends that “we cannot separate our discourse about God from historical process of liberation” (1988:xviii). For Gutierrez, structural systems are a basis of structural sin. Gutierrez (1988:257) is alert to the reality that contemporary culture depicts work as ambiguously both a source of meaning and a curse, and elects to view it from a Trinitarian perspective as having been redeemed from all forms of controls by others. In truth, liberation from all that separates humanity from Christ is the central message of the gospel. In embracing this liberation, we need to understand who comes first. In the kingdom of God which Christians aspire to, and as revealed in Matthew 20:16, it is those who are last that are the first. This demands that Christians adopt a posture of ‘preferential option for the poor’, for in the secular world, the poor are invariably regarded as last (Gutierrez 1988:xxv). Furthermore, for Gutierrez, a life of faith is a life of commitment and of prayer (1988:xxx). And yet this life of prayer cannot be separated from a life in solidarity with the poor (Gutierrez 1988:xxxii). Essentially, this is the essence of Christian praxis (Gutierrez 1988:xxxiv). Regarding praxis, Duncan contends:

Praxis thus is more than an ideology to Gutierrez, it is a Way, a spirituality, something more than merely human conduct, but that does include conduct. It is a way of living faith in the present, based on hope in the future. It is action oriented, but also contemplative. Reflection on action constitutes the forward motion of his conception of history (Duncan 1995:290).

This reminds us of St Paul’s assertion in Galatians 5:6, that faith works through love. Accordingly, faith finds its expression through acts of charity and love.

We have already established in section 4.4 that while Smith and his ilk merely theorized about issues such as poverty, Wesley, in a Christ-like manner, identified with the poor and related with them with compassion. He believed that it was among the poor where he was needed the most (*Rules of the Helper*). We have observed in chapter three that from his Oxford days till his death, Wesley visited the poor in prison, preached to the lowly, worshipped with them and was spent in their cause. He saw in them, fellow human beings, who like him, were created in the image of God.

This brings us to the three tenets of biblical faith that the study will now turn its focus to. These are that of the doctrines of *Imago Dei*, the love of God and neighbour, and social

holiness. We have noted in chapter four that these three tenets were central to Wesley's preaching over the seven decades of his ministry. We will now allow these doctrines, and Wesley's economic ethics to be in dialogue with socio-economic issues of unemployment, poverty, and inequality in contemporary South Africa.

#### **6.4.1 An acknowledgement that all are created in the image of God**

As already discussed in section 3.3 above, the image of God in all human beings demands of us to treat other beings justly and with dignity. This is what Wesley did. The Genesis 1:26-27 creation account makes an audacious claim that God created them, male and female in the image of God. Flowing from this claim, it can be argued that human beings find their dignity from the reality of being created in the image of God. This dignity speaks to a sense of self-worth and identity (Cloete 2015:520). Naturally, all of humanity has inherent dignity that comes from the One in whose image human beings are created. It is worth noting that Church Fathers like Irenaeus have been credited with cementing the phrase human dignity into the language of the tradition of the church (Soulén and Woodhead 2006:3). In later years, Church Fathers like Chrysostom taught that human dignity is particularly evident in the concept of *Imago Dei* as a gift graciously conferred upon humanity by God at creation (Claassens 2011:38). By its nature, human dignity is rooted in humanity's relationship with God (Claassens 2011:35). Apart from God, there is no human dignity. And yet, this relationship is supposed to be extended to others. In making the point about human dignity being relational, Soulén and Woodhead makes the observation, "dignity consists not so much in self-possession as in dispossession, not so much in entering into oneself but in reaching out in love and care to the other" (2006:3). Only God through God's grace can make this possible.

Of significance is that human dignity, which is derived from the *Imago Dei*, necessitates the just, equal and respectable treatment of all persons, irrespective of their age, gender, race, religion or any other distinguishing factor. In section 5.3.4 this study asserted that poverty is a product of power dynamics and human relationships in which the powerful can decide who participates and who is excluded from participating. Naturally, exclusion implies that some are regarded as 'the other' and this has the greatest potential of leading to injustice.

According to Brons (2015:69) the concept of other was introduced by De Beauvoir in 1949. This concept encompasses 'the other', 'othering' and 'otherness' as a construction opposed to

‘the self’ (Brons 2015:69). De Beauvoir’s idea was not entirely new but built from Hegel's dialectic of identification and distantiation in the encounter of the self with some other in his "Master-Slave Dialectic" (Brons 2015:69). Crang (1998:61) as quoted in Brons describes othering as "a process (...) through which identities are set up in an unequal relationship" (2015:70).

Using the basis of *Imago Dei* as stimulant of justice, ‘the other’ becomes a violation of justice. Unemployment, poverty and inequality and all that which makes people ‘the other’ need to be redeemed. Since all have been created in the image of God, there is no theological basis for some to be unemployed, live in poverty or excluded from economic activity, especially when the value of the growth of the assets (in 2020) of the world’s richest people has been equated to the total production of an entire continent of Africa. Invariably, this growth can feed and sustain people of a continent, as shown in section 5.4.3.

In acknowledging that all are created in the image of God, and consequently need to be treated justly and with respect, the church must urge the elites to confess their sin and share resources and opportunities with the less fortunate of society.

Created in the image of God, humanity has been commanded to till the earth (Genesis 3:23). Therefore, humanity has the responsibility to productive employment. It is in this vein that Cloete (2015:518) contends that work became an integral part of God’s purpose for humanity right from creation. In view of this, she further contends that a proper understanding of unemployment, poverty and inequality as theological issues is based on the reality that these issues pose a threat to human dignity (Cloete 2015:513). Following Gutierrez’s argument in section 6.4, unemployment, poverty and inequality are situations that must be redeemed, and from which humanity must be liberated. In fact, Gutierrez regards poverty as “institutionalized violence” (1988:xxi). Accordingly, Jennings contends that Wesley knew “that the aim of the divine grace was the restoration of the image of God whereby we become faithful images and reflections of the divine nature” (1992:32).

#### 6.4.2 Agitation for love of God and of neighbour

The next teaching emphasised by Wesley is that of loving God and loving neighbour as we love ourselves. The study has established in section 3.3 that as part of his teachings, John Wesley preached a sermon titled *Almost a Christian*. In the sermon, Wesley explains what a true or altogether Christian does and contends that, of significance, the love of God and of neighbour become evidenced in such a person's life. While an almost Christian will know the true doctrine and care for others, an altogether Christian will be soaked in the love of God, which manifests itself in his/her love for those in need, in the mould of the Good Samaritan of Luke 10:25-37.

In two other sermons, *On the Good Steward* and *On the Use of Money*, the study illumined in sections 4.3 and 4.5 that Wesley outlines how Christians should use resources at their disposal. Wesley asserts that Christians should use resources at their disposal to first meet their basic needs (not luxuries) and use the rest to help alleviate the plight of other persons. Similarly, in John 10:10 Jesus promises life in abundance. This love for God and neighbour is demonstrated by an agitation for life in abundance for others, in the same way as one loves oneself. Interestingly, Thomas Aquinas saw no contradiction between self-love and love of other. In fact, he understood that the love of neighbour did not mean self-hatred but instead meant that self-love was a fundamental prerequisite for loving others (Clark 2011:415). Furthermore, his understanding was that charity and love of God entails the love of one's neighbour (VanderWeele 2020:2197). So accordingly, works of charity and compassion are indicative of the love of God and neighbour. Similarly, the neglect of neighbour is tantamount to neglect to love God (VanderWeele 2020:2197). Post captures the sentiment succinctly when he asserts, "no vision of Christian love that forgets to bring the neighbor towards the divine is finally adequate" (1990:181).

In the final analysis, the love of God is demonstrated by love of fellow human beings, especially the poor, sick, hungry and marginalized. The parable of the goat and the sheep in Matthew 25:45 (NIV) further illustrates this perfectly, "He will reply, 'Truly I tell you, whatever you did not do for one of the least of these, you did not do for me.'

This study suggests that it is the duty of Christian formations like the MCSA to agitate for the love of God and neighbour by enabling the application of strategies that ensure that no one is



left<sup>62</sup> behind, and poverty is eradicated, and inequality diminished. We now turn our attention to the last teaching.

### **6.4.3 Engendering social holiness.**

In section 3.3 above (on the teachings of John Wesley), the study established that John Wesley recognized the reality of the original sin and the fallen nature of humanity. He contended that the only way to get humanity reconciled with God is through a process of Christian Perfection, or Holiness. The study has already made the point in section 3.3 that the phrases or words Sanctification, Christian Perfection or Scriptural Holiness are synonymous. The study also noted in the same section that Wesley described holiness as “a renewal of the soul in the image of God. A complete habit of lowliness, meekness, purity, faith, hope, and the love of God and man” (Hulley 2006:11). Furthermore, the study has also already established that faith finds expression in love. This section now recalls that in section 4.1, Wesley is recorded as having stated that, “the Gospel of Christ knows no religion but social, no holiness but social holiness”, and was convinced that faith must manifest itself in works and engagements with issues affecting societies in which the faithful live (Attwell 1989:134). For him holiness was a restoration to the original state in which God created humanity before the fall, and importantly, holiness always has a social dimension.

It is particularly in relation to this assertion that Gutierrez’s *A Theology of Liberation: History, Politics, Salvation* (1988) becomes instructive. According to Gutierrez (1988), theology must privilege the experiences of the poor, pursue economic justice and result in faith that is underpinned by action, thereby bringing about liberation. The notion of ‘preferential option for the poor’ is mandatory, as Gutierrez proclaims, “in the final analysis, an option for the poor is an option for the God of the kingdom whom Jesus proclaims to us” (1988:xxvii). The proposition offered below, takes cognisance of an advice from Jennings:

Any economic proposals that have a Wesleyan character today must likewise begin with the situation of the destitute and the dying. It is this rather than the notions of development or free trade or gross national product that must be the beginning and end

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<sup>62</sup> Sustainable Development Goals, principle number 2 – obtainable from <https://unsdg.un.org/2030-agenda> [Accessed on 20 June 2021].

of economic policy if the economy of death is to be countered and overcome (Jennings 1992:28).

Emphasizing the liberation imperative of theology, James Cone (2010:ix) had this to say, “Any theology that is indifferent to the theme of liberation is not Christian theology”. In an earlier project, Cone (1978:151) contends that salvation also includes an eschatological vision. Indeed, theology must make sense of the experiences of the poor, unemployed and marginalized of society. In agreeing to the aforesaid, Rieger (2013:30) makes the point that it is only through the eyes of the oppressed that the truth about oppressive systems can best be understood. Hendricks has another way of putting this imperative for liberation when he argues:

In practical terms this means that when we who claim to know God become aware that any of God’s children are caught in webs of oppression of mind, body, or spirit, it is our divine duty to struggle for the liberation and deliverance of our suffering neighbors in the same way that we would struggle for our own (Hendricks 2006:93).

Thus, it is not only essential to theorize about the plight of the poor, but significantly to have an action-reflection-praxis. While Nürnberger (1998:186) brings pragmatism to this discourse, as noted in section 5.2.1, Gutierrez’s theology of liberation attempts to bring balance by introducing a perspective that comes from the global south<sup>63</sup> as well as a commitment to action and reflection, in a similar fashion to Wesley.

In chapter four, during an analysis of Pope John Paul II’ encyclical, *Laborem Exercens – On Human Work*, the study established that the Holy Father contends that “man’s dominion over the earth is achieved in and by means of work” (Catholic Church 1981:6). This assertion has serious connotations as it recognizes that without work, human beings are deprived of their divine duty to be co-creators with God. Importantly, we noted that the ordering must be correct, it must be work for human beings, and not human beings for work – work must serve human beings. Naturally, prominence is given to the primacy of human beings (Catholic Church 1981:18). Church tradition holds that humanity is in a fallen state and needs to be

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<sup>63</sup> According to the UNDP, “‘Global South’ refers to developing countries located primarily in the Southern Hemisphere” [http://ssc.undp.org/content/dam/ssc/documents/exhibition\\_triangular/SSCExPoster1.pdf](http://ssc.undp.org/content/dam/ssc/documents/exhibition_triangular/SSCExPoster1.pdf) [Accessed on 30 April 2016].

redeemed, and further asserts that original sin is man's rebellion against God. Accordingly, this rebellion has led to humanity's alienation from God. Cone (2010:110) recognizes sin as an expression of human fallenness in the Bible and regards it as a theological notion that describes humanity's alienation from God. Furthermore, alienation from this Source results in misery, social ills and human oppression (Cone 2010:112). Unemployment, poverty and inequality represent that state of misery inflicted on others by predominant structures of society.

For Cloete (2015:518) work is a fundamental component of God's purpose for humanity right from creation. This can be attested to by a proper reading of Genesis 2:5, "the Lord God took the man and put him in the Garden of Eden to work it and take care of it". So, correctly understood, even before the fall, God had given humanity the responsibility of working.

From a theological point of view, unemployment then becomes a situation that needs redeeming, as it is not consistent with the virtue of creation as anticipated by God.

In the final analysis, systems and structures that prohibit the above three imperatives, do not bring life in abundance, as proposed by Jesus in John 10:10 and must be resisted. Whether it is unemployment, poverty or inequality or any other contexts that limit the attainment of life in abundance, must be resisted (Tenai 2016:9-10).

It is therefore proper that the UN, through the SDGs', recognized this theological imperative when they record as the aim of the eighth goal of the SDGs (SDG8) to "promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all".

Since we have reflected on the theological imperatives, it is now time for this study to move to the next section and propose actions that can be taken. Social holiness demands action and involvement in the affairs of society, hence the propositions for faith in action below.

## **6.5 PROPOSITIONS FOR FAITH IN ACTION**

The study has noted that in a capitalist society, the poor are pushed to the periphery of society and marginalized. While the study has established that Wesley was silent on the English Poor Laws of his time, it was in his actions and reflections that spoke he the loudest. He undertook many initiatives that were intended to relieve the poor, unemployed and vulnerable. In this instance, the study can learn from Wesley's actions in relation to poverty, its causes, and the initiatives he took to help alleviate the burden on the poor.

A revisit of John Wesley's economic ethics as articulated in chapter 4, points towards the need for a reconfiguration of the economy to be positioned to create more employment, culminating in an inclusive economy as well as realignment of society towards social cohesion. The following are propositions to put faith into action suggested by this study.

### **6.5.1 Employment Creation**

Chapter five concluded with an acknowledgement of employment as a dominant source that can positively affect the reduction of poverty and inequality. Assenting to this view, McCutcheon (2001:263) believes that employment creation in development is one of the key fronts from which the poverty alleviation fight may be effectively undertaken. Thus, governments are correct in focusing their attention on measures that help create employment and reduce levels of unemployment. In this way, an assault on poverty and inequality can be launched.

In addition, while the South African economy is an open economy, governments of the democratic era have adopted postures that are much closer to Wesley than to Adam Smith. These postures can be evidenced by the many policies which were adopted, as alluded to in the section 5.2.1, and whose focus was consistently on the unemployed and creating a cushion against the effects of poverty and inequality. While employment creation was the primary target of these governments, it was understood that increased employment levels would help reduce levels of poverty and inequality. We now know that was not the outcome achieved.

Convention demands that employment creation interventions should include direct long-and-short-term employment creation programmes, creation of enabling environments through

macro-level policies as well as interventions that promote entrepreneurial spirit<sup>64</sup>. Since the NDP also recognises the significance of job creation in the fight against unemployment, poverty and inequality, successive administrations in South Africa have over the years dedicated resources towards employment creation. It is for this reason, for instance, that at his inaugural State of the Nation Address in 2018, South African President Cyril Ramaphosa announced that employment creation, “especially for the youth was at the centre of the national agenda”<sup>65</sup>. The president further unveiled plans to stimulate employment creation which included hosting a Jobs Summit, tax incentives and schemes, as well as growth initiatives<sup>66</sup>. In addition to the above, the government portal also has a tab for ‘find a job’, which acts as a resource of available jobs in the public sector<sup>67</sup>. This message of employment creation has consistently been repeated as an integral part of subsequent state of the nation addresses. A glance at initiatives adopted by the South African government indicate that these are aligned with best practice as articulated above. The ‘find a job’ initiative is consistent with Wesley’s find a job initiative. While Wesley’s initiative did not record any significant successes, this study posits that with dedicated government resources, this initiative has the potential to become useful.

In concluding this section, this study surmises that Wesley’s ethical principle of honest and life-enhancing work has been established to be appropriate to contemporary South Africa. While this study has argued that an ideal economy must be both growing and employment creating, this must not be the only goal. Such an economy must also ‘leave no one behind’ by being inclusive, which is the subject of our next section.

### 6.5.2 Inclusive Economy

The concepts of inclusive growth and inclusive economy have been part of the global lexicon for at least the past decade (Christiansen 2019:282). This development happened as the world was becoming increasingly aware that it was facing uneven development which had consistently resulted in uneven distribution of resources, income and wealth. Without doubt,

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<sup>64</sup> <https://gsdrc.org/topic-guides> GSDRC 2015. Economic Development in Fragile and Conflict-Affected States. [Accessed on 05 April 2022].

<sup>65</sup> <https://www.gov.za/issues/government-priority-creating-decent-jobs> [Accessed on 07 April 2022].

<sup>66</sup> <https://www.gov.za/issues/government-priority-creating-decent-jobs> [Accessed on 07 April 2022].

<sup>67</sup> *ibid*

CK Prahalad has been widely credited with having introduced the phrase, inclusive economy, to the business lexicon, and specifically the phrase ‘inclusive capitalism’ (Christiansen 2019:282). As a business management thinker, Prahalad was concerned with global poverty and how private business could help in poverty eradication. It had also become evident that the neoliberal strategies that were being advanced at the time as silver bullets for development, were good at increasing profits for business owners and yet they could not curtail the increase in poverty levels as most of the world’s population was becoming increasingly marginalized (Christiansen 2019:281). As Christiansen suggests, it had become clear that neoliberal policies such as “opening up borders to foreign capital had proven to be insufficient to promote growth, development, and poverty reduction” (2019:283). At around the same time, a Harvard Business School based strategist, Michael E. Porter, added his voice to this discourse with his notion of “creating shared value” challenging businesses to “serve the broader social purpose, such as poverty reduction” (Christiansen 2019:286). Through this new discourse, the concept of inclusive economy gained traction.

According to Van Niekerk, (2020:520) an inclusive economy is an economy whose growth leads to development and focuses both on the method and products of growth. This growth must invariably be shared, as a truly inclusive economy naturally results in development. Accordingly, an inclusive growth is thus an economic growth that places economic resources optimally in the productive process without excluding other role players (Van Niekerk 2020:520). Ali and Son define inclusive growth as “growth that not only creates new opportunities, but also one that ensures equal access to opportunities created for all segments of society, especially the poor” (2007:12). From these definitions it becomes clear that inclusive growth is about both creation of value (opportunities) and equal access by all, with special bias for the poor.

The study has already noted in section 5.4.3 of chapter five that amid a pandemic the world’s richest, who mostly own multinational companies, grew their assets by more than the gross domestic product of the entire African continent. This happened while more than 80 million additional people were pushed into extreme poverty worldwide. This provides evidence that the current global economic growth is not inclusive and such situation cannot be sustained.

It is thus not surprising that the SDG’s recognize this by including two goals that specifically target reduction of inequalities, specifically SDG 5: achieve gender equality and empower all

women and girls, and SDG 10: reduce inequality within and between countries. This task of reducing inequality is too complex and important to be left to governments alone. As a result, the private sector is challenged to become more inclusive, expanding its mission while reimagining new ways of helping fight poverty and inequality (Christiansen 2019:278). It must be remembered that the NDP articulates as one of South Africa's main developmental priorities "an economy that is more inclusive, more dynamic and in which the fruits of growth are shared more equitably" (NPC 2011:10). To that effect, as already noted in section 5.2.1, the South African government has adopted a posture of a developmental state. Flowing from this posture, government intervention should be a natural consequence. In a developmental state, government intervention to enhance the lives of the citizens is intentional. The obligation of government to intervene in the economy is primarily meant to ensure that 'no one is left behind'<sup>68</sup>. In this sense, Wesley's ethical principle of the need for government intervention in the economy is shown to be appropriate. This intervention should be premised on the drive to ensure that no one is excluded or left behind.

In the same breath, sections 5.3 and 5.4 highlighted the impact of the COVID-19 pandemic on life as we used to know it. It was noticed how at the start of the pandemic most governments world-wide imposed lockdowns and restrictions on economic and other activities. Non-essential economic activities were brought to a halt. While these restrictions were meant to curb the spread of the virus, and 'flatten the curve', they clearly had an element of intervening in the economy. As the pandemic was gradually being brought under control and more data being collated and analysed, resulting in a better understanding of trajectories that may be followed by the pandemic, governments eased restrictions, but still largely retaining the option of reimposing them. While the magnitude of the saved lives may not be known with any degree of certainty, it is appreciated that respective lockdowns and restrictions have helped save many lives, possibly millions, worldwide. The pandemic brought into sharp focus the inherent responsibility of government to intervene in the economy for the common good of society.

As already established in chapter four, Wesley sought to influence the economy to be sensitive and inclusive of the needs of the poor by advocating for government intervention in

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<sup>68</sup> Sustainable Development Goals, principle number 2 – obtainable from <https://unsdg.un.org/2030-agenda> [Accessed on 20 June 2021].

the economy. Wesley was disturbed by economies that sought to address only the interests of the nobles and upper class, while those of the poor were being neglected. Barley was exported to foreign countries and hoarded locally to produce alcohol. This further created injustices against the poor of his time, as these practices created scarcity, inflated prices and placed these basic goods out of reach of those on the margins of society. In a way, an economic dispensation unfolded in terms of which some were catered for while others were marginalized. The economy became exclusive and served only the interest of a select few. What was even grosser was that consumption by the elites was insensitive. Opulence and crass consumption existed side by side with a sea of poverty. This phenomenon of exclusion has managed to find expression in our times, leading the SDG's to commit countries to "leave no one behind"<sup>69</sup>. This simple phrase represents a broad promise and declaration to address the persistent and damaging problems posed by inequality and exclusion. To achieve inclusion, society needs to pay attention to fundamental reasons why some in society are being left behind in the first place. The needs and voices of the marginalized must be amplified and heard properly. Strategies to bring those in the periphery to the centre must be designed alongside the same marginalized people. A society that does not give poverty, inequality and exclusion the necessary attention, runs the risk of potential civil unrest and loss of social cohesion, a subject of section 6.5.3 below.

In line with its posture as a developmental state, the South African government must unashamedly intervene in the economy to correct the mistakes of the past, healing past sufferings, bringing divergent sections of society together and making life better for many of her citizens. An insight that we take from Wesley is that government intervention in society and the economy is inevitable and necessary to among other things, create and sustain an inclusive economy. The emergence of the COVID-19 pandemic has helped make a strong case for this ethical principle.

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<sup>69</sup> Sustainable Development Goals, principle number 2 – obtainable from <https://unsdg.un.org/2030-agenda> [Accessed on 20 June 2021].



### 6.5.3 Social Cohesion

Closely related to the concepts of inclusive economy and employment creation is the concept of Social Cohesion. Like most similar concepts, there does not exist a definitional consensus for this concept (Burns *et al* 2018:1). In that regard, Burns *et. al.* offer the following contribution to the understanding of the concept of social cohesion:

It may seem intuitive to describe it as the glue that binds us together, or the forging of a common sense of identity and belonging. To others, it may speak to a willingness to extend trust to outsiders, to respect fellow citizens and uphold their dignity, and to be moved to action in the face of persistent inequality on behalf of those who are marginalised. Alternatively, specifically in the South African context, its very essence may be seen as common humanity embodied in the notion of *ubuntu*. (Burns *et. al.* 2018:1)

Significantly, Burns *et al* (2018:6-10) view social cohesion as a concept that is grounded on intra and inter group solidarity, uncoerced and non-self-interested cooperativeness, and is closely associated with *Ubuntu*. LenkaBula (2008:378) attributes humanness and personhood to the definition of *Ubuntu*, which in the Sesotho language is translated to *Botho*. Marumo (2019:54) points to the notion of connectedness, especially within a societal frame.

Furthermore, we are reminded that the concept of *Ubuntu* also recognises humanity's interconnectedness and that, as former US president Barack Obama asserted at the memorial service of former South African President Nelson Mandela, "we achieve ourselves by sharing ourselves with others, and caring for those around us"<sup>70</sup>. In the final analysis, Burns *et al* define social cohesion as "the extent to which people are co-operative, within and across group boundaries, without coercion or purely self-interested motivation" (2018:14).

Ultimately, Burns *et. al.* identify contributions made by scholars such as Taylor (1996), Schmeets (2012), Moreno & Jennings (1937), Festonger (1950), Back (1951) and Bruhn (2009) as ascribing social cohesion to "bonds or relationships between fellow citizens and within intimate social groups, especially contexts characterized by ethnic heterogeneity" (2018:6).

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<sup>70</sup> Former US President, Barrack Obama gave a eulogy at the memorial service of former South African President which was held on 10 December 2013

For Lamb, social cohesion can be defined as “the degree to which a society is coherent, united and functional, that provides an environment in which its citizens can live in relative peace and prosperity” (2019:366). On the other hand, the NDP recognizes that at the core of social cohesion “is an agreement among individual people in a society or between the people and their government that outlines the rights and duties of each party while building national solidarity” (NPC 2011a:475). The South African government’s Department of Sports, Arts and Culture (DAC) defines “social cohesion as the degree of social integration and inclusion in communities and society at large, and the extent to which mutual solidarity finds expression itself among individuals and communities”<sup>71</sup>.

This study has already noted an observation made by the NDP that levels of poverty that are persistently high have potential to prompt social instability, which in turn can lead to “a rise of populist politics and demands for short-term measures that lead to further tension and decline” (NPC 2011:4). In this regard, Hicks refers to the work of Richard Wilkinson and Kate Pickett which shows “that there are strong correlations between high levels of economic inequality and high levels of social problems, as well as low levels of social trust, which lead to low voter turnout, formation of gangs, higher rates of crime, and increasing poverty” (2015:437). Conversely, the benefits of societies that are socially cohesive can be enjoyed by all the citizens (Hicks 2015:437-8).

It is worth noting that the attainment of social cohesion in South Africa is a long-term objective of the government (NPC 2011:2). Invariably, governments that value social cohesion dedicate specific departments to become sponsors of projects that promote social cohesion. In the South African context, key government departments that deal with social cohesion are the Presidency and the DAC. While the Presidency is the overarching department in government, all other departments take cue from it and partner with it to develop and implement government policies. Similarly, the DAC partners with the Presidency in promoting social cohesion. As already alluded to in an earlier paragraph in this section, it is unfortunate that universal consensus on the definition of social cohesion does not exist (Burns *et al* 2018:3). Even more unfortunate is that, without a consensus definition, this important ideal is open to abuse by those with their own agenda, defining the concept in a manner that suits their intended goals (Burns *et al* 2018:1). However, there are certain

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<sup>71</sup> What is Social Cohesion and Nation-Building? Document obtainable from the website of the Department of Arts, Sports and Culture, <http://www.dac.gov.za> [Accessed on 30 June 2021].

attributes that should be important in any definition of this ideal. The OECD offers a broader description and accordingly theorises that:

A cohesive society works towards the well-being of all its members, minimizing disparities and avoiding marginalization. It entails three major dimensions: fostering cohesion by building networks of relationships, fighting discrimination, exclusion and excessive inequalities; and enabling upward social mobility (OECD 2012:52-53).

Accordingly, for the OECD relationships and the possibility of individual and group advancement in society are paramount, as is the fight against all that which fosters exclusion, inequality and marginalization. Palmary (2015) reckons that the South African usage of the phrase social cohesion is always linked to nation building, especially in official government documents and the non-governmental space. The implication here is that its local usage emphasizes social cohesion as an instrument for the common good. This stance acknowledges that cohesion can be found even in and among criminal syndicates, and thus may be used as a force for bad. In contrast, international usage of the phrase is limited to it viewed as an element of social capital (Palmary 2015). This study thus understands social cohesion as inter- and intra-group solidarity and shared loyalty between people, premised on ‘preferential option for the poor’.

The cautionary note of the NPC above almost became a reality in July 2021 when a group of disgruntled persons with interest sought to use genuine grievances arising out of concern for corruption, lack of service delivery, high unemployment rates and high levels of poverty, and tried to force the hand of the South African government to disregard a constitutional court judgment (Africa, Gumbi & Sokupa 2021:4). This they did by orchestrating large scale unrest in parts of Kwazulu Natal and Gauteng, wherein shops were looted, property destroyed and violence took place (Africa, Gumbi & Sokupa 2021:3). Indeed, unemployment, poverty and inequality have already been identified as the risks that can jeopardize social cohesion and ignite a rebellion. The report of the expert panel is of the view that the danger of future unrest remains ever present for as long as unemployment, poverty and inequality are out of control (Africa, Gumbi & Sokupa 2021:3-4). South Africa will do well by remembering the attendant risks of a society that is not coherent. Wesley’s principles of equitable wealth distribution and poverty alleviation are consistent with the objective of social cohesion and can point a way towards the achievement of socially cohesive societies.

## 6.6 CONCLUSION

Wesley's mantra of "earn all that you can, save all that you can and give all that you can" is consistent with the South African spirit of *Ubuntu* and should be appropriated. The mantra, while central to Wesley's understanding of economic ethics, helps us to remember our interconnectedness as human beings. This mantra demands that humanity makes efforts to lighten the burdens of others. It also makes the same demands on governments of nations, to make efforts to reduce unemployment, poverty and inequality. Following Wesley's teaching pertaining to this mantra can have the effect of generating employment, creating inclusive societies and building communities that are socially cohesive.

This chapter has shown that since employment has been established as a dominant source that can positively affect the reduction of poverty and inequality, it was correct for the South African government to make employment creation central to the national agenda. It is recognized that with increased employment levels, the other two social ills of poverty and inequality, should naturally be addressed. However, for this situation to obtain, the economy must be inclusive. To that effect, this chapter has also shown the importance of building and sustaining an economy whose resources and benefits are shared amongst the citizens of a country. Importantly, this chapter has also demonstrated that, an economy whose growth leads to employment creation, and whose resources and benefits are shared equitably among the populace (that is inclusive) has the greatest potential to yield a cohesive society.

Finally, this chapter has demonstrated that John Wesley's economic ethics of the need for government intervention in the economy, honest and life-enhancing work, poverty alleviation and equitable distribution of wealth, remain relevant and can be appropriated in contemporary South Africa. This study proposes that the adoption of these ethics will likely result in employment creation, an inclusive economy, and social cohesion.

The next chapter will summarize and conclude the study and offer recommendations for future research.

## **CHAPTER SEVEN**

### **CONCLUSION**

#### **7.1 INTRODUCTION**

The study of any subject is best undertaken by taking cognisance of the context of such a subject of the study. It is for this reason that this study elected to analyse the political context in which John Wesley was born and grew up. It was the stated objective of the study to develop a sound understanding of factors that may have influenced his teachings and theology in his later years. The study also examined his childhood, adult life and familial context together with his teachings. Once this was done, the study then unearthed his central teaching, and theorized what his economic ethics could have been. Below are some of the salient findings of the study.

#### **7.2 THE INFLUENCE AND REALITY OF CONTEXT**

We started the study by sketching a detailed summary of the context in which John Wesley lived and taught in eighteenth century England. This was a context that was marred by controversies and contradictions including internal strifes, rebellions and the waging of wars prevailing side by side with peaceful existence. With the Whigs appropriating loyalty to the throne exclusively to themselves, and by extension positioning themselves as defenders of Protestantism in England, the church lost its prophetic appeal. Amid all these, those perceived as not aligned to positions of the Church of England and Protestantism in general, attracted the ire of authorities.

On the other hand, enclosures enlarged the gulf between the elites and the poor, and further contributed negatively towards unemployment and inequality. With the political loss suffered by Jacobites in the court of public opinion, the cause of human rights and gains that had hitherto been secured were reversed as the armies of the Duke of Cumberland (Prince William) brutally murdered captured rebels.

The English Poor Law, a set of extensive forms of relief of the poor in England, was reaching and providing some form of relief to close to 10% of the population of the kingdom by 1776. Incidentally, most of Wesley's followers came from the ranks of the poor and downtrodden. This relief was prone to abuse and corruption and was often abused by parish overseers. Yet

the study was unable to unearth John Wesley's engagement with these laws. The study also concluded that it is plausible that John Wesley elected to be silent on the English Poor Laws for fear of being accused of rebelling against the throne. Wesley may have likely been brainwashed by the extensive propaganda that he was exposed to during his early formative years and cemented by those in power, like Walpole, who advocated for passive obedience and non-resistance by the subjects. It is possible that his allegiance to the throne may have compromised his ethics, resulting in his silence on policy matters that he was uncomfortable with.

Consistently, the study has shown how John Wesley's teachings and ethics were immensely influenced by his conformist upbringing and his mother's counsel. He was clear on the effects of original sin, that humanity had fallen because of it, and that human beings needed to be redeemed. Wesley taught and preached on Christian Perfection consistently throughout his long ministry. His emphases were on the *Imago Dei*, social holiness, the love of God and neighbour, and prevenient grace. These teachings form the basis of his theology and indeed undergird his economic ethics.

Although Wesley was on record to dissuade his Methodist movement from separating from the Church of England, the study demonstrated that on his demise, that is exactly what happened. In fact, it has become clear from unearthing the facts that while Wesley opposed separation from the Church of England, at least two of his initiatives point to a different motive. The first was in the 1740's when he conferenced with his 'helpers' to discuss doctrine and discipline. In the second initiative, Wesley also constituted the Deed of Declaration naming 'legal one hundred' people who will run the movement on his demise. This last initiative is tantamount to separation. These initiatives became seeds for Methodism to evolve from being a movement into becoming a church. In particular, the study has also demonstrated how the movement by people and adherence to the class system helped establish a church whose footprint can be found in several continents, including Africa. Significantly, the chapter sketched out how Methodism evolved in South Africa amid political challenges of the time.

The study also presented a contextual review of contemporary issues of unemployment, poverty and inequality in South Africa. On analysis of unemployment, it became evident that the levels of unemployment in South Africa have been on the increase in recent years, after

stabilizing at around 25% for a number of years. It was only in 2020 that the unemployment rate breached the 30% mark and as at end 2021, it was sitting at 35.3% (as at December 2021). Also, South Africa remains the most unequal society in the world, with a Gini coefficient reading of 0.63 in 2021.

One significant feature of the study was to establish that employment is a dominant source that can influence both poverty and inequality. This implies that employment creation should be at the heart of developmental programmes. Since the country has in the past experienced spurts of economic growth that were not employment creating, faster and inclusive economic growth should be the goal. As alluded to, this growth must be inclusive and target especially women, the youth, and vulnerable groups. This will be in recognition of the reality that these cohorts are the ones most affected by economic downturn and should be protected.

### **7.3 A SUMMARY OF JOHN WESLEY'S ECONOMIC ETHICS**

Once the context had been unearthed and central teachings illuminated, the study turned to a process of identifying what John Wesley's economic ethics were. In doing so, the study highlighted what the ethical principles which underpinned Wesley's economic ethics were and these are listed as: the need for Government Intervention in the Economy, Honest and Life-Enhancing Work, Poverty Alleviation, and Equitable Distribution of Wealth. It has become evident in the study that Wesley never sought to write systematically about ethics. He was concerned primarily with the experiences of his hearers as he wrestled with practical solutions for their dilemma. His central belief in holiness, and that "the Gospel of Christ knows no religion but social, no holiness but social holiness" convicted him to wrestle with issues of unemployment, poverty and inequality of his time and propelled him to find ways to practically express his faith in the midst of all this brokenness (Attwell 1989:134). He could not perceive himself as aspiring for holiness in isolation, disregarding the material situations of his hearers.

Wesley believed that the mercantilist system, a precursor of capitalism, had to be restrained as it led to misery, unemployment, exploitation and poverty. In addition, it was a major source of inequality in English society. To restrain it, government had to intervene in the economy for the benefit of society at large.

#### **7.4 THE RELEVANCE OF WESLEY'S ECONOMICS ETHICS IN CONTEMPORARY SOUTH AFRICA**

The objective of this study was to engage in a critical examination of the relevance of John Wesley's economic ethics in contemporary South Africa, with specific focus on unemployment, poverty and inequality. This was done by creating a dialogue between the socio-economic conditions of unemployment, poverty and inequality in contemporary South Africa and John Wesley's economic ethics. Now that facts on the two have been unearthed, the study could continue a trajectory that allowed this dialogue. Of essence was to establish if there are any insights that could be learnt from Wesley's ethics and appropriate these to the South African context.

To this end, the study used biblical standards to evaluate economic systems and socio-economic issues (of unemployment, poverty and inequality). This was then followed by an argument to substantiate whether Wesley's economic ethics were relevant to contemporary South Africa.

The study concluded that Wesley's economic ethics are relevant to contemporary South Africa, with specific reference to unemployment, poverty and inequality. Significantly the study also concluded that the mantra of "earn all that you can, save all that you can and give all that you can" is consistent with the South African spirit of *Ubuntu* and should be appropriated. While the third leg of the mantra, "give all that you can" may be the most difficult to implement, the study has shown that the spirit of that leg of the mantra remains useful and can propel a charitable spirit to fight poverty and also help engender equality.

In appropriating Wesley's ethics, Christian formations like the MCSA should strive to foster an acknowledgement that all are created in the image of God, to agitate for the love of God and neighbour, and engender social holiness.

Lastly, in recognition of the reality that faith finds its expression in acts of love, the MCSA must advocate for initiatives that prioritize employment creation, the building of an inclusive economy and social cohesion.



## **7.5 RECOMMENDATIONS FOR FUTURE RESEARCH**

Three possible areas for future research have been identified by this study:

- An investigation of 18<sup>th</sup> century enclosures and apartheid South Africa's dispossession of land from indigenous people of the country.

Both contexts were preceded by periods of land dispossession. As South Africa is anticipating dealing with land restitution policies, it maybe be interesting to learn which approach to follow and which pitfalls to avoid.

- corruption emanating from implementation of pro-poor policies in both the 18<sup>th</sup> century England and contemporary South African contexts.

This study has shown that corruption was rife in 18<sup>th</sup> century England, especially regarding the implementation of pro-poor policies. Did England overcome this scourge? If so, how did they get it right and what lessons can be appropriated to contemporary South Africa

- how education could be used as a stimulant for development and to what extent this has already taken place or not.

In all these instances, the objective would be to identify lessons, if any, that can be learnt from 18<sup>th</sup> century England which could be applied to contemporary South Africa.

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