

# **The golden Jubilee year: Luke 4:16-30 amidst poverty in Zambia**

by

**Lordwell Siame**

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Supervisor: Prof Ernest van Eck

## **ABSTRACT**

This study titled The golden Jubilee year: Luke 4:16-30 amidst poverty in Zambia looks at responsible ways of interpreting biblical texts in impoverished faith communities. The research question this study seeks to address is: How can Luke 4:16-30 be social-scientifically read in the context of the golden Jubilee year amidst impoverished Christians in Zambia, and to what extent can a social-scientific reading of this text be developed? It is the view of this study that the method of interpretation plays a pivotal role when it comes to extracting transformational messages from the Bible.

In Chapter 2, a summary is given on how some selected scholars have interpreted and analysed Luke 4:16-30, using different lenses and approaches. This history of interpretation of Luke 4:16-30 will then be used to identify the research gap that will be addressed in the study.

In Chapter 3 a discussion on the meaning of social-scientific criticism (SSC), and an overview or description of social-scientific criticism is given. This description is necessary because it will be against this understanding of the approach that a reading of Luke 4:16-30 amidst poverty in Zambia in the year of golden Jubilee will be undertaken.

In Chapter 4 an analysis of Luke 4:16-30 is presented in order to uncover its possible original intended (contextual) meaning and purpose. This is done by discussing the socio-cultural-, economic- and political situation in which Jesus ministered. In order to achieve this, the study engages with social-scientific models and theories that are designed to unlock the meaning entrenched in ancient texts.

Chapter 5 provides an overview of the poverty situation in Zambia. The Chapter paints a vivid picture of the poverty situation in Zambia, as well as its causes (i.e., geographical, economic, cultural and demographic). Additionally, the Chapter attempts to outline the impact of poverty upon the livelihood of Zambians, and the measures being put in place to alleviate the poverty situation.

Chapter 6 outlines the findings of the study, as well as recommendations for further research.

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# Chapter 1

## Introduction

### 1.1 INTRODUCTION

This study aims to analyse Luke 4:16-30 based on the elements and values that shape it as a liberating text from the perspective of an impoverished Zambian context in the year of the Golden Jubilee. Zambia as a country attained its 50 years of independence on 24th October 2015. It is believed that in a world where Christianity is losing its influence in its biblical teaching, other socio-political organizations are steadily making successful progress in attracting as many people as possible in the civil society and the corporate world (Safram 2003:133). Whether or not this is a fact will be under examination in this thesis.

The purpose of this study is to go beyond some dominant interpretations of the proposed text in order to construct a biblical framework that responds to the reality of the meaning of the Golden Jubilee. It is emphasized that Jesus' careful selection of Isaiah 61:1-2, when read in the context of his manifesto (Luke 4:18-19), must have understood by his audience as addressing their physical rather than their spiritual needs. In his manifesto Jesus identified three areas of human gratification; "freedom for the prisoners, recovery of sight for the blind and the release of the oppressed" (Luke 4:18-19). These areas of gratification are considered as a prerequisite in constructing a biblical theology of the poor. His pronouncements resulted in establishing a manifesto of his ministry on earth. The text has been interpreted and applied in different contexts. This study approaches this subject as an endeavour to develop a biblical interpretation of the text that will inform readers of the text of the reason why liberation should be the main motif of the Golden Jubilee.

### 1.2 PROBLEM STATEMENT

In Zambia the attainment of independence came with many promises which included the total emancipation of the people from poverty. People were promised that they would have one egg pay day and that the economy would work for all as equal partners (Mupeta 2010; Lumba 2016). Fifty years down the line, poverty has become the currency of talking

in a constitutionally provided-for Christian nation. It is approximated that 60.5 percent of people in Zambia live in abject poverty (World Bank 2014). In his farewell message to the country, late President Levy Mwanawasa lamented that, apart from all his successes, he failed to redeem his country from abject poverty. All successive governments in the past fifty years have seen Zambians move from poverty to abject poverty.

As a challenge, biblical scholarship has the task to respond to this in Zambia regarding the interpretation of Luke 4:16-30. In a time in which many people are converted from poverty to abject poverty in the year of Jubilee, it is an ideal time to offer biblical alternatives to Zambia's situation. This study can be seen as a point of departure to meet this challenge.

### **1.3 HYPOTHESIS**

The hypothesis of this study asserts that the dilemma(s) as stated in the problem statement (§ 1.2) can be addressed by applying the hermeneutical approach known as social-scientific criticism in exegeting biblical texts. Analysing biblical texts through the lens of social-scientific criticism can set the juncture for ordinary Christians to make the link between the text's settings and their own social setting. This study proposes that Luke 4:16-30, when analysed by using social-scientific criticism, can set the pathway to specifically address the current situation of poverty in Zambia.

### **1.4 METHODOLOGY**

In this study qualitative research will be the main tool that will be used to generate research material in the research process. The emphasis will be put on a study of secondary research sources. The study will *inter alia* be conducted in the form of a literature review on the socio-historical background of Luke. In addition to this literature review, an analysis of the selected text (Luke 4:16-30) will be presented using the social-scientific hermeneutical approach. This analysis will especially focus on the social and cultural factors that shaped the text. Social-scientific criticism are most probably the hermeneutical approach that take matters of social concern in ancient texts seriously.



One specific focus on the analysis of the chosen text is that the study will attempt to understand the liberative nature of the Jubilee in terms of its own definition in the text. The focus will be to study the text from an insider perspective (the “natives” point of view) rather than from an “outsider” perspective that of the modern interpreter). Hence, it will be indicated that the social-scientific approach can bridge the gap between the text and the Zambian context. The social-scientific approach will also be used to identify themes (social conditions) in the chosen text that mirrors that of the current Zambian situation; themes that will be used to make proposals for the transformation of impoverished Zambians.

### **1.5 RESEARCH DESIGN**

As opposed to experiments and surveys in which elements of the research design, hypothesis, formation, measurement, and sampling are limited to data collection, this will be done in this study as the study develops. This approach has the potential to supplement and reorient the current understanding of Luke 4:16-30 as a liberative text for the Zambian poor people.

In this case the research design of the study “Golden Jubilee Year: Luke 4:18-19 amidst Poverty in Zambia” will be presented in broad terms while applying it to the Zambian situation. First the social understanding of the text will set the tone of research. Some current literature and journals which address the subject will be taken into consideration to create a foundation for the study. Finally, since the study is done from a native’s point of view with regards to the Zambian situation, the study is placed in an ideal position from which the context of Zambia can be evaluated.

### **1.6 PROPOSED OUTLINE OF STUDY**

This study consists of six chapters. The first chapter serves as an introduction to the study, and in the final Chapter the findings and conclusion of the study are presented. Chapter 2 gives is a discussion on how some selected scholars have interpreted and analysed Luke 4:16-30 using different lenses and approaches. Herein, the interpretation of eight scholars, namely Joseph A. Fitzmyer, Philip F. Esler, Robert L. Brawley, Robert

Tannehill, Paul Hertig, Robert Willoughby, John H. Yoder and Margaret Rodgers are explored. This history of interpretation of Luke 4:16-30 is then used to justify the research gap identified.

In Chapter 3 a discussion on the meaning of social-scientific criticism (SSC) and an overview or description of social-scientific criticism as presented by different scholars are given. This description is necessary because it will be against this understanding of the approach that a reading of Luke 4:16-30 amidst poverty in Zambia in the year of Golden Jubilee will be undertaken.

In Chapter 4 an analysis of Luke 4:16-30 is presented in order to uncover its original intended (contextual) meaning and purpose. This will be done by discussing the socio-cultural-, economic- and political situation in which Jesus ministered. In order to achieve this, the study engage with social-scientific models and theories that are designed to unlock the meaning entrenched in ancient texts.

Chapter 5 gives an overview of the poverty situation in Zambia. To begin with, the Chapter will look at the definition of poverty in the Zambian context. Furthermore, it provides a vivid picture of the poverty situation and its causes in Zambia (i.e., geographical, economic, cultural and demographic). Additionally, the Chapter will attempt to outline the impact of poverty upon the livelihood of Zambians and the measures being put in place to alleviate the poverty situation.

## Chapter 2

# The history of interpretation of Luke 4:16-30

### 2.1 INTRODUCTION

This Chapter presents a picture of how some selected scholars have interpreted and analysed Luke 4:16-30 using different lenses and approaches. Herein, the interpretation of seven scholars, namely Joseph A. Fitzmyer, Philip F. Esler, Robert L. Brawley, Robert Tannehill, Paul Hertig, Robert Willoughby, John H. Yoder and Margaret Rodgers will be explored. This history of interpretation of Luke 4:16-30 will be used to justify the research gap identified.

### 2.2 THE HISTORY OF THE INTERPRETATION OF LUKE 4:16-30

#### 2.2.1 Joseph A. Fitzmyer

Joseph Fitzmyer (1986), in his preface to his commentary on Luke, says that he was prompted to write a critical analysis on Luke with the sole purpose of explaining the views and ideas of the first-century readers that lay behind the text. He acknowledges the fact that many scholars have made attempts to interpret Luke, basing their interpretations on different approaches with different intentions and reasons in mind. For Fitzmyer, the main objective of his contribution is to probe what he calls the “form-critical character” of the texts. In other words, his intention is to establish the literal form embedded in the text of Luke 4:16-30 which readers are likely to encounter in their quest to read the text from a critical perspective. Below is Fitzmyer’s interpretation of Luke 4:16-30, using his “form-critical character” lens.

#### *Luke 4:16*

*“And he came to Nazareth where he was brought up and went to the synagogue”*

Luke is the only one among the Synoptic gospel writers who reports that Jesus had the habit of attending worship in synagogues in conformity with the Jewish custom. Luke presents strongly the good relationship that existed between Jesus and the synagogue

people by showing that Jesus was allowed to participate in synagogue activities such as preaching (Fitzmyer 1986:530).

*“He stood up to read”*

Jesus’ standing to read implies that he followed the common practice of the synagogue. The gesture of handing a scroll to him by one of the synagogue authority, suggest that he was invited to read and address the congregation on that particular day (Fitzmyer 1986:530). A normal Sabbath worship service in the first century Palestine consisted of singing a psalm, reciting a “sema” (Deut 6:4-9, 11:13-21), the reading from the Torah and a reading from a section of prophetic writing called the “Haphtarah,” which was followed by an exposition [homily] and a benediction from the president of the Synagogue which marked the close of the service.

(Fitzmyer 1986:531)

When one critically analyses Luke 4:16-30, it becomes clear that there is no mention of Jesus reading from the Torah in this text. The reason behind this omission is that Jesus, on that particular day, was only interested in fulfilling the prophetic words from the book of Isaiah. Thus he was only pre-occupied with the usage of the Isaiah text for his earthly agenda (Fitzmyer 1986:531). Usually readings in the synagogue came from a prepared cycle of readings (from the Torah and prophetic writings). However, it is important to note that this argument is debatable, because there is no evidence that supports the idea of a prepared cycle of readings being in place in the first century Palestine-synagogues (Fitzmyer 1986:531). Therefore, in this particular incidence (Lk 4:16-30), we only come across Luke’s report that “[Jesus] found where it was written” (Luke 4:16). This statement thwarts the all idea of Jesus reading from a prescribed text. On the other hand, it is also possible in this case to think that Jesus deliberately searched and opened the text he read, given the aim of his mission (Fitzmyer 1986:532).

The text Jesus read came from second Isaiah and this text was “a conflation of Isaiah 61:1a, b, d; 58:6b; 61:2a. In this package two phrases are omitted in 61:1c, ‘...to heal the broken hearted’ (found at the end of [verse] 18) and 61:2b ‘the vengeance of our God (at

the end of [verse] 19)'. These omissions were done deliberately so as to remove the negative aspects of deutero-Isaiah's message (Fitzmyer 1986:532).

#### *Luke 4:18*

*"The spirit of the Lord is upon me, for he has anointed me"*

The anointing of Jesus has presented in the statement "He has anointed me" is purely prophetic anointing, This assumption is supported by the prophetic responsibilities prescribed in deutero-Isaiah's terms, namely the preaching of good news to the poor (Fitzmyer 1986:532).

By proclaiming that "The spirit of the Lord is upon me, for he has anointed me to preach good news to the poor," deutero-Isaiah was announcing the words of comfort to various categories of vulnerable people who leaved in post-exilic communities in Jerusalem (Fitzmyer 1986:532). In Luke's context, Jesus' good news was also targeted for the vulnerable people. In this context, the vulnerable included "the poor"; those who were vulnerable due to poverty caused by social classification, "the prisoners"; people who were imprisoned due to accumulation of debts, "the blind"; blindness here is used metaphorically to mean the less privileged or the unfortunate and lastly "the oppressed" (Fitzmyer 1986:532).

Jesus' mission involved the proclamation of the "year of God's favor" or the "acceptable year of the Lord" as well. In this particular proclamation, Jesus used deutero-Isaiah's description of God's salvific agenda for Zion and applied it to the Galilean context in his quest to push for the new salvific agenda (Fitzmyer 1986:533).

#### *Luke 4:21*

*"Today this scripture is fulfilled in your hearing"*

Jesus sat down upon finishing reading to give an explanation or exposition to the scripture he read. In his exposition he said "these words have been fulfilled in your hearing today." In this case, "today" in generic sense must be understood as "nowadays". This claim is an important point in Luke's perspective, because according to him salvation was to be

actualized at the time of Jesus. The statement “fulfilled in your hearing” implies that, Jesus proclaimed the kingdom of God which was fulfilled through scripture; these kinds of claims are typical of Luke. In most narratives that are full of Old Testament predictions (prophetic or non-prophetic) Luke presents them as having been realized in the now. For instance, the promises of deutero-Isaiah as a comforter to Zion was seen fulfilled or granted in a different way (Fitzmyer 1986:534).

Upon hearing from Jesus’ reading and exposition, people in the synagogue spoke well of Jesus and they were surprised by his captivating way of exposing scriptures. In expressing their admiration of Jesus they asked “is he not Joseph’s son?” This statement clearly shows how common people in Jesus’ homeland understood who he was (Fitzmyer 1986:534).

In response to the reaction of the synagogue congregants, Jesus told them that, one day you will quote a parable for me; “Physician heal yourself”. This parable’s meaning is underpinned in its original context (Fitzmyer 1986:537). People who heard Jesus say it understood it in that context, hence their reaction. These people’s reactions had nothing to do with Jesus’ interpretation of deutero-Isaiah’s text. Similar proverbs are found in many other ancient pieces of literature, though with different connotations. For example, “a physician for others, himself teeming with sores.” Another proverb is; “a prophet is not honored in his own land” which also brought controversy. The usage of such proverbs by Jesus implied that Jesus was saying he himself was such a prophet who was not honored by his people (Fitzmyer 1986:537). Hence whatever Jesus said in reference to Elijah and Elisha confirms that he too was a prophet just like the two, who were not honored despite them being great prophets in the history of Israel (Fitzmyer 1986:537). The two prophets (Elijah and Elisha) ended up taking or performing their ministerial activities in gentile territories rather than in Israel due to the hostility they were subjected to by their own people (Fitzmyer 1986:538).

People in the synagogue reacted with fury towards Jesus because he told them that he like Elijah and Elisha; would take his ministry to the gentiles who will appreciate it. They

took him to the edge of the cliff were they intended to throw him. This scenario overshadows his crucifixion (Fitzmyer 1986:558).

### **2.2.2 Philip F. Esler**

Philip Esler describes Jesus' mission statement as programmatic and in his interpretation of Luke 4:16-30, he focuses on assessing the extent to which the theological features present in Luke's writing were motivated or influenced by the social and political experiences of his community. In short, he analyses Jesus' statements in the light of the social situation of the Galilee community (Esler 1987:164). Below is how he analyses the pericope.

Luke, in Luke 4:16-30, narrates that Jesus' public ministry begun with his visit to the synagogue in Nazareth. The most significant episode in Luke 4:16-30 is the inaugural speech which Jesus quoted from Isaiah: "The spirit of the Lord is upon me because he has anointed me to proclaim good news to the beggars (4:18a)" (Esler 1987:164). This passage demonstrates that Jesus in his speech attached great importance to "beggars". In this context the word "beggar" has a Greek rendering of an English word "poor" if one goes on further to look at the Isaiah quotation which Jesus recited; "to announce freedom for captives, sight for the blind and liberation to those suffering oppression" (Lk 4:18b), he/she would question the role these deprived people mentioned in the recitation were playing in Luke's program (Esler 1987:179). In order to analyse what is at stake in this particular recitation, an investigation into the social stratification of the Hellenistic society where Luke's community belonged is necessary. In this society a huge gap existed between the "haves", who were on the top of the societal strata, and "have nots", who were at the bottom of the strata (Esler 1987:179). When one looks at the social setting in which Luke has Jesus refer to the widow of Zerephath and Namaan the Syrian, one would appreciate what is at play in Luke's pericope (Esler 1987:180). It is argued here that, "For those two represent both extremes of the social spectrum; the widow, one of the urban poor on the brink of death by famine (1 Kgs 17:2), and Namaan, the rich and powerful army commander of the king of Aram (2 Kgs 5:1-5)". The selection of these two characters was motivated by Luke's desire to show that the gospel was open to Gentiles just as it

was to the Jews. Furthermore, this incidence shows that Jesus recognized and authorized the presence of both the poor and the rich in Christianity (Esler 1987:180).

Jesus quoted the passage from Isaiah 61:1-2 and 58:6 with the omission of particular parts, because his interest was in stressing the words which emphasize the proclamation of good news to the “beggars”. The word “beggar”, in this context, meant the state of being inferior in a relationship (Esler 1987:180). However, in an Old Testament perspective, “beggars” were those people who looked up to Yahweh for rescue from oppressors. While in the Greco-Roman cities of the first-century CE the word “beggar” referred to a person who was poor and not a destitute (Esler 1987:180), it is important to note that these words were merely used to describe a particular kind of people in cities; those that had no right to certain privileges such as owning land and were deprived of freedom by the elite (Esler 1987:180). Luke’s interest in “beggars” should be understood in the light of social-economic perspectives which were held in the Greco-Roman society. Let us imagine an extra-ordinary atmosphere that prevailed, when people heard the Lucan Jesus who opted to begin his public ministry by taking a preferential option for the marginalized people in that society; who he identified as the recipient of the good news. Such a move must have been understood as a radical shift from the prevailing social attitudes (Esler 1987:181).

The statements Jesus quoted from Isaiah 61, when understood in their initial context, one would discover that they are imagery. To begin with, “to proclaim freedom for the captives” describes an imagery state of affairs which is synonymous to the liberation of those enslaved in the year of Jubilee as prescribed in Leviticus 25:10. The second imagery context is embedded in the proclamation of the “Lord’s year of favor”. Even though this notion may refer to the release or forgiveness of sinners, the actual context in which Luke uses it goes beyond such a view. In Luke’s view “release” or “liberation” as proclaimed in the statements above have physical and spiritual human bondage implications (Esler 1987:181). In Luke’s gospel, “the alleviation of destitution and disabilities [are] vital.” The liberation talked about in Luke 4:18 must be understood and interpreted in a physical sense rather than spiritual, because the context and period in which the mission



statement of Jesus was particularly applicable may be ascribed to two contexts (Esler 1987:181). The first possible context is 70 CE. During this period Jews fell in a predicament of Roman conquest of Palestine. In this period thousands of Jews were enslaved and scattered all over the Roman Empire, particularly in the eastern part of the Empire. It is believed that during this period many of these slaves converted to Christianity and as such, they faced several challenges in their respective communities, some of which were as a result of their identification with Christianity. Therefore, Luke might have endorsed his idea of release or liberation from such challenges during this period (Esler 1987:182). The second context has to do with the burden of debt that poor people accumulated in their respective communities. Luke's community might have undertaken the idea of paying debts on behalf of the indebted poor people as a way of releasing or liberating them from Imprisonment (Esler 1987:182).

The proclamation of "sight to the blind" (Lk 4:18) is a straightforward matter that refers to the physical healing of the blind people in the eastern part of the Roman Empire. The life of blind people in this particular place was dependent entirely on begging; hence they were in need of empowerment (Esler 1987:182).

The mention of Namaan the Syrian commander and the widow of Zerephath in Luke 4:25 is crucial. These scenarios were meant for the sole purpose of demonstrating that God was able to deal with famine and vulnerability that were common in Luke's community, just as God dealt with the widow's situation in Zerephath and Namaan's situation in Syria (Esler 1987:182). Furthermore, such a reference to the widow of Zerephath and Namaan the Syrian commander is a clear demonstration of the presence of an extreme socio-economic gap or stratification (Esler 1987:182).

### **2.2.3 Robert L. Brawley**

Robert Brawley interprets Luke 4:16-30 in the light of Jesus' identity and ministry. He claims that many scholars, in their approaches, have interpreted Luke 4:16-30 in focusing mainly on the anticipated era of the Gentile church. These scholars have made the

inaugural speech of Jesus focus more on the elevation of Gentiles in Acts than the story of Jesus in Luke (Brawley 1987:6). Brawley interprets Luke 4:16-30 in the following way:

Luke gives the Nazareth episode a decisive importance by giving prominence to this text in the manner that contrasts with Mark's and Matthew's versions of Jesus' inaugural mission narrative (Brawley 1987:11). The Lucan narrative is more detailed than the Markan and Matthean versions. In the first place, it is important to note that Jesus' mission was programmatic and that the prominence given to Jesus' identity in this narrative explains how significant his programmatic mission was (Brawley 1987:12).

Luke elaborates further how Jesus' reputation had grown through his ministry in Capernaum prior to his coming to Nazareth. In this narrative Luke also presents two reports in summary form, which attest to the growing reputation of Jesus. Luke says that Jesus' fame went through out the surrounding country (Lk 4:14), and his reputation went out in every region. These two reports are identical and they both set Luke 4:16-30 with the idea of Jesus' reputation (Brawley 1987:12).

Luke presents Jesus as someone who was filled with the Holy Spirit. This notion emerges from Luke 3:22 where Luke narrates Jesus' baptism incidence; the Spirit descended upon him immediately after his baptism. Luke thus portrays emphatically that the life of Jesus was led by the Holy Spirit (Brawley 1987:12). In most cases, Luke in his writings presents Jesus in this manner that portrays Jesus in contention with demonic forces or powers. Needless to say, even the inaugural sermon is also juxtaposed to his temptation in the wilderness episode (Brawley 1987:12). Since Jesus was filled with the Holy Spirit, he was able to triumph over the demonic powers as evidenced in the wilderness episode. Jesus proved to have been led by the Holy Spirit in this incidence, thus "only then does he embark upon his ministry in Nazareth in the power of the Holy Spirit" (verse 16) (Brawley 1987:12). It is such incidences that prelude his reading from Isaiah 61 and Isaiah 58; "The spirit of the Lord is upon me" and that "Today this scripture is fulfilled in your hearing". These two statements confirm Jesus' anointing by the Holy Spirit, and they also point to his baptism and triumph over demonic powers in the wilderness (Brawley 1987:12).

Jesus' claims of being anointed possess Messianic qualities; the speech in Acts 4:27 in Luke's view interprets the meaning of "anointed one". In this speech a reference is made to Psalm 2 (LXX) in which "anointed one" is translated to mean "made Messiah". This clearly demonstrates that Luke understood Luke 4:18 in messianic terms. Furthermore, it demonstrates that Luke understood Jesus' baptismal anointing by the Holy Spirit as an act that designated him as Messiah (Brawley 1987:13).

The way Luke presents the Isaiah quotation in his narrative gives Jesus an identity as Messiah and a spirit filled person. This state of affair gives us some clue to the background of eschatological jubilee. Luke in this case, employs the Isaiah reading against the eschatological Jubilee which was already established (Brawley 1987:13).

People in the synagogue engaged in speculations about Jesus' identity; "and all spoke well of him, and wondered at the gracious words which proceeded out of his mouth; and they said 'is he not Joseph's son (Lk 4:22)" (Brawley 1987:13). Despite them praising him, they refused to accept his claims going by their discussions (Brawley 1987:14). These people looked at him as the son of Joseph, who grew up in their community. However, in order to deal with the competing view of Jesus' identity, Luke portrays Jesus as someone who took an initiative to utter mind boggling words, which left his audience contemplating; "physician heal yourself" (Lk 4:23). This adage identifies Jesus as a physician and this is made clear by Jesus "lip commentary"; what we heard you do in Capernaum; do here also in your own town. The combination of these two adages exposes people's desire in Nazareth; to see mighty things, which Jesus could do in order for them to support his identity which was set already (Brawley 1987:14). Even if Jesus did not succumb to their desire, for Luke, he still claimed a particular identity, that of a prophet (Lk 4:25). In order to prove the identity that he claimed for himself, Jesus set a test; "no prophet is accepted in his own land", this is the only answer he gave to the expectations of the people in the synagogue (Brawley 1987:14). It is such an understanding coupled with the synagogue sermon from which Jesus announced the fulfilment of the words of the prophet Isaiah, that annoyed the Nazarenes to a point of wanting to kill him (Brawley 1987:15). Jesus articulated the adages contrary to the competing views of his audience, who understood

him as the son of Joseph. Even if Nazarenes failed to recognize him as a Spirit filled messiah, Luke added a prophetic identity to his earlier identity, which clearly demonstrates that the adages did not only authenticate Jesus' claims of prophetic identity, but also posed as a standard by which his claims could be confirmed that "no prophet is acceptable in his own town" (Brawley 1987:16). The example of Elijah and Elisha stood as an illustration of what exactly Nazarenes did; they rejected the prophetic identity of Jesus, when in actual sense he was (Brawley 1987:17). Such a rejection went an extra mile to the point where people wanted to kill Jesus. However, since Jews knew the fate that came with killing an innocent person, that is, legitimizing his/her claims, they could not go ahead with their intentions knowing that they had no sufficient evidence to warrant their actions (Brawley 1987:18). In this particular incidence, Luke presents Jesus as a martyr. Furthermore, people's retreating from their earlier intentions clearly authenticates Jesus' claims about his identity (Brawley 1987:18).

#### **2.2.4 Robert T. Tannehill**

Robert Tannehill (1986: xiii), in his interpretive approach to Luke 4:16-30, attempts to investigate the narrative unity of the pericope. He argues that "narrative unity is unity appropriate to a well-informed narrative." This is based on the assumption that changes and new developments are inevitable in a narrative, but the unity of the narrative remains the same. Tannehill posits that this is possible because the scenes and characters embedded within a narrative contribute to the larger picture of a narrative and they determine its significance (Tannehill 1986: xiii). Below is how he analyses Luke 4:16-30.

Luke highlights the incidence in the synagogue in Nazareth as the first event in which Jesus' ministry is narrated with scenic details. One of the most significant aspects of this narrative is the statement attributed to Jesus, which he made concerning his earthly mission (Tannehill 1986:61). This text is divided into two main parts, with the first part looking at Jesus announcing his mission (Lk 4:16-21), and the second part narrating the conflict that arose between Jesus and the Nazarenes (Lk 4:22-30). Tannehill writes that, Important clues that point to the importance of the first part of the pericope can also be divided into four parts material; major OT quotations, statement of commission which an

important character has received from God, previews and reviews of the course of narrative, and disclosure of God's purpose presented as reliable.

(Tannehill 1986:61)

#### **2.2.4.1 Jesus announcing his mission**

The Nazareth incidence is one of the incidences where Jesus has been reported to have acted under the influence of Holy Spirit. This pericope (Lk 4:16-30) summarizes Jesus' ministry as it is explained in Luke-Acts. Luke here emphasizes the fact that Jesus was "anointed" with the Holy Spirit (Tannehill 1986:63). Luke recognizes the connection that exists between "being anointed" and "royal messiah". Jesus' anointing by the Holy Spirit carried with it some prophetic role. In Luke 4:24-27, the prophetic role of Jesus has been clearly demonstrated (Tannehill 1986:63).

The words Jesus cited from Isaiah 61 and 58:1 in the synagogue demonstrate clearly what it meant for Jesus to be the Son of God. Furthermore, the declaration that was made on Jesus' baptism also demonstrates that Jesus was publicly declared by the Holy Spirit that he was the Son of God (Tannehill 1986:63). These two incidences help the reader to establish the connection between the Holy Spirit and the role of Jesus as the Son of God. This state of affairs must be in the mind of a reader whenever they look and interpret Jesus' mission statement, especially when one looks at the statement; "the spirit has anointed me" (Tannehill 1986:63).

Jesus' proclamation of the "Lord's acceptable year" should be understood in the light of God's reign. This statement is directly related to the reign of God: by proclaiming the "Lord's acceptable year", Jesus was simply announcing the year in which people will be empowered with God's authority. The statement "to proclaim the good news" summarizes the entire activities Jesus undertook. In this proclamation, Jesus outlines people who were the targets of his good news as the poor, the captives, the blind and the broken hearted (Tannehill 1986:63-64). At this point, it is important to take note of the language embedded in Jesus' quotation from Isaiah. The usage of concepts such as the poor, the captives, the blind and the broken hearted in Luke-Acts is significant. Whenever these

concepts are used in Luke-Acts in relation to Jesus, they are meant for the describing the nature of his ministry (Tannehill 1986:64). Therefore, it is important to understand, this kind of language in its original context. In deuterо-Isaiah’s writing words like “poor”, “captive”, “blind” and “broken” were used in a metaphorical sense. In Luke’s context, these words carry the same connotation (Tannehill 1986:64). However, even though these terminologies may refer to people who are physically challenged, their usage in this regard, refers to the economically disadvantaged people. This is so because such people have received particular attention in Luke (Tannehill 1986:64). Therefore, preaching the good news to the poor in this case, means fulfilling God’s purpose of helping the poor and the hungry (Tannehill 1986:64). Even though the good news is eschatological in nature, it is accompanied with an ethical challenge to the rich people with resources to share with the poor (Tannehill 1986:64). This state of affairs is also affirmed in the narrative that comes before Luke 4:16-30, the song of Mary in which Mary declared God’s intervention in the plight of the hungry. Furthermore, this also is echoed in John the Baptist’s teaching, which states that, salvation required that those who had resources should share with the needy (Lk 3:10-11). The proclamation of Jesus made in Nazareth that he was “sent to preach good news to the poor”, picks up from the previous themes from earlier chapters of Luke (Tannehill 1986:65).

Apart from preaching good news to the poor, it is important to understand that there are other significant tasks that Jesus was sent to perform. Notable among them is the “release” of captives; the captives being referred to in this case, are people who were economically oppressed, especially those who were enslaved due to the debts they accumulated (Tannehill 1986:65). The other task was to give sight to the blind. When Jesus talked about “the Blind” in this context he was referring to the works of healing, this task was directly related to Jesus’ healing activities that he embarked on later and notable among these; the healing of the blind that he referred to in his response to John the Baptist in Luke 7:22. Blindness was one physical ailment which was very challenging in this era (Tannehill 1986:66).

The third task was “to proclaim the Lord’s acceptable year” by proclaiming an acceptable year of the Lord, Jesus was announcing salvation that was “characterized by the good news for the poor, release of the captives, recovery of sight for the blind.” Some scholars have emphatically argued that, “the Lord’s acceptable year” is the proclamation of the year of Jubilee which is referred to in Lev 25 (Tannehill 1986:68). However, it is unlikely that Luke was aware of such a connection. When one connects Jesus’ proclamation in Luke 4:18 with his proclamation in Luke 4:43; Jesus says he was sent to “preach good news of the reign of God.” one will discover that there is a repetition of two words (preach and good news). This repetition demonstrates that the good news that Jesus proclaimed had something to do with the reign of God or the coming of God’s kingdom on earth and not the proclamation of the Jubilee year (Tannehill 1986:68).

#### **2.2.4.2 The conflict**

When Jesus declared that “these words are fulfilled in your hearing today”, the response from people in the synagogue was favorable. However, they questioned his status too; “is this not Joseph’s son?” which shows that, even if they were impressed with his proclamation and his speech, they had hidden attitudes entrenched in their hearts. This is evident from the way they reacted when upon understanding fully the nature of Jesus’ mission that, “he will not be acceptable to them” just like Elijah and Elisha prophets who were not acceptable in their homeland (Lk 4:24). The mention of Elijah and Elisha in this narrative was meant to give an extreme example of prophets in Israel who did not fulfil the desire of hearing their own people but instead healed Gentiles (Tannehill 1986:70). Furthermore, the emphasis Jesus placed on the examples of Elijah and Elisha’s ministries in gentile territories overshadows his intentions to take his mission in the Gentile territories too and this enraged the people in the synagogue (Tannehill 1986:71).

The angry reaction of the Nazarenes was precipitated by the fact that they were reminded of the prophets behavior, thus even Jesus at this particular time was not acceptable. However, their intention to kill him failed. Luke narrates that Jesus walked through them and went away. The “passing through the crowd” incidence is somehow a miracle, it is very unusual to see Jews sparing a life of a person who equates them to Gentiles, one

would wonder how such a thing could have happened, given the intentions that the Nazarenes had over Jesus (killing). Luke in this case, deliberately intended that his readers should wonder about this incidence. In other words Luke tries to bring to a fore an impression that suggests that this mysterious action is a deliberate ploy to suggest that Jesus' purpose which was at work will not be blocked by any form of human resistance. Luke presents the same kind of mysteries in the proceeding narratives. There are cases where he has narrated on attempts to kill prophets. For example, on the stoning of Stephen, Luke writes that "he was dragged out of the city" (Ac 7:58). In the parable of the Talents (Lk 20:15), Luke writes that "throwing him out of the vineyard, they killed him", and on the Paul saga Luke writes that he was also "dragged out of the city and stoned". Consequently, the first missionary encounter of Jesus is characterized by the violent reaction also. Jesus, upon announcing words of grace, encountered violent reaction. This kind of reaction is what awaits future Prophets in their homelands. The good news Jesus preached was overshadowed with conflict that persisted till the end of the mission of Acts (Tannehill 1986:73).

### **2.2.5 Paul Hertig**

Paul Hertig (1998:167) analyses Luke 4:16-30 in the light of the Jubilee mission of Jesus. He argues that Jesus, in his mission statement, proclaimed the year of Jubilee by claiming that he was fulfilling Isaiah's messianic prophecy when he initiated his public ministry. This is evident from Jesus' announcement that "the spirit of the Lord is on me, because he has anointed me to preach good news to the poor". Jesus' proclamation ushered in a new Jubilee era, which fulfilled the hopes and dreams of people in his time (Hertig 1998:171).

#### **2.2.5.1 Interpretation of Luke 4:16-30**

Luke begins by narrating how Jesus went to his home town and attended the synagogue where he quoted a messianic text. The text Jesus quoted was commonly quoted in the Qumran community, a community of believers who chose to isolate themselves from the rest of the Jewish community in order to pursue what they saw as a pious life. This community anticipated a messianic visitation.



Upon reading the text from Isaiah 61, Jesus made a radical claim that it was him who was fulfilling the prophecy. By reading from Isaiah 61, and making such a claim, Jesus was “playing upon messianic expectations that still prevailed long after a half century of Babylonian exile”. Even though many Jews were scattered outside the Promised Land, a small population returned to join those who remained in the niche. These people went through several challenges as a result of the actions of “unrighteous” rulers (Jewish and Romans). Due to the challenges Jews endured under the Roman rule, they anticipated a time in which a messiah would come to vindicate them from Roman domination (Hertig 1998:168).

In Luke 4:16-30 Jesus is reported to have selected and read the text from Isaiah 61 and Isaiah 58, after which he sat down. Those present in the synagogue fixed their eyes on him (Lk 4:20). It is very likely that those people “interpreted Jesus’ reading of Isaiah 61 as favorable to themselves and unfavorable to enemies and outsiders who deserved judgment according to their reading of Isaiah 61:2”. It is for this reason that they were astonished with Jesus’ interpretation of the text that “today this scripture is fulfilled in your hearing”; also questioning Jesus by saying “isn’t this Joseph’s son?” (Lk 4:22). The response from those present was positive, even though many scholars tend to think that Jesus understood their response as rejection (Hertig 1998:168).

Jesus recited Isaiah 61:1-2 from the Septuagint version in a *verbatim* manner with few modifications. The first modification is from Isaiah 58:6 in which the phrase “to set at liberty those who are oppressed” was added (see Lk 4:18). The text from Isaiah 58:6 presents an idea of God choosing to loosen people’s chains of injustice. This idea basically means encouraging people to share food with the hungry, and providing for the poor. This is the idea we see Jesus promoting in his statements quoted from Isaiah 61:1-2 and Isaiah 58:6. These two texts are underpinned with a social dimension. Jesus uses this social dimension embedded in the prophetic message to challenge the definition of the Israel of his day (Hertig 1998:168). We can see that, in this particular incidence, Jesus was trying to play a role of a true prophet. In his pronouncements, Jesus re-defined the words poor, captive, blind, and oppressed. The Essenes understood the poor, captives,

blind, and oppressed in reference to their in-group. However, Jesus used these words to refer to the out-group (Gentiles and the impure) (Hertig 1998:169). Essenes identified themselves with the above mentioned prophecy from Isaiah to an extent that they excluded themselves from the Jewish community to lead a solitary life for the sake of pursuing righteousness. They did this by subjecting themselves to harsh conditions by embracing self-inflicted poverty (Hertig 1998:169).

The second modification involves the omission of the phrase “and the day of vengeance of our God” from Isaiah 61:2, as well as the addition of the concluding phrase “to proclaim the year of the Lord’s favor”. This arrangement is significant in the sense that Jesus, in his recitation, purposefully removed all allusions that encouraged hostility towards Gentiles. The actual context of the omitted allusions was anchored in the idea of God’s vengeance, but Jesus was not interested in this interpretation. Instead he was interested in the allusions which were anchored in the good news of liberation. (Hertig 1998:169)

Jesus’ homily demonstrated “God’s impartial grace” which is demonstrated through the announcement of “the year of the Lord’s favor”. This *state of affairs* provides us with a clue on why those present in the synagogue had a mixed response (wonder and questions) to Jesus’ statement (Hertig 1998:169).

Some of those present in the synagogue were amazed at Jesus’ wisdom; they were also puzzled with his messianic claims. They also failed to come to terms with claims of him being the eschatological fulfilment of Isaiah 61:1-2; they rejected both his message and himself. According to Luke 4:21-24, Jesus acknowledged his rejection by additionally quoting an adage “no prophet is accepted in the prophet’s town”. Jesus maintained his earlier interpretation of Isaiah 61:1-2 by giving an illustration on how previous prophets were treated and how they reacted towards their rejection. In this case, Jesus singled out Elijah and Elisha (Lk 4:25-27). He explained that, despite of the fact that Israel at the time of Elijah had many hunger stricken widows, Elijah was not assigned to any of them, but to the widow of Sidon (a Gentile). This illustration correlates with the preaching of good news to the poor of Isaiah 61:1-2. In another illustration, Jesus explained how, despite of

the fact that there were several persons with leprosy amongst the Israel community, Elisha did not heal any of them, but instead healed Naaman the Syrian (also a Gentile). These two illustrations shows how God's grace was not only bestowed onto Gentiles, but also on people of low standing or class among the Gentiles (Hertig 1998:170).

Therefore, Jesus' messianic mission widens the scope of who should be included in the category of "the poor". In this case, "the poor" includes the outsiders and outcasts, and not only the self-appointed and those who inflicted poverty on themselves as a means of attaining purity or righteousness (Hertig 1998:170). Such an inclusion enraged the Jews to an extent that they drove Jesus out of the town to a cliff where they wanted to throw him down (Lk 4:29-29). What people in the synagogue rejected from Jesus' message was the whole idea of an impartial God's grace which encompasses humanity in totality (non-entities inclusive) (Hertig 1998:170).

#### **2.2.5.2 Jesus proclaimed the year of Jubilee**

When one critically examines the text Jesus recited from Isaiah 61, it becomes clear that Jesus proclaimed the year of Jubilee. The words Jesus quoted from Isaiah 61:1-2 contains Jubilee expressions or connotations. For instance, "Jesus ended his citation of Isa 61:1-2 climatically and abruptly with the words, to proclaim the year of the Lord's favor. This phrase and the phrase sent to proclaim release to the captives are rooted in the jubilee language of Lev 25:10, 41" (Hertig 1998:171).

The word for release used in the *LXX* is a translation the Hebrew word *d'ror*, which is also found in Leviticus 25:10. In simple terms, release means "freedom" or "liberty". The word release is used in the book of Leviticus to refer to the release of slaves and property in the fiftieth year (the jubilee year) (Hertig 1998:171). Jubilee which means ram's horn was proclaimed every fifty years. Its pronouncement marked the reversal of the rich and poor; it was a time of release of those who were forced into slavery, and the release of land which was lost due to poverty to the original owners. It was a time of erasing debts and a time of letting the land lie fallow. The Jubilee year was built on a spiritual foundation that

was premised on the strong commandment of releasing people who were in bondage (Hertig 1998:171).

### **2.2.5.3 The roots of Jesus' Jubilee mission in Isaiah 61**

The root of Jesus' Jubilee mission is traced from Isa 61, and even though Isaiah 61 lacks jubilee historical material, some verbs in Isaiah 61 have jubilee roots. These verbs are "anointed me", and "sent me". These two verbs describe Yahweh's action of deliverance. The anointed one of Yahweh is referred to in Isaiah 61 is not only the bearer of the good news; he is also the liberator of the poor from their various sufferings. The deliverance that the messiah brings is fourfold; spiritual, physical, socio-political and psychological (Hertig 1998:172). This is evident in Jesus' expressions and practices in his mission, seen from a holistic perspective (Hertig 1998:172).

### **2.2.5.4 The poor of Jesus' jubilee mission**

The word "poor" was key in Jesus' jubilee proclamation. During the time of Jesus, the word "poor" was understood differently. For Example, the Jewish Qumran community understood "poor" in reference to a particular community of people; the pious who espoused a self-inflicted poverty. In Luke's case Jesus rejected this kind of exclusive way of looking at "poverty", thus giving it an inclusive and broader meaning (Hertig 1998:172).

Jesus had passion for the poor, and he identified himself with them because he grew up in a relatively poor community. This is attested by his mother's song in Luke 1:48 and 53 (Hertig 1998:172). The word "poor" in the Old Testament has social and religious dimensions. The poor in Old Testament times were victims of unjust structures of society; *inter alia* the exploited, the insignificant, and the economically disadvantaged. On the other hand poverty was embraced as a means of living a pious life. This lifestyle was embraced by those who humbled themselves to the point of depending upon God's providence (Hertig 1998:173).

## **2.2.6 Robert Willoughby**

Robert Willoughby deals with the Nazareth pericope with a concern that is strictly limited to discerning the presence of Jubiliary echoes in the words Jesus recited from Isaiah 61:1-2 and Isaiah 58:6. In his analysis of Luke 4:16-30, he attempts to probe the implication of Jubiliary echoes on the interpretation of Luke's concern for the marginalized (Willoughby 2009:41). Furthermore, Willoughby (2009:42) argues that Luke 4:16-30 has programmatic characteristics focused on the experiences of Jesus and his rejection in his home town.

### **2.2.6.1 Reading in the synagogue**

The reading Jesus quoted from Isaiah shows some reductional elements. The quotation is an amalgamation of Isaiah 61:1-2 and 58:6. The quotation breaks off in the middle; Luke portrays Jesus as having held back from declaring "the day of Vengeance of our God". This is because the purpose of his synagogues preaching was not vengeance, but announcing of the year of liberty. Hence he chose texts for his sermon from Isaiah which had Jubiliary echoes (Willoughby 2009:44). To understand that Luke 4:16-30 has Jubiliary echoes, there is need to first of all trace the origin of the Jubilee law, the different contexts in which it was embraced and how it was implemented. These findings will help to analyse Jesus' statements in Luke 4:16-30.

The development of the Jubilee legislation can be traced in the Sabbath laws and amnesty decrees (Willoughby 2009:45). The seed bed of such laws and decrees is found in Exodus in which extensive discussion on the idea of "Release" and "Freedom", and the Sabbath rest of land are extensively articulated (see Ex 21-23; Ex 23:10-11). These laws were developed in the context of an agrarian society, with the sole purpose of bringing humanitarian concern for liberation of God's people (Willoughby 2009:45).

The second scenario where the jubilee motif can be traced is Deuteronomy 15:1-18. The context of this motif is the settled and centralized political reality. In this context the idea of "release" is intertwined with the provisions of "debt cancellation (vs 1-6), and procedures of liberating Hebrew slaves (vs 12-18)". Furthermore, in this case, "release"

or liberation takes a different tone; a demand was put forward that no slave was expected to be released empty-handed, including female slaves (Willoughby 2009:45).

The third scenario in which jubilee legislation implementation can be traced is Jeremiah 34:8-22. The context of this Jubilee scenario is the period of king Zedekiah's reign in Israel. During this period the king ordered partial implementation of the Jubilee provision in the wake of Babylonian threat (Willoughby 2009:46).

The fourth scenario in which a jubilee motif can be observed is Isaiah 61, the text which Jesus cited in the synagogue in Nazareth (Willoughby 2009:46). The context of Third Isaiah is that of socio-political and theological disaster in nature. These disasters befell the Jews upon their return from exile. Hence, Third Isaiah promised "restoration and hope to generations disappointed by their experience of return". In order to give hope to a hopeless community, Third Isaiah drew upon Jubilee imaginary (Willoughby 2009:46).

In view of the above analysis it is clear that the Lucan Jesus was calling upon his hearer's to enact the Jubilee legislation as it was instituted in the Old Testament; Jesus was calling upon those present in the synagogue to redistribute wealth and curtail the power of those people who were influential and rich (Willoughby 2009:48). The Old Testament is a precursor in as far as the debate of whether a literal Jubilee was ever actualized in Israel. However, it is important to know that Jesus' use of Jubilee motif was metaphorical (Willoughby 2009:53).

There is threefold missiological emphasis in Luke 4:16-30: (1) empowering of the weak and the lowly; (2) healing of the sick; and (3) the salvation of the lost. These three are the orbits on which Jesus centres his re-appropriation of the jubilee motif in Luke 4:18-19. If one looks critically at Jubilee law from an Old Testament perspective, it is clear that the law in this context was characterized by concerns for land management, financial provision, and the treatment of slaves. This perspective is broadened and refocused by Jesus in Luke 4 in a slightly different way (Willoughby 2009:53). The programmatic mission statement of Jesus was more less metaphorical centered on fulfilling the jubilee

undertones, even though it does not legitimately represent the concrete stipulation contained in law as prescribed in Leviticus 25 (Willoughby 2009:54).

### **2.2.6.2 Rejection in Nazareth**

The rejection of Jesus in the synagogue in Nazareth is also recorded in Mark 6:1-6a and Mathew 13:54-60. In these accounts, the narratives are brief. It is only Luke that has given readers a detailed account of Jesus' encounter with reference to Elijah and the widow of Zarephath (Lk 4:25-26), and the cleansing of Naaman the Syrian (Lk 4:27). Even though Luke seems to have given a detailed account, it is unlikely that he was the original source of this part of the narrative. Luke's source might have been Mark (Willoughby 2009:48).

The rejection of Jesus in the synagogue was triggered by two factors. The first was the direct claim that he was God's anointed messenger. Secondly, the announcement that the scripture he quoted was fulfilled the moment he read it (Willoughby 2009:49). The reaction of those present in the synagogues was astonishment at his teaching. They also wondered whether such words could come from the son of Joseph who happened to be one of their own (Willoughby 2009:49). Jesus, in responding to his hearer's reactions, drew attention to the experiences of two other prophets (Elijah and Elisha). Jesus showed the crowd that when God forestall Elijah's ministry in Israel during the drought period, Elijah was only able to bring help to the widow of Zarephath (1 Ki 17:1-24). In the same vein, Elisha's ministry towards those who had leprosy in Israel was ineffective, but he was able to heal Naaman of Syria (2 Ki 5:1-19). The meaning of Jesus' testimonies is that these testimonies points to the fact that Jesus identified the ineffectiveness of prophetic ministry in Israel, which resulted in Elijah and Elisha temporarily transferring God's blessings onto the Gentile communities (Willoughby 2009:50).

By this enriching juxtaposition of the acts of Elijah and Elisha and Isaiah 61, Jesus shows that the words meaning poor, captive, blind and oppressed do not only apply exclusively to any In-group but, on the contrary, apply to those to whom God wishes them to apply.

(Willoughby 2009:50)

These Old Testament incidences also help to understand the omission of the last phrase from Isaiah which talks about vengeance. They bring to light the fact that the echoes of jubilee are being re-defined to include all those who were marginalized, including people who might have previously been regarded as enemies (Willoughby 2009:50).

## **2.2.7 John Howard Yoder**

John Howard Yoder, in his interpretation of Luke 4: 16-30, indicates his concern for themes of social-political nature in the narrative with a view of demonstrating that the narrative has Jubilee resonances. Yoder identifies two encounters in Jesus' presence in the synagogue. Yoder's interest in his work is not to discuss the origin, essence and implications of Jubilee as stipulated in Leviticus 25 *per se*. He is interested in analysing the interpretation of Luke 4:16-30 so as to find out how the jubilee vision was been used in a prophetic way (Yoder 1979:37).

### **2.2.7.1 First encounter**

When Jesus appeared in the synagogue in Nazareth, he read a text from Isaiah 61. It is not clear whether Jesus chose the text from the prescribed list or lectionary (set of reading) which was already prepared (Yoder 1979:34). The passage Jesus quoted from Isaiah 61, applying it to himself, was not only a most explicitly messianic one; it states the messianic expectations in the most expressly social terms. Furthermore, the text, as it stands in Luke 4:18-19, breaks in mid – Isaiah 61:26 is omitted to exclude the phrase “the year of the Lord's vengeance.” The omission of the Jewish concept of vengeance, in this case, meant the opening of a new covenant to the nations. This, according to Yoder, is the main point expressed by the entire narrative (Yoder 1979:36).

The phrase “the acceptable year of the Lord” in Isaiah's context referred to a particular event; the end of the Babylonian captive, and the immediate intimidating future of the Babylonian captives (Yoder 1979:36). The understanding of this proclamation of the people who listened to Jesus was different with that of Isaiah's audience. For them the proclamation referred to the Jubilee year; a year in which human inequities accommodated for a period of time would be cancelled – it was a time of new beginnings.



This does not imply that Jesus was taking over the reign of Palestine; he was emphasizing the impact of the Sabbath year (Yoder 1979:36).

The “Sabbath year” or the jubilee year vision as stipulated in Leviticus 25 was kept alive, in “an age when economic life would start over from scratch.” This is demonstrated in the testimony given by Isaiah 61 in which he describes vividly characteristics of the coming renewal (Yoder 1979:38). This coming renewal (jubilee vision) was once upon a time actualized in Israel. The experience of national revival that took place during the reign of Zedekia, which is reported in Jeremiah 34, is such a typical scenario in which the Jubilee vision was enforced. During this period the king “put into effect the ancient law proclaiming liberty to all Hebrew slaves”. This is not the only case in which renewal occurred. This kind of renewal of God’s people happened occasionally in the history of Israelites, and at the end of the age it happened in form of the jubilee (Yoder 1979:38). This is the reason why this renewal and jubilee were an integral part of the prophetic vision, a vision, for example, present in Isaiah 58:6-12. The use of the Isaiah quotation by Jesus was therefore not by chance. Jesus’ pronouncements in ordinary sense were meant for the announcement of a new era whose nature would see humanity cultivate a new attitude where the rich will see the need to give to the poor, and the captives will be freed (Yoder 1979:39). By the statement “this word is fulfilled” one would wonder;

In what sense was Jesus claiming that something was beginning to happen right then in this person? Did anything really happen at all? Was he announcing an event, the realization of which was dependent upon the faith of his listeners, so that it could not come to pass after all because of their unbelief? Or was he announcing what actually did happen then, namely nothing very visible for a while?

(Yoder 1979:39)

It may be difficult to know in what sense Jesus’ proclamation was coming to pass. However, the events he proclaimed were clearly for socio-political and economic restructuring of relations among people of God (Yoder 1979:39).

### **2.2.7.2 The second encounter**

The second theme of encounter of Jesus in the synagogue highlights Jesus' offense to those who were present. In his offensive approach, Jesus referred to prophetic precedence's (Elijah and Elisha), and pronounced that the incidences marked the opening of a new age for the Gentiles. Furthermore, this second part of the pericope is not derived from jubilee proclamation *per se*; it grew out of Jesus' response to the disbelief of his hearers, which came as a result of them being familiar with him (Yoder 1979:39).

### **2.2.8 Margaret Rodgers**

Margaret Rodgers attempts to interpret Luke 4:16-30 with a view of probing whether Jesus truly proclaimed the year of Jubilee in his sermon in the synagogue at Galilee, as proposed by some scholars. She claims that this kind interpretation was promoted by Andre Trocme, a French scholar who championed the idea that a jubilee motif is present in Jesus' sermon. This argument was later popularized by biblical scholars such as John Yoder, who adapted part of Trocme's work. Rodgers tries to probe such a popular and widely accepted way of interpreting Luke 4, the so called "Jesus manifesto". She begins by exploring the actual meaning of jubilee, there after she attempts to investigate whether jubilee was observed throughout the history of Israel as it is presented in Isaiah 61. Finally, she investigates if Jesus indeed proclaimed a year of Jubilee in his mission statement as claimed. She analyses Luke 4:16-30 as follows:

It is difficult at first glance to understand what infuriated the people in the synagogue to the point of wanting to kill Jesus. When one reads the text from Luke 4:16-30 for the first time, one would wonder if the very words Jesus uttered in his speech could warrant such violent reactions from the people who were present in the synagogue (Rodgers 1981:72). In order to understand this fiasco, it requires more than a few comments on Jesus' reference to the widow of Zerephath and Naaman the Syrian whose mention seem to have initiated an attempt to kill him. It is a well-known fact that death penalty in the Jewish law was usually slapped on offenders who were involved in blaspheming God or anyone who violated the Sabbath regulation (Rodgers 1981:72). If one carefully examines Jesus' sermon in the synagogue it is clear that he did not commit any of these offenses. That

being the case, it requires a more comprehensive understanding to discover in which way Jesus might have threatened the life of congregants in the synagogue, which caused them to react violently towards him (Rodgers 1981:87).

Some scholars, like Trocme, have found some clue to this puzzle. They have accepted that Jesus in his sermon was offensive by claiming publicly that he was the Messiah who was promised by the prophets for Israel (Rodgers 1981:72). However, even if such a claim could have angered the congregants in the synagogue, it is imperative that one understands Isaiah 61 within its context. It is only such an understanding that will make one understand what the reaction from the synagogue in Nazareth was all about (Rodgers 1981:72).

Some scholars, like Trocme, understand the Messiah of Isaiah 61 as a liberator whose specific task was to bring social liberation to humanity. They argue that Jesus' intentions were to accomplish exactly what the prophets had promised; to liberate the oppressed of Israel (Rodgers 1981:72-73). Secondly, the acceptable year of the Lord that Jesus proclaimed was supposed to be the year of freedom; the year of Jubilee as was instituted by Moses and well known by everybody who heard about this law (Rodgers 1981:73). However, Jesus' proclamation of the year of freedom threatened the *status quo*; it threatened those who had property and alienated them from the social and economic reform. Jesus' proclamation "implied among other things expropriating the lands of the wealthy and liquidating the usurious systems from which the ruling classes lived" (Rodgers 1981:73). Hence, the fears of the rich and the enthusiasm of the poor people prompted them to stop the social revolution that Jesus pronounced by means of violence. Several scholars have agreed with Trocme's argument that in Luke 4 Jesus proclaimed a year of Jubilee, which, by implication, meant the restructuring of the economic aspect of society (Rodgers 1981:73). Much scholarly attention in this case has been paid to the jubilee provisions set out in Leviticus 25. The relationship that exists between the Sabbath and Jubilee in Leviticus 25 has been noted clearly. If one look critically at the Jubilee legislation as stipulated in the holiness code (Lv 25), there are four major provisions of

the Jubilee law: “(1) the return of all property, (2) the release of all Israelite slaves (3) the cancellation of all debts and (4) the land to lie fallow” (Rodgers 1981: 73-74).

### **2.2.8.1 The return of all property**

The “return of all property” legislation meant that all property that was transacted on bad terms was supposed to be returned to the original owner or family. That is to say, land sold by any Israelite through increasing indebtedness was not supposed to be permanently alienated. It was expected that the buyer would use the piece of land for the specified period of time and then return it back to the owner (Rodgers 1981:74). Furthermore, the price of property was supposed to be fixed depending on the number of harvests remaining from the time of sale and the year of Jubilee. Land was not supposed to be alienated permanently because theologically it was understood that land belonged to God (Lv 25:23) (Rodgers 1981:74).

During the year of Jubilee land was only returned to those who had the stewardship responsibility over God’s land. This provision had an effect of guarantee, because through this law land was not only accumulated by a wealthy minority. The Jubilee stood as an affirmation of God’s authority over all creation, and not an affirmation of capitalists or pro-socialists (Rodgers 1981:74).

### **2.2.8.2 The release of all slaves**

The “release of all slaves” legislation was provided for the sole purpose of releasing all those Israelites who were forced into slavery as a means of repaying their debts that they owed. There were also other legislations in Israel that provided for relief for people who were in conditions of slavery, such as the Sabbath year. It was expected that any Israelite who was sold as a slave was supposed to work for their master for six years, and then, in the seventh year, they were to be set free (Deut 15:12) (Rodgers 1981:74).

The Sabbath legislation was not attached to any particular year, apart from the number of years. Comparatively, the difference here is that the release of slaves in the Jubilee year was coupled with the restoration of land, as well as attaching it to a particular jubilee

year. This meant that the released slaves had means to start life afresh, unlike those who were released during the Sabbath year (Rodgers 1981:74).

#### **2.2.8.3 The cancellation of all debts**

The “cancellation of all debts” legislation was an extension of the provisions of Jubilee legislation. It was expected that interest free loans were to be offered to the poor; no interest was supposed to be charged on any loan that the poor accumulated. Instead, the poor were to be considered for charity in order for them to survive (Rodgers 1981:75).

#### **2.2.8.4 The land to lie fallow**

The “land lying fallow” legislation was designed in such a way that “no sowing, reaping, nor gathering of the crops” was allowed in the jubilee year. In this gesture, people were compelled to live at the mercy and providence of God for three years. In their faith, Israelites would find that God provided for the rich, the poor and strangers in good measure (Rodgers 1981:75).

The injunction put before this people through the provision of this legislation meant that when they rested with regards to their usual productive work (tending the land and crops), it was expected that they should be devoted to the study of the law (Lev 25:18) (Rodgers 1981:75).

#### **2.2.8.5 Implementation of the Jubilee ordinance**

It is difficult to ascertain whether the provisions of Jubilee legislation mentioned above were implemented in the history of Israel. Many scholars have grappled with this issue. Some of them have suggested that the jubilee regulations were only observed and implemented when conditions in society required such interventions. Others “believe that it fell into desuetude through human frailty and became a dead letter”. Some suggest that, the legislation was only observed in matters that related to land (Rodgers 1981:76).

The Old Testament is silent about the recurrent and re-enactment of the jubilee law provisions. This silence can possibly be explained in two ways. First; the Jubilee laws

were well known and they were part of people's lives. Thus further comments on them were not necessary. Secondly, the textual silence implies that these provisions were never or rarely practiced in the history of Israel. For instance, there are cases in the Old Testament, particularly in Jeremiah 34 and Nehemiah 5 where a demand for the release of slaves is mentioned (Rodgers 1981:77-78). In both instances, Jeremiah and Nehemiah never suggested that they were repealing earlier legislation (Rodgers 1981:78).

#### **2.2.8.6 Isaiah 61 and Luke 4**

Rodgers interprets Lk 4 with the understanding given above. She writes:

The quotation from Isa 61 allied with a single phrase from Isa 58:6 is the lynch-pin of the 'Jubilee Manifesto' thesis. For the Jubilee reference comes in the context of the synagogue sermon filtered through the Isaianic quotation, and must be understood in the light of its meaning in its original context. What is the meaning of the passage in its original setting in Isa 61?

(Rodgers 1981:78-79)

The Deutero-Isaiah's song (Isa 61:1-2; 58:6) starts with a prophet claiming to be endowed with the spirit of the Lord. The prophet's message was directed towards the people who were in Jerusalem; the faithful community of hope. The message was full of hope. It was about the promise of "the year of God's favor and the day of vengeance". This phrase is contained with Jubilee metaphors. In this message, the prophet promises the coming of an era of release and liberty to the people of God. It is imperative to note that this message was directed at people who had already experienced release and liberty when they returned from exile. However, they were disappointed by failure to see the actualization of the prophetic promises they heard whilst in exile (Rodgers 1981:79). The proclamation of the year of the Lord's favor must be understood with a jubilee connotation embedded in it. The reference is actually eschatological which uses the Jubilee themes such as release and liberty for all God's people. "Although it is not known for commentators to view this as literal Jubilee proclamation, or a prophecy which may have come on the day of inauguration of a year of Jubilee, there is no evidence in the text to support either view" (Rodgers 1981:79).

It is important to take note that in this proclamation the year of favor goes side by side with the year of vengeance. Vengeance in this case has no punitive connotation; it implies that God's sovereignty will be shown on the community of people who long for liberty in the new era to come (Rodgers 1981:79).

After Jesus quoted Isaiah 61 in the synagogue in Nazareth, he sat down and started to teach. In his homily he said "Today this scripture has been fulfilled in your hearing". When one looks at this statement, the first question that comes to mind is what Luke's Jesus intended with this statement. In what manner is the quotation from Isaiah used in the Lucan text? Is it viewed as operating consonant with the meaning of the original context or is it just an allusive use of the Isaiah material (Rodgers 1981:80)?

If the quotation in Luke 4 is supposed to be used in consonant with Isaiah 61, then one should remove the possibility of interpreting it in light of the Jubilee year. This is because the text from Isaiah 61 is metaphorical and eschatological. However, if the quoting of Isaiah 61 was done in an allusive way, the literal interpretation of it in the light of Jubilee is possible. To determine whether the quotation was a mere allusive usage, one needs to explore the theology that underpins Luke, that is, how Luke presents Jesus as the Messiah (Rodgers 1981:80).

In Rodger's view, only Howard Marshall presents key issues that open the door to the understanding of Luke's theology. Marshall argues that the purpose of Luke's writing was to present the gospel of salvation to his readers. Luke wanted his readers to accept Jesus as the Messiah. In short, Luke's aim was to provide a path of salvation in plain terms. His message is summed up in Jesus' words "for the Son of Man came to seek and save the lost" (Lk 19:10).

The climax of the concept of salvation, as presented in Luke-Acts, is centered on the reception of forgiveness of sins. In this regard, it is argued that salvation requires repentance which is linked to the forgiveness of sins (Rodgers 1981:81).

Luke presents Jesus as the promised Saviour. His coming on earth inaugurated the coming of a new era which pointed to the prophecy of Isaiah. The implication of this view is that the activities of Jesus may be described as eschatological in the sense that his appearance was not only for that particular moment, but was also inaugurating the end time (Rodgers 1981:81). This resonates with the Isaiah 61 quotation found in Luke 4 which has an eschatological sense when viewed in its original context. As such, this rules out any suggestion of an allusive quotation. Therefore, Jesus' proclamation of the good news to the poor, release of prisoners, recovering sight for the blind and freedom for the oppressed must be understood as metaphors of salvation which comes with the forgiveness of sins (Rodgers 1981:81).

Jesus never called people to follow him on any programmatic mission which had to do with economic and political restructuring. There is no evidence that supports such an idea throughout the entire Luke-Acts account. Jesus' teaching and his activities do not show such an understanding (Rodgers 1981:81-81).

### **2.3 CONCLUSION**

From the discussion above, it can be appreciated that an interpretation of Luke 4:16-30 has been done extensively from different approaches and perspectives. However, not many scholars, like Esler, have interpreted the narrative from a social-scientific perspective, the approach this study intends to employ. Moreover, no study has been done in reading Luke 4:16-30 with a focus on a Jubilee year amidst the poverty in Zambia. This is the specific focus this study wants to address. In the next Chapter social-scientific criticism, as exegetical approach to analyse ancient texts, is discussed.



## Chapter 3

# Methodology: Social-scientific criticism

### 3.1 INTRODUCTION

This Chapter provides an explanation of what social-scientific criticism (SSC) as an exegetical approach entails. It should be noted from the onset that SSC cannot be described in a few words. Therefore, it is necessary to give an overview on the description of SSC as presented by different scholars. A description of SSC is necessary because it will be against such a description that a reading of Luke 4:16-30 amidst poverty in Zambia in the year of Golden Jubilee will be proposed.

### 3.2 SOCIAL-SCIENTIFIC CRITICISM (SSC)

SSC is part of an exegetical task that analyses the social and cultural aspects of scriptures (ancient texts) and their environmental context through the use of methods, perspectives, and models generated by the social sciences (Barton 1997:277; Elliott 2011:1; DeSilva 2004:119). SSC is a stage in an exegetical process that brings scrutiny to bear on the social codes and cultural values active within the world of the New Testament scriptures (DeSilva 2004:119). This methodology attempts to put the New Testament texts into their social and cultural context of the first-century Mediterranean world (Mathews & Van Eck 2013:1). Elliott writes that,

As a component of the historical-critical method of exegesis, Social-Scientific Criticism investigates biblical texts as meaningful configurations of language intended to communicate between composers and audiences. In this process it studies not only (1) the social aspects of the form and content of texts but also the conditioning factors and intended consequences of the communication process, (2) the correlation of the text's linguistic, literary, theological (ideological), and social dimensions and (3) the manner in which this textual communication was both a reflection of and response to a specific social and cultural context, [and], how it was designed to serve as an effective vehicle of social interaction ... an instrument of social as well as literary and theological consequence.

(Elliott 2011:1)

The key words that come out clearly from the above descriptions are exegetical, analysis, social, cultural, context, text, New Testament, and the social sciences. Thus, using these key words, one could broadly define SSC as an exegetical tool that analyses the social and cultural context of the New Testament world (first-century Mediterranean world) using social scientific perspectives, theories and models. SSC approaches the text of the New Testament from the view point that meaning in language is embedded in a social system that is shared and understood by speakers, hearers and readers in the communication process (DeSilva 2004:119).

SSC is not a new or independent methodology, but a sub-discipline of historical-critical methodology. This methodology brings social scrutiny to bear on the texts and their geographical, historical, economic, social, political and cultural aspects embedded therein (Elliott 2011:1; DeSilva 2004:119). Social-scientific criticism is a “component” of the historical-critical method that investigates New Testament texts as significant configurations of human language, authored for the intended purpose and audience (Barton 1997:277; Elliott 2011:1).

The role of SSC is to complement the historic-critical method by investigating the social features of the form and content of the text along with the factors that gave shape to them (DeSilva 2004:119). While historical criticism aims at investigating issues of “authorship, dating, language ... history of the tradition etc.”, SSC strives to investigate the common people; their understanding of world interactions and their way of interaction with one another (Barton 1997:277). SSC aims at digging out aspects of the text that are left hidden by traditional exegetical tools (Barton 1997:277). In this case, SSC looks for complimentary relationships between the text and linguistic and literal aspects, as well as ideologies and social dimensions; each of these aspects contribute to the proper analysis of the New Testament text (DeSilva 2004:119).

The questions that help dig out hidden aspects of the text appear in two different forms. The first one utilizes tools of analysis, while the second utilizes tools of investigation. Both tools use social science disciplines such as sociology and cultural anthropology in their

approach. In the investigation process, SSC scrutinizes the religious, geographical, historical, economic, social, political and cultural aspects operative within the world behind the New Testament text (Elliott 2011:1; DeSilva 2004:124).

Furthermore, SSC, as a component of the historical-critical method, does not only study the social aspects of the form and content of the text; but also accomplishes its task by studying three critical relationships that exist between the text and its cultural context. Mathews and Van Eck (2013:1) outline these three critical relationships as follows:

1. The conditioning factors and the intended consequences of communication process. An exegete needs to take into consideration the language behind the text, the cultural and social implication of the text in its original context.
2. The correlation of the text's linguistic, literal, theological (ideological) and social science dimensions. An exegete needs to be aware that texts in their original contexts are not supposed to be viewed in a one sided dimension. An exegete needs to take into account the relationship among factors that make up a text, such as its social-, theological- and literary dimensions.
3. The manner in which the textual communication is both a reflection of and a response to a specific social cultural context. This is to say, one needs to look at how the text was designed to serve as an effective vehicle for social interaction and an instrument of social as well as literary and theological consequences. By taking such a step, an exegete will aim at interpreting biblical texts from a etic position, just as the way an occupant of the first-century Mediterranean world would interpret it.

These critical relationships must be taken into consideration in biblical exegesis in addition to the form and content of the text (DeSilva 2004:119; Mathews & Van Eck 2013:1).

### **3.3 WHY DOES INTERPRETATION NEED TO BE INFORMED BY SOCIAL SCIENTIFIC AWARENESS?**

According to Dunn and Rodgerson, people emanate from particular social groupings where they employ indigenous forms of communication dependent on their culture without

thought, that is, “spontaneously, unself-consciously, colloquially, typically they do not expect fleetingly, recognize that there are any ‘concepts’ involved at all, since in their communities, ideas and realities they form are naturally and indissolubly bound up together (Dunn & Rodgerson 2003:979). Therefore, SSC helps an exegete to identify and make plain meanings in communication that might otherwise pass interpreter’s notice (Dunn & Rodgerson 2003:979).

The SSC approach to understanding ancient texts is necessary in the exegetical enterprise for many reasons. The first reason being that exegesis requires a social scientific dimension because every biblical text is a product of events that are social in nature. Texts carry within them portraits of “social relations, social structures, social institutions, roles performed and statuses held [in a given] social arena”. Any given biblical text is not just a merely composed piece of literary writing; but a product of social and rhetorical matrices (Elliott 2011:1).

Second, biblical materials are products of a particular social context and they are designed to serve as ways of social communication and interaction; as such, they prompt social action in their targeted audiences. Hence, an interpreter needs to use SSC to understand such a reality (Elliott 2011: ).

Third, a social scientific dimension in exegesis is necessary because biblical texts are embedded in the cultural systems of the contexts in which they were produced, implying that their “genre, content, structure and meaning are all culturally and socially determined” (Elliott 2011:1). Even if certain cultural and social information is explicitly in the text and to some extent readers may presume to know it, when not explained extensively, readers may not know what is embedded within the text. Hence extensive knowledge of the social and cultural system is very important, because such knowledge helps the reader to know “how the systems were constituted, how they operated, how they shaped the perspectives, values, interests and objectives of the author presented in a particular text” (Elliott 2011:1).

Fourth, a social science dimension in exegesis is essential because it helps in exploring and explaining the relationship and patterns of sociality programmed in the text (Elliott 2011:1). They also help in understanding “the structure and components of social systems; the dynamic of social relations; core values; typical attitudes and perspectives; and prominent social-cultural behavioral scripts” (Elliott 2011:1).

Fifth, SSC provides readers with adequate reading scenarios. Biblical readers historically have proved that they are appreciative of the creation of mental reading scenarios in order to understand New Testament texts. SSC brings to the fore appropriate mechanisms that direct readers attention to the reading scenarios with details that give readers cultural and social world of ancient times (Elliott 2011:2), while at the same doing away with scenarios that include details that are alien to the culture and context of the text (Elliott 2011:1).

Sixth, SSC aims at identifying the regularities and recurrences so as to provide clarity on those peculiarities and unusual behavior and social interactions which are spotted in the text(s). In short, SSC focuses on outstanding and unique personalities, as well as groups events which are of concern for an exegete (Elliott 2011:2).

The fact is that, in most cases, exegetes pay particular attention to theological concepts and thoughts, while ignoring social information embedded in biblical texts even if they come across it. SSC, in the seventh place, therefore aims at addressing this kind of omission both at textual- and social context level (Elliott 2011:2). Exegetes need tools to enable them handle such social information they come across. SSC provides these tools or method(s) that pay particular attention to the relationship between beliefs and behavior, and the relationship between culture and beliefs, ideas, and other spheres of life such as economics and social life (Elliott 2011:2).

Finally, SSC is imperative in the exegetical enterprise because it is prompted by the fact that the understanding of texts requires imagination, expression and communication; elements that are socially and culturally conditioned. Hence the need for a method that

helps in identifying and analysing such information in order to create determined perception and understanding (Elliott 2011:2).

It is imperative to take cognizance of the fact that the role of SSC is not to make a social description of a particular context; it is a textural interpretation that goes beyond mere social description (Elliott 2011:2). Explaining the social reality in biblical interpretation is important, but what is of utmost importance in this methodology is to supply an exegete with methods and models of understanding the relationships at play in the social phenomenon under investigation. In this case, social-scientific analysis and explanation of phenomena presented in the text is imperative (Elliott 2011:2). Elliott argues that “SSC differs from ‘social historians’ by denying the existence of scholarly ‘immaculate perception and theory-free or value-free analysis and by insisting on explication of all theory and conceptual models used for interpretation” (Elliott 2011:2).

In view of the above, it is clear that SSC is required for the exegetical enterprise to move a step further, that is, to “move beyond the enlightened ‘hunches’ of geniuses of analysis theories that can be tested and then reapplied, refined or rejected, by all exegetes alike” (Elliott 2011:2)

### **3.4 FEATURES OF SOCIAL SCIENTIFIC CRITICISM**

There are four features that are typical of the methodology of SSC. Proponents of SSC presuppose that knowledge is socially conditioned and by nature are conceived in a particular perspective (Elliott 2011:3). It is for this reason that many of them do not envision exegesis without a social presupposition attached to it; just as exegesis cannot be conceived without a theological presupposition (Elliott 2011:3). Elliott argues that proponents of SSC are of the view that biblical interpretation must always attach a component on the clarification of the social location of the interpreter, the text, and its authors under investigation (Elliott 2011:3).

The second feature is that proponents of SSC attempt to distinguish between ‘emic’ point of view and the ‘etic’ point of view; concepts adopted from ethnologists. By ‘emic’ they

imply information supplied by indigenous informants based on their “frameworks of experience, knowledge and rationalization”, while by “etic” they imply analytical perspectives and categories of modern investigators (Elliott 2011:3). A contrast between these two concepts implies that an exegete will be able to distinguish the information supplied to him/her by indigenous informers and thereafter analyse the information using modern perspectives and categories (Elliott 2011:3).

In terms of the exegetical exercise, the description given above can be understood in the following manner; “emic” stands for the biblical texts and other ancient sources, while ‘etic’ represents contemporary readers such as scholars (Elliott 2011:3). In this arrangement an exegete remains conscious of the gap that exists between himself/herself and the world behind the text, that is, the literary production of ancient materials under investigation (Elliott 2011:3). This kind of awareness minimizes anachronistic and ethnocentric readings and evaluations of texts. Furthermore, such an awareness helps to curb “an overly eager application of ancient biblical texts to modern ethical issues and to critique inappropriate ascription of modern perspectives and values (such as universal freedom and equality) to the decidedly non-egalitarian societies of the ancient world, including the Jesus movement” (Elliott 2011:3).

The third feature is that SSC proponents from the outset know that there is no perception that is spotless, hence they rely on postulated hypotheses and conceptual models which help them to shape their investigation of the social contexts of ancient texts. Here, the method of SSC “proceeds from the hypothesis, theory and models to data collection, analysis and finally, interpretation and explanation” (Elliott 2011:3). Data represents the products of the hypothesis created about the nature and relation of the phenomena. Data is not the actual raw phenomenon. In SSC, the hypothesis about the nature and relation of specific social phenomena are fathered from conceptual models. In this process they function or act as analytical lenses and cognitive maps which the interpreter uses in order to view, filter and organize meaningful raw materials which are available to the interpreter’s senses. For instance, SSC proponents use sociological models to detect and connect “social dots”, which in return are used on the textual and cultural landscape and

these help in assessing social significance and impact (Elliott 2011:3). In textual investigation conceptual models are helpful in that they help in investigating ancient texts and their social context by describing “[h]ow things were, how they were related and how they worked” ( Elliott 2011:3).

The fourth feature of SSC is that its proponents aim at bringing out social arrangements and cultural values and norms which may be present (latent) in the text, but not stated in the ancient text ( Elliott 2011:3). In other words, SSC exposes the thoughts of the texts or its process of everyday life to be more comprehensible for the readers. In the ancient world religion, just like economics, was not an independent and alone standing institution. It permeated all spheres of the institutions of the city (*polis*) and the household (*oikos*). Hence, in SSC investigations one should go beyond mere scrutiny of religion, and touch on political religion and domestic religion which were shaped by different structured values and norms of political and domestic lives (Elliott 2011:3).

The fifth feature of SSC is that it makes comparison between biblical cultures and other traditions of the pre-enlightened period. A comparative study reveals structural behaviors, similarities and regularities, regional and historical differences. These aspects are essential in determining the pattern of behavior and belief systems found in biblical communities and their writings. Thus, the more interpreters of historical culture engage SSC the better; they become more experts in making sense out of the cultural traces they investigate (Elliott 2011:3).

The sixth feature is that in SSC there are a number of social and cultural issues that are analysed together with their scope and complexity, which vary from macro-, mid- to micro levels. Scholars in this field therefore normally focus their investigations on broad and encompassing topics, depending on their biases (Elliott 2011:3).

### **3.5 THE MERITS OF SOCIAL SCIENTIFIC CRITICISM**

SSC plays a pivotal role in the interpretation of New Testament texts. One of the positive aspects of SSC is that it regenerates the historical-critical method by enlarging the New



Testament interpretation agenda by allowing different sets of questions to be asked when it comes to interpret texts, while providing tools to help answer these very questions (Barton 1997:279). This, in the end, helps the interpreter to appreciate the fact that the New Testament texts were produced in specific religious, social, economic, and political contexts. The other positive aspect of SSC is that it provides interpreters with the possibility to widen their scope of knowledge in understanding the world behind New Testament texts, as well as the narrative world within the text (Barton 1997:279). Thirdly, SSC equips interpreters with skills to guard against old-fashioned and ethnocentric readings of Scripture. It helps readers to “locate their own particular social and cultural contexts [by] hearing the NT text in their cultural and social context, supplying more accurately missing information shared and assumed by author and the audience” (DeSilva 2004:126).

### **3.6 THE DEMERITS OF SOCIAL SCIENTIFIC CRITICISM**

Like any other biblical interpretation method, SSC has its weaknesses too. Many scholars have argued that engaging in such an approach, New Testament interpretation may be a serious and dangerous undertaking, simply because the approach is prone to reductionist errors (Barton 1997:280). For instance, some critics feel that, when using SCC, an interpreter may end up locating from the text (early Christianity) only what one is looking for or what sociology is equipped to discover and leave out other essential aspects of the text. To some extent, in the event when the data available is insufficient to guarantee a thorough investigation, this could lead to excessive dependence on models drawn from observations of modern group’s religious and cultural norms in order to fill in the blanks (DeSilva 2004:127). Another weakness is that, this approach “may just be too blunt a tool of analysis to do sufficient justice to the startling novelty and historical particularity of the movement inaugurated by Jesus” (Barton 1997:280).

Many critics of this approach have questioned whether the available data has capacity to provide sufficient sociological investigation; given that reliable social scientific investigations come out of observations and testing of findings with living examples (DeSilva 2004:127). Other critics feel social sciences are unreliable, given the concerns

they have posed to the theological enterprise right from their inception in the post-enlightenment atheism positivism. For example, Milbank (quoted by Barton), posits that the social sciences “are parasitic on Christian orthodoxy and represent modern heretical deviations grounded in ideological and methodological atheism” (Barton 1997:280).

However, it is not every biblical scholar who feels this way. Many of them support the idea that SSC has provided the exegetical enterprise with a different flavor and perspectives, which helps in providing a different kind of information that is required to give a real picture of the world behind the New Testament texts (Barton 1997:281).

### **3.7 EXEGETICAL METHOD APPLICABLE TO SOCIAL SCIENTIFIC CRITICISM**

#### **3.7.1 Exegesis**

Andrie du Toit (2009:112) defines exegesis as the science that is involved in critical interpretation of biblical texts in order to unveil their intended meaning. In this regard, exegesis provides an exegete with methods and techniques which are essential for unlocking the world behind biblical texts and the concepts embedded therein. Du Toit suggests that it is important to note that the enterprise of exegesis must be devoid of an exegete’s personal presuppositions or an exegete’s preferred exegetical method and opinion. The most important thing to note in this undertaking is this that “the first and decisive rule of exegesis respects the summary of the text” (Du Toit 2009:112).

When SSC focuses on biblical text it takes into consideration broad concerns related to issues of social structures and cultural patterns that form the context of the given biblical text. The second area of focus is the biblical writings themselves, that is, how they refer to “specific sets of values, models of social interaction or their social institutions and strategies for serving as effective means of social communication and interaction” (Elliott 2011:3). The SSC exegetical approach takes two basic directions which is the social cultural investigation and social scientific exegesis itself (DeSilva 2004:119-120).

### **3.7.2 Socio-cultural investigation**

In this category, SSC seeks to investigate the social world in which the New Testament texts were composed and read. Here, SCC takes into consideration the study of sociological data provided in the texts themselves; as well as the investigation of the real social reality behind the text by studying issues such as the socio-economic, socio-political, social organization that influenced the formation of early Christianity.

### **3.7.3 Social-scientific exegesis**

The emphasis in this category is premised on the “analytic and synthetic interpretation of the text”. This enterprise entails combining exegetical and sociological disciplines’ practices and techniques (Elliott 1981:7). Hence, SSC’s exegetical process does not only focus on the exegesis of the text itself, but also looks at the ways in which social science research models and theories help in textual analysis. Sociology plays a pivotal role; it provides questions directed at New Testament texts which help to unveil the real world behind the text. This helps the reader to understand the text at hand (DeSilva 2004:119).

## **3.8 CONCLUSION**

The discussion in this Chapter indicated that SSC is a sub-discipline of the historical critical method. Many scholars have acknowledged that this method is helpful in understanding underlying social, cultural, political, and economical issues that are embedded in biblical texts not usually visible to the readers. The Chapter has also shown that exegesis, using SSC, takes two approaches; social cultural investigation and social scientific exegesis. In the next Chapter, a social-scientific analysis of Luke 4:16-30 will be done.

## Chapter 4

### A social-scientific reading of Luke 4:16-30

#### 4.1 INTRODUCTION

This Chapter attempts to give an analysis of Luke 4:16-30. It is intended to undertake a careful reading of the proposed text in order to uncover its original intended meaning and purpose. In this quest, a social-scientific exegetical approach, as discussed in Chapter 3, will be used. This will be done by a discussion of the socio-cultural-, economic- and political situation in which Jesus ministered. In order to achieve this, we shall engage the social-scientific models and theories that are designed to unlock the meaning entrenched in ancient texts as discussed in the previous chapter. This Chapter is divided into four main parts, namely the Introduction-, the socio-cultural milieu of the first-century Mediterranean world-, which then will be used as lenses in the analysis of Luke 4:16-30-, the social-scientific exegesis and the conclusion.

#### 4.2 SOCIO-CULTURAL MILIEU OF THE FIRST-CENTURY MEDITERRANEAN WORLD

In this Chapter several social-scientific theories (reading scenarios) will be used to read Luke 4:16-30. Luke's account of the story of Jesus does not capture the many and diverse ingredients of the real world of the first-century Mediterranean, hence what we have is the world as portrays by Luke (Green 1995:4). From the previous chapter it became clear that Social Scientific Criticism focuses on the audience of the text; particularly the text's socio-cultural world. As far as Luke 4:16-30 is concerned, we place ourselves in the first-century Mediterranean world, in a country called Palestine, and to be more precise, in the synagogue of Galilee (Green 1995:6). Therefore, whatever social investigations the text may impress us with, they need to be analysed and researched from within this context. It is this study's conviction that the social investigations or models that will be used need to be informed by Luke 4:16-30. Only the underlying social issues embedded in the text will be investigated. From the researcher's observation of the text, some of the social

cultural issues identified are honor and shame, patronage and clientism, and the personality of the first-century Mediterranean people.

#### **4.2.1 Patronage and clientism**

In the first-century Mediterranean society relationships were understood in personal terms, and the most common form of relationships was patron-client relationship which existed between the powerful and the people that depended upon them (Malina 1996:143; Saller 1982). Epigraphic and literary evidence from the first-century Mediterranean world attest to the fact that the Roman social order was characterized by patronage and clientism (Van Eck 1995:169). Patron-client relationship is one of the human values that were espoused in the first-century Mediterranean world. Patrons gave to clients' social-, political-, and economic resources which clients needed for their survival, while clients reciprocated with the gesture of loyalty and honor which were useful to the patrons (Moxnes 1991:248). Moxnes (1991:242) defines patronage as a relationship that exists between people of unequal status and difference in power. In the first-century Mediterranean world there was a strong division in terms of relationships. These relationships were divided between a small group of elites and the large mass of village peasants at the bottom (Moxnes 2001:187). Relationships of this nature are mainly common among people of unequal status and resources, such as "landlord/vassal, aristocratic/peasant, king/subject, father/son and God/Israel" (Shively n.d.:9). A structure of domination was prevalent in this society, and was "defined around power and privilege, and it was measured by a complex of phenomena – religious purity, family heritage, land ownership, vocation, ethnicity, gender and age" (Green 1995:11). This type of hierarchies and patterns of relationships were almost the same, whether in the political or social arena (Moxnes 2001:187).

Even though patron-client relationships were prevalent in the first-century Mediterranean world, the Roman version of patron-client relations was practiced in many territories which they concurred (Malina & Rohrbaugh 1992:326-328). The Roman type of patron-client relationship was practiced in form of stratification. In conquered territories Romans regarded their subjects as clients. Clients in this regard, were considered inferior to the

elite (patrons). This kind of arrangement was considered sacred, whereby patrons fought for honor which ensured that they monopolized political and economic opportunities, while their clients competed against each to have an honorable patron (Malina & Rohrbaugh 1992:326-328).

Patronage in the first-century Mediterranean society was characterized by “reciprocity”, “brokerage” and “friendship”.

#### **4.2.1.1 Reciprocity**

Reciprocity is a form of exchange of resources that happens between two individuals or groups of people. In the first-century Mediterranean world, reciprocity was commonly practiced between patrons and clients. It was expected that when a “patron” gives anything to the “client” (a gift or any needed resources), a client was expected to reciprocate the gesture by giving to the patron what they needed (Van Eck 1995:169).

Models of understanding the types of social exchange which were at play in the Greco-Roman world have been studied extensively by scholars from different social science backgrounds ranging from anthropology, sociology, and political science. These studies have been particularly done from two perspectives; the interpersonal relationship angle (which studies particular dyadic relations among patrons and clients), and an institutional and social interaction angle (which focuses on investigating the social interactions among different associates, e.g., elites and peasants; Batten 2009:168).

Reciprocity was practiced in three distinct forms, namely general-, balanced- and negative reciprocity (Van Eck 2011a:6).

##### **4.2.1.1.1 General reciprocity**

General reciprocity is an informal type of reciprocity that took place between family members, clan or tribe. In this kind of reciprocity it was expected that if someone gave anything to another, such a one was not expected to receive anything in return. In this

way, a patron may possibly acquire influence over client(s) and could demand for the payment of his/her debts at any time (Van Eck 2011a:6).

#### **4.2.1.1.2 Balanced reciprocity**

Balanced reciprocity is a formal type of reciprocity that was practiced in two distinct ways. The first form of reciprocity involved social equals, while the second form involved people of unequal social status. In both cases, a *pro quid pro* kind of arrangement applied, that is to say, whenever somebody gave out something, they expected something in return (Van Eck 2011a:6).

#### **4.2.1.1.3 Negative reciprocity**

Negative reciprocity is a form of exchange between people of unequal status which usually resulted in exploitation and self-interest (Van Eck 2011a:6). For example, a patron in this case would offer a much needed resource to the client (who in most cases were peasants) in exchange of the client's most dependable resource such as land and honor. In this kind of arrangement the aristocrats benefited at the expense of their clients (Van Eck 2011a:5-6). Consequently, one can clearly see how patron-client relations powerfully damage "horizontal group organization and solidarity", especially in cases where exchanges between the patron and client are not bound by any kind of legalism. In this case, it is the clients who stand to lose in case of exploitation by the patron; the client would have nowhere to turn to for protection (Van Eck 2011a:5-6).

#### **4.2.1.2 Brokerage**

Brokerage is one of the important elements in patron-client relationships. A broker is a social entrepreneur who manoeuvres exchanges between patron and clients. Brokers played a very significant role in the first-century Mediterranean society. The role of the broker was basically to bring two parties or individuals together. In the Roman Empire brokers were people who mediated between people of different classes, groups and individuals. They used strategic skills to broker relationships. Brokers were skilled in convincing both parties to venture into enterprises of different nature for the obvious

reason that they accrued benefits for themselves, and this motivated brokers to engage in such deals (Batten 2009:167; Boissevain 1974:147).

It was common for most of the patrons in the Roman Empire to practice broker deals. Apart from giving their own resources to their clients, patrons also opted to broker certain deals. Clients accessed resources that belonged to the most powerful people in society through this kind of brokerage. For example, a patron could serve as a broker between local cities and the central government (Moxnes 1991:248).

There are two forms of brokerage which were practiced in the Greco-Roman Empire, namely cultural- and divine brokerage (Batten 2009:169).

#### **4.2.1.2.1 Cultural brokerage**

A cultural broker is someone who was a bridge between his community and the outside community. Usually cultural brokers acted like outsiders to both patrons and clients. Brokers, despite acting in this manner, they still maintained membership in their respective communities; they maintained, for example, their ethnicity and religious affiliation, while at the same time brokering deals between the state and communities (Batten 2009:169). It is for this reason that brokers were either trusted or distrusted in their communities depending on their dealings. Brokers, at times, acted as social agents of change; they were the voices of their respective communities by acting as channels of communication between two parties (elite and peasants). In trying to copy the lifestyle and culture of the elite, brokers at times were also agents of cultural innovations in their respective communities (Batten 2009:169).

#### **4.2.1.2.2 Divine brokers**

According to Batten, patronage, clientage and brokerage applied equally to the religious sphere as in social interactions. In the first-century Mediterranean society a god was seen as a benefactor, and worshippers were perceived as clients. Thus various religious officials, such as priests and prophets, functioned as brokers between the gods and their



followers. Brokers, in this case, brokered the favor of the gods in exchange for human gratitude and praise (William 1999:120).

In ancient Judaism, God (Yahweh) was perceived as a patron in addition to other roles such as father, king or Lord. In both the Old Testament and New Testament many prophets and other biblical figures at times played the role of brokers by mediating between God (patron) and the people or worshippers (clients). The prophets normally presented the people's demands to God, and *vice versa*. This is also evident in the early-Christian writings, in which several figures play the role of a broker (Green 1989).

#### **4.2.1.3 Friendship**

Friendship was another way in which patron-client relationships were practiced in the first-century Mediterranean society. This form of patronage was common both in political and social relationships. Friendship in this society was the only form of relationship that was less structured and less formal (Moxnes 1988:62). Friendship carried several obligations, such as helping a friend when there was need. One was considered honorable through fulfilling his/her obligations and by minimizing demands from the partner; as such sharing hospitality was normal and expected (Moxnes 1991:248).

#### **4.2.1.4 Common features in patronage and clientism**

Many societies that are prone to patron-client relationship have similar features of how such relationships are practiced (Van Eck 1995:170). Anthropologists describe patron-client relationships as "particularistic" that is to say, patrons do not treat every potential client the same, and instead, certain groups or individuals are preferred out of favoritism (Pilch 2001:372). In other words, some individual or groups of people are considered to be the "chosen ones" hence they are singled out as the favorites. Favor is one of the largest goals that are pursued in patron-client relationships, especially for societies that are group oriented (dyadic). Favoritism in patron-client oriented communities is practice in two ways; it is practiced among people of equal status and power, whereby, favors are exchanged in time of need and they are mostly in similar quality (Van Eck 1995:170-171). The second type of favors takes place between people of unequal status, in this case the

exchange of favor is qualitative that is to say “ material for immaterial, goods for honor and praise, force for status support.” As such patron-client relationships last long, for a long time in certain cases (Pilch 2001:372). Furthermore, patron-client relationships are also common in relationships that are characterized with the element of exchange and benefits. Consequently, relationships of this nature are based on inequality tendencies which in the end create a huge gap between the patron and the client in terms of benefits accrued through reciprocity of resources (Pilch 2001:370). In these relationships, patrons tend to monopolize certain positions of ultimate importance on the part of clients, especially access to production, markets and centre(s) of society. As a result, patrons turn out to be wealthier and more powerful than clients, and they use such power and influence to thwart whatever threatens clients and they commit to support them in order to maintain the status quo (Pilch 2001:370).

#### **4.2.2 Honor and shame**

Honor and shame are two important values attached to the appearance of people in the first-century Mediterranean society. First-century Mediterranean people cannot be understood without first of all understanding their values (honor and shame). Honor and shame were pivotal values of the first-century Mediterranean society (Shively n.d.: 9).

##### **4.2.2.1 Honor**

John Pilch (2001:358) defines honor as “the claim of worth, value and respect which must be publicly acknowledged.” While Malina and Neyrey (1991:25) describe honor as “the positive value of a person in his/her own eyes plus the positive appreciation of that person in the eyes of his/her social group.” From these two descriptions, one can see that honor is truly attached to the appearance attached to an individual(s) by either him/herself or other people. It is about the value that one sees in him/herself. In short, one can say honor is about what one claims to be vis-à-vis what other people perceive him/her to be (Van Eck 1995:165). For example, “when a person perceives that his/her actions do in fact reproduce the ideals of society, he/she expects other people in the group to acknowledge that fact, and this in the end result into “a grant of honor, a grant of reputation” (Shively n.d.: 4). Honor is an intangible phenomenon, which “depends upon society’s

understanding of power, gender and precedence in order to become concrete” (Shively n.d.: 4).

There are two sources of honor: Ascribed honor and acquired honor. Ascribed honor is a passive status that one attains through other people. This kind of honor is bestowed upon someone by his/her family or clan in whom he/she is born. For example, in the first-century Mediterranean Palestine, it was common knowledge that one automatically inherited honor socially by virtue of being born male or merely coming from a rich or powerful family. Acquired honor, is that kind of honor which is actively sort and attained through achievements, For example, acquired honor may stand for honor that is achieved through attaining a first position in athletics, military, or any certain competitive skill (Pilch 2001:359; Malina & Neyrey 1991:25; van Eck 1995:165-166). By nature, all social interactions in the first-century Mediterranean society potentially focused on contest for honor (Shively n.d.: 4). This *state of affairs* was very challenging, because in this society honor was a limited good. As a result of that, attaining honor meant that somebody had to lose it first. Therefore the greatest challenge in this case was to “dislodge another from his social space, either temporarily or permanently” (Van Eck 1995:166).

#### **4.2.2.2 Shame**

Shame was another main value in the first-century Mediterranean society that sanctioned social behavior (Van Eck 1995:166). A shameless person in this regard, refers to a person who has a dishonorable reputation beyond any reasonable doubt; a person who is outside the acceptable standard of moral life and as such, such a one is denied normal social courtesies (Van Eck 1995:166). Shame was considered foolish and immoral in this part of the world, thus showing respect or giving courtesy in any form to a person coming from a shameless family, clan or group e.g. prostitutes, inn owners, impoverished, those considered unclean (maybe because of an ailment) was considered abnormal (Van Eck 1995:166).

In the first-century Mediterranean society, shame operated in two significant spheres; political and social. In this society, political shame was perceived through strong held

beliefs. For instance, in this period there was a strong belief that it was shameful to be captured by an enemy. During war, captors undressed their captives as a symbol of rendering captives defenceless, and they scorned them as a way of shaming them (Van Eck 1995:168). Social shame was perceived through social appearance of a person or group of people. Since the first-century Mediterranean people were group oriented (dyadic), their identity depended upon such groupings' perception of issues and this was somehow influenced by external social appearance and their social stratification (Van Eck 1995:168).

#### **4.2.3 Personality: Dyadic, not individual**

The personality of the first-century Mediterranean people was dyadic and not individualistic. Dyadic is a Greek concept that means pair or twosome. First-century Mediterranean people were group oriented; they lived and acted in groups (Neyrey & Malina 1991:74). Usually, dyadic people think in a stereotyped way; they act according to gender based honor and shame, follow a proper order that is socialized, and receive moral exhortation that is commonly known. A stereotyped person also poses a fixed kind of mentality which makes them affixed to a standard or judgment that is unchangeable (Shively n.d.: 10). It is for this reason that dyadic people are predictable. They have no control over where they belong (clan, village, lineage, parentage) and look at their *state of affairs* as ordained by God (Van Eck 1995:178). A dyadic community poses an in-built resistance towards people who intend to change their status, their roles or social mobility (Neyrey & Malina 1991:76).

Groups or people with dyadic personalities need others continually in order for them to understand themselves. This was the case with the first-century Mediterranean people who were individualistic (Van Eck 1995:176). As such, the first-century Mediterranean people never comprehended individualism; they shared “an undifferentiated family ego mass” (see Bowen, in Van Eck 1995:176). What is implied by this statement is that these people were always part of a group (clan, village, institution) in which they were naturally placed. As such, “first-century Mediterranean people cannot be without the existence of groupings in which they were naturally inserted” (Malina & Neyrey 1991:73). What is

implied by this hypothesis is that these people looked at themselves with lenses of interrelatedness. Even though they were “single beings, individual and unique in their being, their psychological ego reference is primarily aligned to some group.” This means that each person’s responsibility in this society was owed to the group’s morality or defiance (Van Eck 1995:176).

#### **4.2.4 Socio-political milieu of the first-century Mediterranean world**

Some scholars describe the first-century Mediterranean society as an advanced agrarian society. By agrarian society they imply that this society was an aristocratic society which was divided into two classes of people; the haves (ruling class) and the have-nots (the ruled) (Van Eck 2014:37). During the first century (from 63 BCE), the entire Mediterranean world was under the rulership of the Roman Empire. The Romans ruled Palestine as well as most of the Mediterranean nations. The emperor was the overall ruler, while the aristocrats ruled on his behalf. It is approximated that the rulers (elite) made up 1 to 2 percent of the population and lived in cities (urban), while have-nots (mostly peasants) comprised of the rest of the population and lived on the periphery of society (rural areas). These peasants depended upon patrons for their survival (Van Eck 2014:37).

The livelihood of the majority in Palestine during the Roman rule was shaped by the minority (elites) who determined the quality of life for the entire population (Van Eck 2011:60). There was “no legitimate channel for political participation by the peasantry” in this society (Van Eck 2014:38). Instead, the Roman government forced people to pay a variety of taxes. The main taxation was a tribute which was considered a permanent tax levied on all inhabitants of the conquered lands. Other than that, the citizens had to pay for administrative and military services (Reinstorf 2004:336). Furthermore, there was tax imposed on land, crops, cattle and personal property too. In addition to these taxes there were also wreath taxation that had to be paid on the birth day of the Hellenistic kings and later to the emperor, salt taxation on which the emperor had ultimate control, sales tax and judicial fees on all trade. Taxation in the Roman Empire was the norm. Jews were further expected to pay religious taxes; which included the temple tax, the obligations of

wood to burn at the altar, the offering of the first fruits of the crops, grain offerings and the tenth of the tithe to be paid by the Levites to the house of God (Reinstorf 2004: 340).

In the first-century Roman Empire chronic indebtedness was the norm of the day for the majority of people. This exploitative scenario subjected the poor to “brutal compulsion and oppression” (Oakman 2008:25). For example, in Palestine, due to high indebtedness, many poor people became landless; control and tenancy of land was a privilege of the few wealthy individuals (Batten 2009:146).

#### **4.2.5 Socio-economic milieu of the first-century Mediterranean world**

The socio-economic value system of the first-century Mediterranean society hinged on the notion “limited good.” This notion is essential in understanding what was meant by “poor” or “rich” in this society (Malina & Rohrbaugh 2003:400).

##### **4.2.5.1 Poor, rich and limited good**

###### **4.2.5.1.1 The poor**

The concept “poor” in the first-century Mediterranean society was not only limited to economic conditions. Poverty in this society was perpetrated by social misfortunes. Hence, to be poor meant that somebody was not able to maintain his/her inheritance such as honor due to injustices perpetrated by others (Malina & Rohrbaugh 2003:400). This is because “even if one were economically poor, as indeed the vast majority of humankind in antiquity was, cultural attention would remain riveted on honor rating rather than goods” (Malina & Rohrbaugh 2003:400). As a result of this *state of affairs*, to be poor meant that somebody was unable to defend his/her inborn status, that is, somebody who failed to defend the status he/she was born with. Poor people in the first-century Mediterranean society also included the lame, blind and maimed. These people were rendered poor because of social, political, economic and religious reasons. They remained poor regardless of how much land or resources they had. In short: impoverishment in the first-century Mediterranean society was not only limited to economic factors, but included social misfortunes as well (Malina & Rohrbaugh 2003:400).

#### **4.2.5.1.2 The rich**

The concept “rich” was a multifaceted concept in the first-century Mediterranean society. In this society to be rich meant that someone was very powerful and acquired power through unjust means. Consequently, power in this society brought wealth (Malina & Rohrbaugh 2003:400). For example, the elite in the first-century Palestine “shaped the social experience of the empire’s inhabitants, determined the ‘quality’ of life, exercised power, controlled wealth, and enjoyed high status” (Van Eck 2014:37).

#### **4.2.5.1.3 Limited good**

In the first-century Mediterranean world it was believed that goods existed in limited supply. As such, one’s personal or family gains were perceived to have been accrued at the expense of another (Malina 1993:95). This perception threw the entire society into struggles and suspicions among people, especially the majority peasants who were in constant want. This situation condemned many poor people into perpetual dependence syndrome, and pushed people to aspire for an increase in their economic or social livelihood. The implication behind such an arrangement was that “any apparent relative improvement in someone’s position with respect to any good in life is viewed as a threat to the entire community”. The poor depended on some kind of alliance with the rich, and as such they became susceptible to manipulations and exploitations (Malina 1993:95).

In view of the above, the economic reality of the first-century Mediterranean society restricted people’s aspirations for an improved livelihood. Furthermore, this economic reality (limited good) also prevented the idea of promoting wealth for all. It is common knowledge that economies that operate like this avoid a market economy. The values of people in such societies are measured by honor and shame, rather than market value indicators (Malina 1993:95). For this reason, the rich are viewed as “greedy” and shamelessly strong, while the poor as the “socially misfortune” and “socially weak”; who cannot be given a grant of honor (Malina & Rohrbaugh 2003:401).

### **4.3 SOCIAL-SCIENTIFIC ANALYSIS OF LUKE 4:16-30**

Luke 4:1-16 indicates that Jesus in his ministry was under the guidance of the Holy Spirit. We also learn that his reputation had reached the entire Galilee region. Furthermore, we learn that Jesus used synagogues as his place for preaching and teaching. Luke 4:15 clearly states that Jesus was in the synagogue in Nazareth and that Jesus had the habit of attending worship in the synagogue.

#### **4.3.1 Jesus ministers at home**

In Luke 4:16-30, Luke refers to Nazareth as Jesus' home. This is in contrast with Luke's reference to Bethlehem as Jesus' birth place in Luke 2:4; a text that is the fulfilment of the prophecy in Isaiah 9:5. It is important to take cognizance of the fact that Nazareth was Jesus' home of upbringing as a son to an artisan. Taking note of this information is important because this information gives us the impetus to delve into the narrative and subsequently understand what motivated Jesus to take a preferential option and stand in solidarity with the poor and the marginalized.

Luke 4:16-30 follows previous narratives that have shown Jesus' ministerial prowess prior to his Nazareth incidence; his temptation in the desert (Luke 4:1-12) and the report that indicates that prior to coming to Nazareth, Jesus had already ministered in Capernaum. By the time he was coming to Nazareth he was already in the limelight and was considered as a renowned teacher throughout the Galilee region.

At the time of Jesus, Nazareth was one of the cities in the Galilee region. Galilee was a client kingdom of the Roman Empire. The ruler of this region was either a governor or client king. During the time of Jesus' ministry Galilee was under the leadership of Herod Antipas. During Herod Antipas' reign Tiberius and Sepphoris were the important economic and political hubs of the region. The elite and the governor presided over the region on behalf of the Roman emperor (Brawley 2011:2). The land belonged to the Roman emperor and its inhabitants had a right to own ancestral land which they acquired through inheritance. However, in certain circumstances aristocrats' confiscated land from peasants for failure to pay debts and taxes which normally accumulated due to various



taxes which peasants were supposed to pay to the Roman government (Van Eck 2014:37-38). In the spirit of maintaining a patron-client structure land grabbed from peasants was later rented to them (Brawley 2011:2). Thus, it was very difficult for the peasant to go up in the social stratification, because it was destined that a person born out of a client (peasant) lineage and together with his/her offspring were expected to remain within that status (Brawley 2011:2). Hence, it is very likely that peasant always remained stagnant or plunged even further downward in their social strata rather than moving up. Jesus having grown up in a family of parents who were artisans (peasant), he might have felt the social, cultural, economic and political hardships of that society, and this compelled him to stand in solidarity with the less privileged.

It is imperative that we read what Jesus said in his mission statement in the light of the social issues and values at the time of Jesus. The solidarity Jesus exhibited for the poor and the marginalized in Luke 4:16-30 rose out of his experiences in that society. In short: Jesus' preferential option for the vulnerable was motivated by his experiences as a son of the peasant (Brown 1984:102; Saracco 1982:57).

#### **4.3.2 Patronage in Luke 4:16-30**

In Luke 4:16-30 we see Jesus being handed the scroll from Isaiah, where he read three (3) verses from the prophet Isaiah's book (Isa 6:1; 1-2a and 58:6b). These verses are commonly referred to as the "mission statement" or "the manifesto" of Jesus. What follows after this manifesto is the homily "today this scripture has been fulfilled in your hearing."

The centre of Jesus' homily was patronage. The patron-client relationship characteristics presented above are prevalent in Luke 4:16-30. In this text, God is presented as a patron, Jesus as the broker, and the human beings (blind, poor, captives and the lame) are the clients (Malina & Pilch 2006:384-385). People, who were privy to the patron-client system, hearing Jesus' claims, might have made comparisons between Isaiah's prophecy and the patronage system which was widespread in that society. By merely claiming that these words are fulfilled, Jesus was imposing himself as a patron for the poor, the captives, the blind and the oppressed (Malina & Pilch 2006:384). However, we need to take note that

there is a difference between patronage that Jesus claimed to initiate and that which was in practice in the Roman Empire. In Jesus' patronage model there is no notion of "reciprocity", which was an integral part of patronage that was in practice in the first-century Mediterranean society. What we see in Luke 4:19 is brokerage as a kind of patronage. In this scenario Jesus presents himself as a broker or mediator of God's patronage, who proceeds to broker the favor of God through the spirit of God (Malina & Pilch 2006:385).

### **4.3.3 Reciprocity and patronage in Luke 4:16-30**

Reciprocity in the first-century Palestine operated in three distinct forms: generalized, balanced and negative. Reciprocity, when applied to the patronage system, operates in balanced form, even though it also spills over into negative reciprocity depending on circumstances (Van Eck 2011a:5-6). For example, as has been alluded to earlier, the elite and aristocrats controlled all spheres of human endeavours in first-century Palestine by maintaining oppressive values. For this reason, the elite became rich patrons through competing against each other with regard to the number of clients one had. The guiding principle in this case was that the more clients one had the more riches that person accrued. Therefore, to hear Jesus making a statement with regard to the release of the poor, captives, blind and oppressed being fulfilled, for a citizen of the first-century Palestine, it meant that Jesus was making an attempt to win clients and increase his honor.

The marginalized people mentioned in Jesus' mission statement (Lk 4:18-19) were victims of balanced or negative reciprocity and the exploitation of the patronage system of their time. Most patrons in this society were bent on exploitation rather than developing their clients (peasants). Overwhelming evidence attests to the fact that peasants were heavily taxed and for them to pay these taxes they resorted into getting loans which in the end accumulated to unbearable levels and indebtedness made peasants captives and prisoners of the elite (Van Eck 2011b:60). This exploitative situation was perpetrated to a greater extent by the imperial system, in which the emperor was regarded as a chief patron and his subjects as his clients. Thus, due to the oppressive system of Rome, the

poor, the captives, the blind, and the oppressed had no capacity whatsoever to change the system (Van Eck 2011b:60-61).

In view of the above, it is clear that Jesus' pronouncement of "release" in Luke 4:16-30 had political implication attached to it, which was very appealing to the marginalized and relief at the same time (Brown 1984:97).

#### **4.3.4 Rich, poor and limited Good in Luke 4:16-30**

In Jesus' mission statement (Lk 4:18-19), the poor people are offered "good news" and the dawn of the "year of the Lord's favor". The poor, the captives, and the oppressed who are mentioned in the mission statement were probably rural peasants who were in most cases not able to pay their debts and taxes which they owed their patrons and the Roman government. In this society indebtedness and poverty in the periphery (rural) was mainly caused by factors such as peasants having a large number of dependents to take care of since in the first-century Mediterranean world people were group oriented and lived communally (Shiveley n.d.: 10). Impoverishment was also caused by natural calamities such as drought and high taxes imposed on the peasants by the government (Wright 1997:168). These circumstances led peasants to accrue seed loans in order to sustain their livelihood, and as a result of these challenges peasants remained perpetually poor, because whenever they failed to pay back the loans, they gave away their land to patrons as payment for their debts (Wright 1997:168).

The peasants' perception in the first-century Mediterranean society was centered on the notion of "limited good". This means that peasants always looked up to somebody to move them out of their situation, and this had an adverse effect on the order of the village. Furthermore, these people perceived things with "honor" as lens; for them an honorable person was somebody who had interest in things that belonged to him/her legally or rightfully (Malina 1993:95). Thirdly, they labelled any poor person as someone who failed to defend his family or him/herself from exploitation (Malina & Rohrbaugh 2003:400). In this society, if a person was labelled poor it meant that that person had no capacity to defend his/her inheritance such as land due to an ailment or disability such as leprosy or

blindness. Thus, poor people regarded rich people as greedy people, because the rich (patrons) in most cases acquired property and resources which belonged to other people (clients). In extreme cases they aspired even for more possessions which included land, money, honor, and favor at the expense of the poor (Malina & Rohrbaugh 2003:400).

Jesus' mission statement (quoted from Isaiah), when read and interpreted in the light of the picture painted above, gives new meaning to Isaiah 61:2 and 58:6. The words Jesus recited in the synagogue, even though they were meant for Isaiah's context, were transformed to suit circumstances which were prevalent at the time of Jesus' Galilee (O'Day 2006:360). Jesus' interpretation of the text "today this scripture has been fulfilled in your hearing" did not imply that he was replicating the past meaning of the text he quoted, but that he was recreating the text to apply to the present situation (O'Day 2006:360). His interpretation was first appreciated by the people in the synagogue, and they appeared prepared to grant honor to Jesus' words, but later a question arose "is this not Joseph's son"? Implying that how could such honorable teaching come from one born to a person of low status (a peasant)? Here we can see that there was resistance to change among the people, partly because it is common knowledge that such resistance was motivated by people's understanding of honor and shame (Malina & Rohrbaugh 2003:243).

#### **4.3.5 Honor and shame in Luke 4:16-30**

In Luke 4:25-30 Jesus' honor is being questioned when people say "is he not the son of Joseph (artisan)?" The honor that is in question is acquired honor. Acquired honor refers to the kind of honor which a person inherits by virtue of being born in that which had already been achieved; honor that was equivalent to wealth. The other type of honor is ascribed honor, which refers to the kind of honor that one attained through achievements, for example, a person that rises to the position of Rabbi (Shiveley n.d.:4). As it was expected that an honorable person must be in a position to defend his honor, in Luke 4:25-27 we see Jesus defending his honor when his social status was questioned. In his response to the challenge, he quoted the scriptures from 1 Chronicles. 17:1; 9; 18:1; 2 Kings 5:1, 14 Jesus responded in this manner, knowing that one was expected to

establish links with the public to accrue social, economic and political benefits by defending his honor.

#### **4.3.6 Honor and shame and violence**

In the first-century Mediterranean world any form of resistance in the honor and shame arrangement attracted violence (Shivley n.d.:4; Malina & Rohrbaugh 2003:244). This is evident in Jesus' case (Lk 4:25-27). His response to people's resistance to grant him honor attracted violent reactions. Even though Jesus' response was somehow convincing because of his reference to Scripture, members of the synagogue regarded the response as a negative challenge to them and the village. Therefore, the response was met with violent reaction (Lk 4:28-29). This violence emanated from the fact that the public admitted their failure. As usual, anyone ashamed resorts to some form of reaction. But in this case, people failed to succeed with their intention of throwing Jesus off the hill, maybe because they were ashamed completely by Jesus' message and his usage of scripture as a method of interpreting the context (Malina & Rohrbaugh 2003:243-244).

#### **4.4 CONCLUSION**

This Chapter presented a social-scientific analysis of Luke 4:16-10. The social milieu of the first-century Mediterranean world was been explored, and the conclusion reached is that in the first-century Mediterranean world people were formed by the elements and values that were dominant of that society. The first-century Mediterranean world was under the rulership of the Romans. It was an agrarian society which was divided between the rich and the poor. This *state of affairs* was fuelled by the dominant elements such as patron-client relationships, and values such as honor and shame. It has been established that honor and shame, patronage, personalities were dominant elements and values that formed that society.

Luke 4:16-30 has been analysed in the light of the social issues and values of the first century Mediterranean society. In this analysis, it has been established that, Nazareth was Jesus' home of upbringing as a son to an artisan. Jesus having grown up in a family of parents who were artisans (peasant), he might have felt the social, cultural, economic

and political hardships of that society, and this compelled him to stand in solidarity with the less privileged. The centre of Jesus' homily in the Synagogue was patronage. The patronage that Jesus claimed to initiate was different from the one which was in practice in the Roman Empire. In Jesus' patronage model there is no notion of "reciprocity", which was an integral part of patronage that was in practice in the first-century Mediterranean society. Thus, what we see in Luke 4:16-30 is brokerage kind of patronage. In this scenario Jesus presents himself as a broker or mediator of God's patronage, who proceeds to broker the favor of God through the spirit of God. Furthermore, the marginalized people mentioned in Jesus' mission statement (Lk 4:18-19) were victims of balanced or negative reciprocity and the exploitation of the patronage system of their time. Due to the oppressive system of Rome, the poor, the captives, the blind, and the oppressed had no capacity whatsoever to change the system. This means that peasants always looked up to somebody to move them out of their situation, and this had an adverse effect on the order of the village. Jesus' mission statement (quoted from Isaiah), when read and interpreted in the light of the experiences of the first century society, gives new meaning to Isaiah 61:2 and 58:6. The words Jesus recited in the synagogue, even though they were meant for Isaiah's context, they were transformed to suit circumstances which were prevalent at the time of Jesus' Galilee.

# Chapter 5

## An overview of poverty in Zambia

### 5.1 INTRODUCTION

This Chapter gives an overview of the poverty situation in Zambia. To begin with, the Chapter looks at the definition of poverty in the Zambian context. It provides a vivid picture of the poverty situation and its causes in Zambia, looking at its geographical-, economic-, cultural-, and demographic factors. Additionally, the Chapter discusses the impact of poverty upon the livelihood of Zambians and the measures being put into place to alleviate the poverty situation.

### 5.2 POVERTY SITUATION IN ZAMBIA

Poverty is one of the pervasive challenges being faced by many Zambians today, despite the country being endowed with numerous natural resources. Poverty is a social crisis with which many Zambians have been denied access to minimum descent livelihood. According to the latest Jesuit Center for Theological Reflection (JCTR 2016) monthly food basket survey report, in Zambia it has become more and more difficult for many people to meet the basic necessities of life such as food, shelter, clean water, sanitation and clothing due to the rising cost of essential commodities, while wages remain static (JCTR 2016). One wonders why the situation has remained so pathetic 50 years after independence from colonial masters. In order to find answers to this puzzle, it is imperative that we first define the concept of poverty, that is, to uncover the underlying ideas that underpin it in order to address the specifics. A definition of poverty is necessary because it is against such a definition that a description of poverty in Zambia will be given.

#### 5.2.1 A definition of poverty

Poverty is a multifaceted phenomenon which cannot be defined by a single word or sentence. Poverty manifests in many forms, thus when attempting to define it, it is important to be precise by addressing specifics. Currently, there are considerable disagreements on the definition of poverty or how it ought to be defined. For instance,

Landerch, Saith and Stewart (2003) have suggested that the definition of poverty should include the following;

1. Approaches that attempt to measure individual deprivation, based on monetary income or on indicators of capability failure
2. Approaches that are based on concepts of social exclusion
3. Approaches that rely on participatory methods to establish views of the poor themselves

Although these approaches seem to cover essential aspects of what poverty is all about, it is important to note that these approaches contain both positives and negatives depending on the aspect of poverty that one intends to highlight. To begin with, these approaches are formulated from different conceptions of what is meant by poverty and they are also different in their implications depending on who is being targeted (Saith *et al.* 2003).

In certain instances, poverty has been defined on the basis of economic indicators (see Chibuye 2011:1). The measurement of poverty using economic indicators has been associated with the late 19<sup>th</sup> century British social reformers Booth and Rowntree. These two reformers defined poverty using the concept of “Primary Poor”. Booth and Rowntree define poverty as a situation in which people’s (the poor) “total earnings are insufficient to obtain the minimum necessities for maintenance of merely physical efficiency” (Chibuye 2011:1). From this definition, one can see that right from the initial conception of poverty, its definition has been based on the income of an individual or a group of people. To this day, income has remained the core of the concept’s meaning. In market-based economies the lack of income is highly correlated with other causes of poverty; income is used to predict future deprivation (Chibuye 2011:2). In this case, people are perceived to be poor when they lack or are denied income and other resources; when they are deprived of their assets, receipt of goods and services that sustain them such as food, amenities and standards that make them participate in relationships and customary behavior which is expected of them by their being members of a particular community. In this particular instance, deprivation is understood to be the cause of their state of poverty (Wratten 1995).



Consequently, such an understanding and measurement of poverty is mainly associated with the relatedness of “income” and “deprivation”. For instance, the World Bank conceptualizes poverty in an international context, whereby the bank measures poverty by settling out poverty lines with the minimum income based on the income that one needs to have in order to meet basic needs like food, shelter and water and sanitation. Currently, the Bank has set the minimum income per person at \$1.50 (US) per day (Chen *et al.* 2008:10). Many scholars have criticized the Bank’s conventional method of measuring poverty because of its approach of taking income as a means of measuring welfare (Chibuye 2011:2). Defining poverty using poverty lines is problematic because poverty lines use income as a basis for their definition. Income is only useful when used as an indicator to calculate the number of people who will lack resources to meet an acceptable standard of living (Chibuye 2011:2). Such an approach does not measure accurately the capacity which poor people require in order for them to access goods and services.

Amartya Sen (1983:167), who seem to have been motivated by criticisms such as the ones above, has developed an approach to define poverty which he calls the “capabilities approach”. This approach looks at poverty as a state of being absolute in the space of capabilities. Capabilities, in this case, refer to universal human needs such as nutrition, education, human dignity and participation in society. Therefore, when Sen talks about people’s capabilities he refers to

The alternative combinations of functioning that are feasible for [human beings] to achieve. Capability is thus a kind of freedom; the substantive freedom to achieve alternative functioning combinations (or, less formally put, the freedom to achieve various lifestyles).  
(Sen 1999:75)

Sen’s definition of poverty has been adopted by some countries in their understanding and measurement of poverty. For example, the South African Statistical department has adopted Sen’s definition and this has enabled the country to define and measure poverty in a much broader way than merely measuring it in terms of the extent of low income or low expenditure in the country. In the South African context, poverty is seen as being

characterized by the inability of people or individuals, households, and communities to command enough resources to satisfy their daily needs, in line with the minimum acceptable living standards (Statistics South Africa 1998:6).

Furthermore, internationally, a more specific and agreeable concept of understanding and measuring poverty has been arrived at. The world summit for social development that convened in Copenhagen in 1995 described absolute poverty as

a condition characterized by severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information. It depends not only on income but also on access to social services.

(Gordon 2002:59)

The World Bank has also recognized the need for an exclusive focused definition and measurement of poverty because they have seen that focusing on income is not enough. Hence, they have opted for an alternative empirical approach (Chibuye 2011:2). Beginning in 1993, when the Bank started conducting poverty assessments, the approach was based on finding information about income and expenditure based on poverty lines which were designed by the Bank (Kanbur & Squire 2001). However, the Bank's approach in recent years has shifted to Poverty assessment in a much broader way, with interactive and quantitative characteristics which allow people to describe what constitutes poverty in any dimension chosen (Kanbur & Squire 2011). According to the World Bank, poverty "is pain; it is like a disease, it attacks a person not only materially but also morally. It eats away ones dignity and drives one in total despair" (World Bank 2000).

In view of the above, one can appreciate that there is an agreement generally on the scientific definition of poverty which encompasses both low income and limited capabilities to fulfil universal human needs. Perceptions about the nature of poverty are central in deciding how best poverty can be measured, analysed and later on defined (Wratten 1995). In interrogating the poverty situation in Zambia, this Chapter will adopt an expanded definition of poverty which embraces all dimensions as discussed above. According to the Ministry of Community Development and Social Welfare (MCDSW) in the Zambian context, poverty is defined as follows:

Deprivation of long healthy life, educational opportunities, access to resources for a decent standard of living (e.g., income and consumption, housing, health, clean and [safe] water and sanitation) and lack of freedom to access choices and participate in society.

(MCDSW 1998)

In spite, the definition of poverty given above one would hardly understand the poverty situation in Zambia and its causes unless one has an understanding of Zambia as a country.

### **5.2.2 The geographical location of Zambia**

Zambia is situated in the sub-Sahara region of Africa. The country has a total surface area of approximately 252,614 square kilometres. Zambia is one of the smallest countries in South-Central Africa. The country lies between 8<sup>0</sup> Celsius and 18<sup>0</sup> Celsius south latitude and longitudes 22<sup>0</sup> Celsius and 34<sup>0</sup> Celsius east. Zambia shares its borders with countries such as Malawi, Zimbabwe, Angola, Mozambique, the Democratic Republic of Congo (DRC) and Tanzania (IFAD 2014).

### **5.2.3 Natural resources**

Zambia is situated on the great plateau of Central Africa. The vegetation of the country is mainly that of savanna woodlands and grass lands. There are three distinct climatic conditions that are experienced in Zambia; the dry and cool season, the hot and dry season and the hot and wet season (IFAD 2014). Zambia is endowed with abundant natural resources ranging from water, untapped arable land, wildlife, and minerals. Almost 40 percent of fresh water in the sub-Sahara is found in Zambia. This water is supplied by five main rivers; the Zambezi, Kafue, Chambeshi, Luangwa, and Luapula. In addition to these rivers, the country has natural lakes such as Mweru, Mweru-Wantipa and Tanganyika, and man-made lakes (Kariba and Itezhi Tezhi; IFAD 2014). Other natural resource includes the Victoria Falls, one of the seven natural wonders of the world. Zambia has the best natural wildlife and game reserves which afford the country with potential for huge foreign exchange earnings through the tourism industry. The two national parks in Zambia, namely Luangwa and Kafue, are homes to one of the largest

animal population in Africa. Lastly, Zambia is endowed with various minerals and precious stones such as copper, cobalt, emeralds, zinc and lead (IFAD 2014).

#### **5.2.4 People and culture**

Zambia is home to more than 73 ethnic groups and is sparsely populated with a population of approximately 15 million. The country's population has been growing at a rate of 1.3 percent since 1990. Zambia's population growth rate has reduced from 1.5 percent due to high child mortality rate and the spread of HIV/AIDS. The 1980, 1990, 2000 and 2010 censuses estimated the population of the country respectively at 5.7, 7.8, 9.9 and 10.5 million (World Bank 2014).

Zambian people are within the Bantu-language family sparsely populated into 73 ethnic groups. However, only seven languages are widely spoken in the country: Nyanja, Bemba, Tonga, Luvale, Kaonde, Lunda and Lozi (Simon 1985:1). Thus, the ways in which individuals relate to each other in respective communities sets out some form of grouping or communities apart from others.

Individuals in Zambia belong to a particular household, extended family, village, a neighborhood, perhaps a clan or formal political system of chieftainship, an informal political system of prestige and influence and a set of state administrative structure.

(Simon 1985:3)

Accordingly, each of the mentioned institutions presses upon an individual Zambian some sort of demands which regulates behavior and gives an individual certain roles.

In Zambia, the word family goes beyond a mere description of spouses and their offspring. Family in Zambia means an extended family which encompasses several generations (Simon 1985:3). In rural areas, for instance, a family includes "heirs of living elders, the corporate property-holding unity and co-operative work group." Generally, a child in a village belongs to the community, meaning that a child can stay with an aunt, uncle, cousin or any relative. Social structures in Zambia include two modes of groupings; people are organized in either lineage or clan (Simon 1985:3).

### 5.2.5 Economy

Zambia's economy is largely dependent on copper and cobalt mining. Copper is the mainstay of the economy, meaning that it is the largest commodity that is produced in and exported from Zambia. Copper accounts for 80 percent of the exports that come from Zambia to other countries. However, due to the unstable copper prices of world market since 1975, the exportation earnings from copper have been unstable. This decline has partly contributed to the poor performance of the Zambian economy which to a large extent depends on importations of raw material and capital items (IFAD 2014). The decline in copper earnings has also affected the country's balance of payment which relies heavily on the mining sector. Even though there are additional sources of foreign exchange earnings that come from non-traditional exports, Zambia pays more to other countries in terms of imports than it earns from exports and this has contributed to the poor balance of payment (IFAD 2014).

Zambia became a sovereign state on 24<sup>th</sup> October 1964 after getting independence from Britain. The first republican president was Dr. Kenneth David Kaunda. Kaunda advocated for an egalitarian society based on African values. The country's ideology then was humanism, which was anchored on the belief that humanity was supposed to be at the center of development (Chikulo 1985). During this period, the country received unprecedented support from the international community from 1964-1970's. As a result of this, resounding support coupled with favorable copper prices at the world market, the country recorded positive economic growth because of sound foreign exchange earnings, which enabled Zambians to have access to free education, health and other social services (Chikulo 1985). However, due to the world economic recess in the 1970's, the fortunes of the country diminished and the situation worsened due to the fall in copper prices at the international market coupled with maladministration of the economy and political misrule (Henriot 2000:39).

Poverty levels skyrocketed between 1980 and 1990 and the country experienced tough times. Consequently, by the end of the 20<sup>th</sup> century, Zambia was ranked among the poorest countries in the world. The United National Independence Party (UNIP)

government tried to put measures in place to mitigate the impact, but failed to arrest the external factors (exchange rates, low copper prices and high prices of oil) that caused the havoc. The pressure was too much for the government to handle (Pearce 1994:86-97; Henriot 2000:39). The government (UNIP) tried to seek the intervention of the International Monetary Fund and the World Bank, but the country could not carry out the reforms as stipulated by the two institutions, and this resulted in the economic devastation. During this period, the country's debt rose to unbearable levels. By 2004, Zambia's debt accumulated to the tune of approximately US \$7.1 billion (Jubilee Zambia 2005:2; Henriot 2000:43).

Many Zambians were discontent with the performance of the United National Independence party. In 1991, a new government, under the leadership of the Movement for Multiparty Democracy (MMD), was elected into office. During the reign of the MMD, Zambia embraced an open, private sector led economy with minimal participation and control of the state (Henriot 2000:40; Sakala 2001:16). In order to address the poverty situation, in 1991, the Zambian government adopted the Structural Adjustment Programme (SAP) that was imposed by the International Monetary Fund (IMF) and the World Bank (Henriot 2000:41). The main reason the country adopted this program was to create a stable micro-economic situation. Through this strategy, the government undertook measures such as "liberalization of trade, prices, interest and foreign exchange rates, removal of subsidies, privatization, reduction in public expenditure, public sector reforms and liberalization of the marketing and pricing of agriculture products" (Henriot 2000:41).

There are both positive and negative results that came out of the economic structural adjustment program which Zambia adopted. However, the negative impact outweighs the positives. The Catholic Bishops from Eastern and Southern Africa, during the 1994 Synod, observed that the Structural Adjustment Programme made people poorer than ever. This is certainly true in the Zambian situation. For example, in the quest to privatize government parastatals, the Zambian government then (MMD) literally mortgaged the country, and this has resulted in high poverty levels in Zambia today. This was caused by

government's failure to follow guidelines which were laid down. Some companies that belonged to the state were stripped off assets by unscrupulous individuals who posed as investors (Chimfwembe 2013:130). During privatization almost 19 state-owned companies were sold off, 20 000 public sector workers were laid off, with another 30 000 retrenched. As a result, the living standards of most Zambians deteriorated (Chimfwembe 2013:130). Furthermore, since the liberalization of the economy, Zambia has been turned into a dumping ground of all sorts of goods from other countries. This state of affairs has undermined the manufacturing industry. When liberalizing the economy no controlling measures were put in place to ensure the protection of the local manufacturing industry (Chimfwembe 2013:130).

Additionally, unrealistic concessions were made to investors, whereby investors have been offered tax exemptions and other incentives for a period of five years upon venturing into any form of business (Chimfwembe 2013:130). The implication of such a policy is that within the five-year tax exemption period foreign companies such as Game, Pep Stores, and Shoprite are allowed to import goods into the country without paying tax. This has led to the importation of nearly everything that is sold in these shops ranging from tomatoes, onions and vegetables from countries such as South Africa, things that could have been sourced locally (Chimfwembe 2013:30).

The economic structure of Zambia has seen little change in spite the state liberalizing the economy. The country's economic growth has remained average despite pronouncements that the economy of the country has been growing. There is nothing to show for such pronounced economic growth in terms of uplifting people's welfare (World Bank 2014).

### **5.2.6 Poverty**

According to the United Nations-Human Development index (UN-HDI) standards, Zambia ranks number 163 out of 187 countries in the world. The country is counted among countries that have a low human development capacity. The Human Development Index for Zambia has remained at 0.448 since the year 2012 (UNDP 2013).

From 1964 to the 1970's Zambia was classified as a middle-income country; its GDP was at *par* with that of South Korea. Nevertheless, due to three decades of economic decline and neglect in infrastructure and service delivery the country has degenerated into an extremely poor country (Chimfwembe 2013:135). It is estimated that approximately 60.5 percent of 15 million Zambians live in abject poverty. This percentage is subdivided as follows: 42 percent consists of people that are extremely poor while 18.5 percent are moderately poor. In absolute terms, one would say 7.9 million Zambians live in extreme poverty without sufficient resources to meet their day to day needs, while 5.5 million live in moderate poverty (IFAD 2014; GRZ 2010).

Why are many Zambians poor despite living in a country with plenty natural resources; water, arable land good for agriculture production, mineral resources, a manageable population with a rich cultural heritage from 73 ethnic groupings living in harmony in a Christian democratic country? It remains one of the extremely poor countries in the world. In order to find answers to this puzzle, it is important that we understand who the poor people in Zambia are.

#### **5.2.6.1 Who are the poor people in Zambia?**

Joan Purcell, in her book *Vision change: A Caribbean perspective*, classifies poor people in three distinctive categories:

The indigent poor, those who are deprived of basic necessities, the oppressed poor who are the powerless victims of human injustice, and the humble poor who acknowledge their helplessness and look to God to supply their needs

(Purcell 2011: xxx-xxxi)

Purcell's classification and categorization of poor people apply when poverty is discussed from a Zambian perspective.

##### **5.2.6.1.1 The humble poor**

The humble poor in the Zambian context refers to symbolic poor people who do not believe in poverty as an actual entity, but instead regard poverty as a symbol of spiritual incapability which requires the intervention of God. For example, the Zambian



government called for national prayers to pray for economic challenges on 28<sup>th</sup> October 2015. The evangelical fellowship of Zambia supported this cause and pioneered the preparation for the national day of prayer. Their argument was that poverty in Zambia can only be solved through the intervention of God (The Post, 2015).

#### 5.2.6.1.2 The indigent poor

In Zambia, the indigent poor are people who live on less than a US dollar per day. These people have challenges in meeting and accessing day to day basic human necessities such as food, shelter, clothing and water and sanitation.

The World Bank (2014) has calculated the dollar value for poverty stricken individuals in Zambia. The report describes an extremely poor person in Zambia as somebody who lives on less than a US dollar per day. For example, it is estimated that in Zambia an extremely poor person lives on 0.68 dollars, or 20.52 dollars a month.

When one looks at the pattern of consumption in Zambia, it becomes clear that there is a huge difference between the rich and the poor in terms of what they consume. For example, if we compare the livelihood of the poor people's household in the rural area with the high cost household in the urban area in Zambia, the trend shows that there is a huge gap in terms of livelihood (Marcio & Nsemukila 2013:45). In this case, the 2012 Central Statistical Office report indicated that in 2012 80 percent of the population living in rural small scale properties were poor, and only 7 of the population living in urban high-cost households are rich (CSO 2012a). The report gives the following consumption pattern.

#### Comparison of consumption patterns between rich and poor households (2010)

	Food	Housing	Clothing	Education	Med/care	Remittance
<b>Poor families</b>	65.7%	15.7%	3.2%	10.5%	0.3%	0.3%
<b>Rich-families</b>	<b>28.8%</b>	<b>36.9%</b>	<b>2.6%</b>	<b>4.4%</b>	<b>0.7%</b>	<b>1.1%</b>

	<b>Personal services</b>	<b>Non-food expenses</b>	<b>Alcohol-beverages</b>	<b>Transport</b>
<b>Poor families</b>	6.1%	34.3%	1.2%	3.1%
<b>Rich families</b>	10.1%	71.2%	1.3%	8.0%

From the calculations above, it can be appreciated that poor households in Zambia spent a bigger share of their income on food. This *state of affairs* is expected because poor people earn less money than rich people, and more often poor people have more children and dependents (CSO 2012a). It is obvious that since poor people's resources are limited they spend it consciously so that they address priority needs first. On the other hand, rich people eat better because they have enough resources or higher income which makes them have access to better nutrition. Additionally, the rich have enough even to save for investment such as good housing and sanitation (Marcio & Nsemukila 2013:45). From the chart given above, we can see that rich people spend less on health because they live in a good environment and therefore their health is better. However, we can see that despite poor people moving in worse off environments, they too do not spend more on health because government subsidizes their basic health care by providing free access to medicines and hospitals (Marcio & Nsemukila 2013:45).

Richer households are able to spend much more on education for both adults and children, meaning that in the end they have access to good and decent jobs because of better qualifications. This translates into better opportunities. Those in poor household send their children to public schools where they are guaranteed free primary education, and at a later stage, they are expected to pay fees for a child to attend secondary and tertiary schools. In most cases, due to non-availability of resources, children from poor household end up dropping out of school at secondary and tertiary level. This translates into poor opportunities in future in terms of employment and livelihood (Marcio & Nsemukila 2013:45).

From the chart, we can also see that the share of alcohol beverages and tobacco is almost the same between the rich and the poor. It is of great importance to note that for the rich

alcohol is consumed for social recreation, leisure and entertainment purposes. For the poor it is often consumed for relief purposes; alcohol is considered to be a temporal relief from problems. In most cases this leads to alcohol abuse. It is common knowledge that alcohol abuse is always associated with vices such as sexual abuse, and gender-based violence which is so rampant in rural and peri-urban communities in Zambia (Marcio & Nsemukila 2013:46).

#### **5.2.6.1.3 The oppressed poor**

The oppressed poor in the Zambian context are those people whose human rights have either been violated or trampled upon culturally-, socially-, economically- and politically. Women and children form the majority of this group.

In Zambia poverty is not gender neutral; it impacts more on women than on men. Particularly in Zambia, poverty affects women more than men (Henriot 2000:50). It is common knowledge that “behind every statistic are millions of individual stories of poverty” (Linthicum 1991:7). Though billions of dollars and many working hours have been spent in trying to alleviate poverty throughout the world, the reality is that 80 percent of the world population consists of poor people (UNDP 2008:12). Over a period of 50 years billion dollars have been spent in trying to mitigate poverty with different development policies and theories, yet the levels of poverty are still escalating rather than decreasing (Sweetman ed. 2002:2). This is more evidenced in female-headed households, which have now drastically increased, partly due to HIV/AIDS pandemic, with an estimation of about one-third of these female-headed households being found in most parts of rural parts of the developing countries like Zambia (Elabor-Idemudia 1991:129).

The trend in Zambia in terms of statistics shows that there are not many differences between men and a woman in as far as poverty is concerned. It is estimated that on average 60.5 percent of the male population and 60.3 percent of females live in abject poverty in Zambia (IFAD 2014). However, women are said to be the most vulnerable in terms of health problems, violence and other deprivations and vulnerabilities (Marcio & Nsemukila 2013:49). What makes matters worse for women is that for them poverty may

not be abundant in terms of numbers, but culturally society puts a huge burden on them in terms of responsibilities such as taking care of the entire household single-handedly; they are involved in vending or menial part-time service (Marcio & Nsemukila 2013:49).

Women in Zambia are the major agriculture workers, they put in long hours in the fields after early morning domestic chores and before more domestic work when they leave for the fields (Henriot 2000:50). In worse scenarios men (husbands), especially in critical times, abandon families due to starvation, women endure more (Marcio & Nsemukila 2013:49). Additionally, it is a well-known fact that one of the major causes of the feminization of poverty in African society is that women in Africa are of low status due to gender inequalities perpetuated by unequal access to power and resources. Unequal access to power and resources is caused by factors such as patriarchy which has been the main obstacle to the development of women's living standards (Jacques et. al 2005:154).

In Zambia, women lack access to basic necessities due to multiple reasons. In many cases, due to social norms practiced in almost all ethnic groups in Zambia such as division of labor, it is likely that women are likely to miss a range of opportunities to enhance their livelihood. For example, in Africa due to some traditional ethos or practices, it is difficult for a woman to have access to such things as land, credit and loans, since they have to depend on men or consult their husbands to have access to such (Sweetman 2002:4).

#### **5.2.6.2 The cause of poverty in Zambia**

Poverty in Zambia has many causes and there are many factors that have perpetuated it. There is no single factor that can be pin-pointed as the overriding reason. However, the plight of poor people in Zambia is affected by interrelated factors (Chimfwembe 2013:135; Henriot 2000:48). Due to the scope of this research, only few factors that have contributed to high poverty levels in Zambia are highlighted.

#### **5.2.6.2.1 Non-translation of economic growth into poverty reduction**

According to the report of World Bank (2012b), there are two factors that have a direct relation to Zambia's poverty. The first is that the pattern of economic growth in Zambia has been highly unequal; some sectors and population have benefited more than others. The second factor is that the much talked about economic growth has not increased the income of the poor (who are in the majority) rapidly enough to lift them out of poverty. For instance, during the liberalizing of the economy in 1991, when the Zambian government adopted the Structural Adjustment Program, the government promised that the benefits of the program will trickle down to the poor. Since 1991, the country has been recording single digit inflation (6.4 percent) annually, exchange rates have been favorable, and debts were written off by the international lending institutions when the country met Highly Indebted Poor Country (HIPC) conditions which were set by the IMF and the World Bank. However, the situation has remained the same despite the country's economy growing steadily at 6.4 percent since the 1990's. Thus, one of the causes of poverty in Zambia is non-translation of improvements made in the economy with regards to poverty reduction (Marcio & Nsemukila 2013:59).

#### **5.2.6.2.2 Neglect of the agriculture sector**

Another cause of poverty in Zambia is a sector component of economic growth which has seen Zambia's economic growth concentrating much on capital investments such as infrastructural development and mining. However, in this arrangement, one sector has been ignored and to some extent mismanaged, namely agriculture. What the Zambian government has not realized is that majority of the poor people in Zambia derive their livelihood from subsistence smallholder agriculture, a sector whose growth historically has been dismal, to such an extent that the gains from this venture currently fails to translate into household income requirements (Marcio & Nsemukila 2013:59).

During the one-party state (1964-1991) of the UNIP government under the leadership of Dr. Kenneth David Kaunda, the agriculture sector was supported heavily by the government. But when the economy of Zambia was liberalized by the MMD government in 1991 onwards, the sector has been neglected in the name of "the economy being left

in private hands”. As a result, currently there are no effective extension services, there is limited access to farming inputs such as fertilizer and seeds, and access to financial lending institutions is limited due to peasant farmer’s lack of collaterals such as title deeds (Chimfwembe 2013:136). However, the government came up with the Fertilizer Input Support Programme (FISP) whereby peasant farmers are privileged to buy fertilizer at a subsidized price.

As usual, good initiatives are normally abused and used for personal aggrandizement. The Fertilizer Input Support Programme (FISP) has not yielded desired results due to political patronage. Politicians in Zambia have ended up abusing the program for personal aggrandizement. In most cases, the program has ended up using the scheme as a campaign tool, whereby they expect reciprocity from beneficiaries (peasants). For example, during the 2011 general election almost all the presidential candidates were promising would be voters that they will increase the package of the Fertilizer Input Support Programme once voted into power in order to attract people’s attention (Times of Zambia, 27<sup>th</sup> December 2014). This clearly demonstrates how politicians understand service delivery to the poor communities in Zambia. Secondly, the Fertilizer Input Support Programme is disbursed in a selective manner and in terms of favoritism as a “yard stick” used to identify beneficiaries. In this scheme each household is limited to only a 10 kg bag of maize seed, 2 top dressings x 50 kg (Urea), and 2 basal dressings (D-compound) x 50 kg bags of fertilizer. This is enough for a one hectare of land, with the expected yield of less than 100 bags of maize, valued at ZMK 75 when sold to the government (FRA) totalling ZMK 7 500, while the same quantity is sold at ZMK 50 or ZMK 45 when sold to private buyers totalling ZMK 5 000 and ZMK 4500 respectively.

Peasant maize farming in Zambia is seasonal, meaning that peasant farmers who benefit from Fertilizer Input Support Programme earn annually approximately ZMK 7 500 when they sell their produce to the Food Reserve Agency (FRA) and between ZMK 5 000 and ZMK 4 500 when they sell to private buyers. On average a peasant farmer earns approximately ZMK 5 000 to 7 500 annually from maize sales. Peasants are expected to buy a pack of inputs (subsidized by the state) as follows: a bag of 10 kg seeds at ZMK

75, 2 top dressing bags of fertilizer at ZMK 200, and 2 bags of basal dressing fertilizer at ZMK 250, totalling ZMK 975. This means that the farmer remains with approximately ZMK 4 025 to 6 525 for household use annually before the next harvest. In most cases, when maize is sold to the Food Reserve Agency, payments are delayed by 2 to 3 months, meaning that a peasant farmer's household is left with no option but to opt for "Kaloba" (loan) in order to feed the family. In Zambia, loan sharks usually charge a 50 percent interest rate per month on loans. Usually, these loans have condemned many poor people in Zambia to destitution because loan sharks usually confiscate property when a customer defaults.

According to the Jesuit Center for Theological Reflection monthly needs basket survey for February 2016, a household of five members in rural parts of Zambia needs approximately ZMK 3 700. The monthly cost includes food, personal care, clothing and recreation (JCTR 2016). Thus, due to the factors mentioned above, it is very difficult for peasant farmers in Zambia to prosper; they remain static as subsistence farmers and struggle to meet their needs (Chimfwembe 2013:136).

Furthermore, the agriculture sector growth has also been hampered by the weak market integration of poor people's activities. As a result, poor people tend to have no or little skills and education levels (World Bank 2012b). For example, the agriculture sector growth has been so robust for the past three years that the maize (corn) production of the country has recorded bumper harvests. These, and the steady national economic growth, have taken time to trickle down to sectors that generate the poor people's income. The gains in agriculture and national economic growth on average have accrued to commercial farmers, due to the benefits they enjoy from extensively subsidized farming inputs and good weather and irrigation infrastructure (World Bank 2012b).

The livestock sector has been affected greatly due to the general neglect of the agriculture sector in Zambia. In the UNIP-era the government provided preventive measures to stop the spread of livestock diseases by providing services such as dipping tanks and vaccines. These services were withdrawn when the economy of the country was

liberalized in the 1990's. The scrapping of agricultural services has affected the livestock sector greatly. It has also impacted negatively on peasant farmers who rely on oxen to cultivate their farms and manure to fertilize their lands. Many peasant farmers have been condemned to poverty as a result of reducing the hectareage of their farms. Because many of these farmers cultivate manually, this has led to chronic food insecurity at the household level (Chimfwembe 2013:136).

#### **5.2.6.2.3 Unfavourable climatic conditions**

The current rainfall pattern in Zambia has remained unstable due to climate change. Sometimes the country experiences normal rainfall while in certain cases it has been erratic. This has affected the stability of many peasant farmers who lack the adequate technology to enable them to irrigate their farms in times of drought (Namaiko 2014). This situation has resulted in most cases in crop failure and has also perpetuated poverty in Zambia. Many households, especially in rural parts of the country, face challenges in trying to mitigate this impact.

#### **5.2.6.2.4 Geographical component of economic growth**

High poverty levels in Zambia are related to the geographical component of growth. Much economic growth has taken place in urban areas, whereas the poorest people in Zambia are those who live on the periphery of the country (rural) and are barely connected to markets and the cash economy. For example, poverty in the Copper Belt and Lusaka provinces (urban provinces) is relatively low, whereas the rest of the eight provinces which are predominantly rural, poverty is approximately estimated at 80 percent. In these areas agriculture is the main economic venture (Marcio & Nsemukila 2013:59).

#### **5.2.6.2.5 Nonlabour-intense economic growth**

Poverty in Zambia is triggered by economic growth which has not been labour-intense. The unemployment rate in Zambia is relatively high. The Zambian Central Statistical Office in 2015 indicated that 13 percent of the economically active people in Zambia are unemployed. The labor force survey report indicates that the total working in Zambia is 8.12 million. From this figure only 5.8 million are in employment, 16.1 percent are



employed in the formal sector while 83.9 percent are employed in the informal sector (LFS 2014). Unemployment is higher among women (14 percent against 12 percent of men) and the youth. To make matters worse, in sectors where poor people tend to work, particularly agriculture and the informal sector, there is little activity recorded. Thus, unemployment and underemployment are some of the causes of high poverty levels among youths and women (Marcio & Nsemukila 2013:59).

#### **5.2.6.2.6 Inherited historical burden**

High poverty levels in Zambia are also caused by an inherited historical burden. The relatively new democracy has evolved much in economic and social terms since Zambia's independence in 1960's (Marcio & Nsemukila 2013:59). However, the years of exploitation cannot simply be erased with good intentions or good policies. The historical aspect needs to be taken into consideration.

Zambia was colonized by Britain, and before colonization the Northern Rhodesia territory was occupied by ethnic groups who migrated from different parts of Africa. Some migrants came from Congo (Katanga province), others came from the eastern and western parts of Africa, and some who fled from the southern parts of Africa due to tribal wars (Nayoo 2008:43). These migrants created a new community in which they co-existed prior to the colonial era. The migrants organized themselves into tribal sects with some degree of political organization. Prior to colonization, many of these communities who lived in the territory called Zambia today were self-sufficient and able to meet their needs. For many of them poverty was not an issue, and social distress was minimal because social problems were contained (Nayoo 2008:43). However, during colonialism, these communities started facing social problems which they could not contain. Colonial rule changed the atmosphere; indigenous people abandoned their way of living, livestock, and their indigenous crops. They were coerced to work for low wages in the colonial economy as the way of raising money to pay taxes and afford a newly introduced lifestyle (Simon 1985:7). Even though modernity brought spin-offs such as education and health care, these spin-offs were insignificant because colonizers had no interest in the plight of the indigenous people. They only used these people to prop up their country of origin's

economy. To date, this passed history haunts the Zambian people. In an effort to embrace modernity, the country and many of its citizens have been caught in the web of dependence syndrome (Simon 1985:7).

#### **5.2.6.2.7 Dependence syndrome**

Dependence syndrome is one of the major vices that has caused high poverty levels in Zambia. Zambia depends heavily on foreign aid to meet most of the people's needs such as building schools, provision of water and sanitation and budget support (Banda 2014:16). It is a well-known fact that dependence syndrome to a greater extent makes people relaxed in terms of hard work for meaningful development. The more someone depends on the other, the less effort they put to work and the poorer that person becomes. In as much as foreign aid is essential for alleviating the impact of poverty, it is incumbent upon the government to explore other avenues that will bring real economic growth for the benefit of the poor (Banda 2014:16).

#### **5.2.6.2.8 Emigration of highly qualified persons**

The emigration of highly qualified persons to other countries for greener pastures is another cause of high poverty levels in Zambia. Zambia has lost a lot of doctors, nurses, engineers, teachers, scientists and administrators who have opted to work in other countries due to poor conditions of service in the public service in the country (Banda 2014:16). Many qualified personnel trained, using the tax payers' money (through bursaries), have left the country to work in foreign countries. The shortage of teaching staff and health workers in schools and clinics has made it difficult for the country to make strides in the achievement of the millennium development goal on poverty reduction by 2015 (Banda 2014:16).

#### **5.2.6.2.9 Low level of literacy**

The low level of literacy in Zambia (the ability to write and read) is one of the factors that have perpetuated high poverty levels in the country. It is estimated that by 2010 94 percent of the urban population was literate, while literacy in rural areas was as low as 74 percent (R-SNDP 2014:25). However, despite Zambia making modest progress in equity

and access to education, there has been little progress in literacy levels, and as a consequence, learning outcomes remain low. The quality of services in education remains a major challenge, especially in rural areas. Comparatively, the quality of primary education being offered in Zambia is one of the worst in Southern African (R-SNDP 2014:97).

Literacy is cardinal in the fight against poverty because literacy creates confidence and innovation in a person which in the end helps one to break the shackles of poverty. The importance of education in national development cannot be over-emphasized (Ngwenya 2009).

#### **5.2.6.2.10 Lack of safety nets**

The pervasiveness of poverty in Zambia is caused by lack of safety nets to assist people who fall in low income earning brackets and those who live in abject poverty. Political decisions in this regard tend to restrict the effectiveness of social policies which are aimed at poverty alleviation (Lehning *et al.* 2006:5). For example, historically social welfare programs in Zambia have failed to yield desirable results due to patronage. One such intervention is the “social cash transfer” program which is meant for the aged (from 50 years and above). It has been selectively disbursed basing on political patronage (Miti 2008). The party in government tends to target their perceived political strongholds as a way of soliciting for votes. The party in power patronizes their electorates with these funds in exchange for votes. This state of affairs makes it difficult for the intended poor people to access help for their families (Miti 2008).

#### **5.2.6.2.11 Social and relational dynamics**

Poverty in Zambia is caused by failure to unmask the social and relational dynamics that construct the condition of poverty. For instance, in Zambia poverty is perceived to be a problem of individual poor people. Hence, poverty reduction strategies (i.e., social safety nets such as public welfare and assistance social schemes) are designed in a way that they aim at assisting an individual poor person rather than the group (Imboela 2005:443). It is important to note that individualizing poverty has its own shortcomings. It focuses

more on individuals who lose out on relations and structural dynamics of poverty and livelihood (Whitehead, 2002). Furthermore, individualizing poverty distorts the social struggles of the poor against the conditions that escalate their poverty. These struggles are social in nature; hence, they involve a collectiveness of social grouping whose livelihoods are dislocated by the powerful in society (Imboela 2005:443).

### **5.2.6.3 What is being done to alleviate poverty in Zambia?**

Poverty alleviation in Zambia has been a priority for government and non-state entities such as the church, Non-Governmental Organizations (NGO) and civil society. For instance, many of these non-state entities have set up poverty alleviation interventions in many parts of the country through the provision of education, health, agriculture and social protection facilities.

On the part of the state planning for poverty alleviation through National Development Plans (NDP) has been ongoing since 1964, even though it was abandoned in 1991 when the late President Fredrick Chiluba became Republican President. In 1991, when the government liberalized the Zambian economy from state-owned in preference for an open free market system, planning was abandoned and this brought earth-shattering changes in Zambia (FNDP 2006:i). Lack of planning made the government concentrate on short term needs which represented narrow sectional interests and this resulted in the country losing the attainment of broad-based socio-economic development (FNDP 2006:i).

In 2006, during the reign of the late President Levy Patrick Mwanawasa, there was a demand to revamp national planning. Mwanawasa argued that “even in a liberalized economy development planning was necessary for guiding priority setting and resources and allocation” (FNDP 2006:i).

In almost all National Development Plans, successive governments have identified agriculture as the engine of income expansion for the Zambian economy. The state has realized that agriculture offers the best opportunity for the improvement of poor people’s livelihood since it is the largest employer in Zambia (FNDP 2006:ii; SNDP 2014:8).

#### **5.2.6.3.1- Crop failure**

In order to address the challenges that have hampered the growth of the agriculture sector, the government has put in place intervention which will change the unbalanced agriculture policy which favors maize production at the expense of other equally important crops (R-SNDP 2014:8). Furthermore, the government has plans to decentralize extension services and introduce the latest technology in this sector in order to increase yields. The government has also introduced financial schemes for small-scale farmers particularly in rural areas (R-SNDP 2014:8).

#### **5.2.6.3.2 Improving the level of literacy**

In order to improve literacy levels in the country, the Zambian government has embarked on building schools in rural areas. The state also has introduced retention packages for civil servants who accept to work in the rural parts of the country by giving them rural hardship allowances. Additionally, the Zambian government has increased the number of teachers in both primary and secondary schools in order to reduce pupil-teacher ratios (R-SNDP 2014:102). Finally, the state has introduced compulsory early childhood learning in all government schools which previously was only a preserve of the elite who could afford such a service from privately owned schools (R-SNDP 2014:97).

#### **5.2.6.3.3 Outcome of interventions**

The interventions mentioned above have been tried in the past and little tangible results have been achieved due to weak and uncoordinated implementation. One of the weaknesses that has caused the persistence of poverty in Zambia despite many interventions being put in place is that in Zambia poverty is still primarily perceived as an economic problem despite rhetoric recognition of the multidimensional character of poverty (Imboela 2005:439). This is evident from the Poverty Strategy Papers (PRSPs) that the country has submitted to the World Bank so far.<sup>1</sup> The Zambian PRSPs and national plans are largely formulated from mainstream thinking despite the Government of the Republic of Zambia (GRZ) accepting that poverty is multidimensional. The

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<sup>1</sup> The PRSPs are documents that show the intent for the utilization of World Bank grants and loans for poverty reduction) and the national plans mentioned above.

government's conceptual and methodological framework is based on money metric measures based on poverty datum lines determined by the Central Statistics Office based on the "basket of food" for the family of six (GRZ 1998, 2006). According to Chambers (1997), "poverty must be comprehended as a product of structural process, not a single aggregated quantifiable social and economic attributes." In the Zambian government's framework the causes of poverty are mainly attributed to non-availability of production assets. It is true that poor people lack production assets and these assets are critical to the sustainability of their livelihood (Ashley 2000; Carney 1998).

However, it is important to note that a lack of assets or capital is simply a descriptive attribute which makes poverty visible. Thus, the relevant question in this regard is not about what the poor lack, but why they lack what they lack. For instance, why do poor people lack productive assets? When the question is posed in this manner, its interrogation requires methodological transcendence beyond money metric understanding of poverty (Imboela 2005:440). Consequently, framing a question in this manner challenges one to whether so much effort should be expected towards measuring poverty as opposed to investigating why a in country like Zambia with so much abundant natural resources and productive capacities 60 percent of 15 million people are poor and many children are dying every year from poverty-related causes (UNDP 2003). It is simplistic to assume that the poor people are poor because they lack assets; in the same vein it should be appreciated that poor people are poor because they are poor (Imboela 2005:440). A fruitful point of inquiry in this regard is the investigation of the structural processes. It is structural processes that make it difficult for the poor to have access to assets. It is this structural process entrenched in history, socio-cultural dynamics, social relations and gender that determines the livelihood context of the poor people. It is in the same process, therefore, where the underlying causes of the condition of poverty are embedded (Imboela 2005:440).

Poverty is a condition of powerlessness, thus, the comprehension of poverty has to be conceptualized within the dynamics of power. Structures of power define and perpetuate the condition of poverty (Bwalya 1994; Hildyad *et al.* 2001). For instance, in Zambia poor

people attribute their impoverishment to the liberalization policies that the Zambian government introduced in the 1990's. Governing elites imposed neoliberal policies that poor people think have perpetuated resource transfer to international capitalists as opposed to benefitting the country (Imboela 2005:440). Here, one can see that poverty in Zambia to some extent is fundamentally a product of the processes of power. Even at rural level in Zambia, rural elites (chiefs, village headmen, and political representatives) often maintain their status by using their contacts with governing elites who are the final lubricant in engendering rural poverty (Bwalya 1984).

#### **5.2.6.4 The impact of poverty in Zambia**

Zambians are ranked among the lowest middle-income earners, although Zambia has recently moved from the poorest countries bracket. This gesture has been necessitated by strong economic growth, prudent macroeconomic management, and market liberalization policies which have led the country to achieve an average growth of approximately 6.4 percent during the last decade (World Bank 2014). However, these stringent measures and the economic growth they have brought have not translated into a significant reduction of poverty in Zambia. According to the World Bank report (2014), social indicators for Zambia reveal that the living conditions of many Zambians have worsened. Life expectancy is now estimated at 37 years compared to 42 years at the time of independence (1964) and 54 years at the end of the 1980's. Mortality rates in Zambia are among the highest in the world. The number of orphans and street children has increased while a significant proportion of school-going ages (7-13 years) are not in school.

### **5.3 CONCLUSION**

The narration and statistics given above clearly indicates that poverty is one of the pervasive challenges faced by many Zambians today despite the country being endowed with numerous natural resources. Poverty in Zambia manifests in many different ways: low income and limited capabilities hinder the poor to meet their basic needs. As such, the poor in Zambia includes the indigent poor, those who are deprived of basic necessities, the oppressed poor who are the powerless victims of human injustice, and

the humble poor who acknowledge their helplessness and look to God to supply their needs.

Poverty alleviation in Zambia has been prioritized by both the government and non-state entities such as the church and Non-Governmental Organizations (NGO). However, the economic structure of Zambia has seen little change in spite of the state liberalizing the economy with a view that the benefits of such measures would trickle down to improve the living conditions of the citizens.

The country's economic growth has remained average despite the economy of the country growing at an impressive rate. A number of interventions have been tried but little tangible results have been achieved due to weak and uncoordinated implementation. One of the weaknesses that has caused the persistence of poverty in Zambia, despite many interventions being put in place, is that in Zambia poverty is primarily perceived as an economic problem despite rhetoric recognition of the multidimensional character of poverty. Hence, issues such power structures have been left unattended, despite them being the main causer of poverty in Zambia.



# CHAPTER 6

## Findings and recommendations

### 6.1 INTRODUCTION

This study started off with the questions how Luke 4:16-30 can be social-scientifically read in the context of the Golden Jubilee year amidst impoverished Christians in Zambia, and to what extent the social-scientific approach of the reading of this text can be developed. In Chapter 2, the history of interpretation of Luke 4:16-30 was discussed with the aim to demonstrate that scholars interpret Luke 4:16-30 in different ways. This discussion indicated that Luke 4:16-30 is interpreted through the lens of different exegetical approaches and methods. Not many scholars, however, like Esler, have interpreted the narrative from a social-scientific perspective, the approach this study has employed. Additionally, no study has been done in reading Luke 4:16-30 with a focus on the Jubilee Year amidst the poverty situation in Zambia. This is the specific focus this study has addressed.

In Chapter 3 social-scientific criticism as exegetical approach was discussed. It was *inter alia* indicated that social-scientific criticism, as a sub-discipline of the historical-critical approach to exegesis, is a helpful approach to understand the underlying socio-cultural-, political-, religious- and economic issues that are embedded in biblical texts not usually identified by readers who read ancient text only on a surface level. The Chapter also has shown that social-scientific criticism has two foci; a social-scientific investigation of the underlying social dynamic of texts, as well as the strategy (rhetoric) of texts.

In Chapter 4 it was demonstrated how social-scientific criticism helps in uncovering the dynamics of the social world behind texts, an aspect of ancient texts not normally attended to when other exegetical approaches are being used. This was done by appropriating the knowledge of social values gathered in Chapter 3 in the process of analysing Luke 4:16-30. By this analysis it was indicated that the first-century Mediterranean people were formed by the elements and values that were dominant in that society. This society was

under the rulership of the Romans. It was an agrarian society which was divided between the rich and the poor. This state of affairs was fuelled by the dominant elements such as patron-client relationships and values such as honor and shame. As such, honor and shame and patronage were the dominant elements and values which formed that society.

In the analysis of Luke 4:16-30, done through the lens of the social issues and values of the first-century Mediterranean society, it was indicated that Nazareth was Jesus' home of upbringing as a son of an artisan. Growing up in Nazareth, Jesus most probably felt the impact of the social-, cultural-, economic- and political hardships his society. This experience compelled him to stand in solidarity with the less privileged. The centre of Jesus' homily in the synagogue was patronage. The patronage Jesus claimed to initiate was different from the kind of patronage practiced in the Roman Empire. In Jesus' patronage model there was no notion of balanced or negative reciprocity, which was an integral part of the patronage that was practiced in the first-century Mediterranean society. In Luke 4:16-30 we find a brokerage kind of patronage. Jesus presents himself as a broker or mediator of God's patronage; as one who mediates the favour of God through the Spirit of God. The marginalized mentioned in Jesus' mission statement (Lk 4:18-19) were victims of balanced or negative reciprocity and the exploitation of the patronage system of their time. Due to the oppressive system of Rome, the poor, the captives, the blind and the oppressed had no capacity whatsoever to change the system. This means that peasants always looked up to somebody to move them out of their situation, which normally had an adverse effect on the order of the village. Jesus' mission statement (quoted from Isaiah), when read and interpreted in the light of the experiences of the first-century society, gives new meaning to Isaiah 61:2 and 58:6. It was concluded that the words Jesus recited in the synagogue, initially meant for Isaiah's context, were transformed to suit the circumstances which were prevalent at the time of Jesus' Galilee.

In Chapter 5 the causes and extent of poverty in Zambia were described. The aim of this illustration was to justify why liberation should be the theme of a Golden Jubilee celebration in Zambia. It was indicated that poverty is one of the pervasive challenges being faced by many Zambians today despite the country being endowed with numerous

natural resources. Poverty in Zambia manifests in many different ways. It is especially low income and limited capabilities that hinder the poor to meet their human needs. It was indicated that in Zambia the poor includes the indigent poor, those who are deprived of basic necessities, the oppressed poor who are the powerless victims of human injustice, and the humble poor who acknowledge their helplessness and look to God to supply in their needs. Poverty alleviation in Zambia has been prioritized by the government and non-state actors such as the church and Non-Governmental Organizations (NGO's). The economic structure of Zambia, however, has seen little change in spite of the state's liberalizing of the economy with a view that the benefits that will accrue from such measures will trickle down to improve the living conditions of the citizens. Unfortunately, the country's situation has remained gloomy for the poor despite the economy of the country is growing at an impressive rate. A number of interventions have been tried, but little tangible results have been achieved due to weak and uncoordinated implementation. One of the weaknesses identified, that has caused the persistence of poverty in Zambia despite many interventions being put in place, is that in Zambia poverty is primarily perceived as an economic problem despite rhetorical recognition of the multidimensional character of poverty. Hence, issues like power structures have been left unattended to, despite being the main causes of poverty in Zambia.

## **6.2 THE BENEFITS OF READING LUKE 4:16-30 FROM A SOCIAL-SCIENTIFIC PERSPECTIVE AMIDST POVERTY IN ZAMBIA**

I believe that there is a problem among Zambian Christians to get the actual meaning out of biblical texts, especially those Christians in impoverished communities – like the humble poor who do not believe in poverty as an actual entity, but instead regard poverty as a symbol of spiritual incapability which requires the intervention of God (see Figure 1). The opinion of this study is that what has caused this unfortunate situation among modern readers of the Bible is lack of appropriate methods.

In order to address this situation, there is a need to have exegetical approaches that will make it possible for biblical readers to engage biblical texts in terms of their socio-cultural settings. In this study's opinion, one such approach that guarantees a contextual reading

of the Bible is social-scientific criticism. This study has identified the social-scientific approach as most probably the best approach suiting a reading a reading of biblical texts amidst poverty in Zambia in a transformative way. The decision to work with Luke 4:16-30 was to lay bare how the social-scientific approach can be applied to a biblical text. This study argues that whenever people read biblical texts, they engage texts with their own presuppositions and perceptions - while on the other hand the Bible holds its own. It is important to note that these two different poles are separated by different social-, historical-, economic- and political spaces; that of the reader end that of the text. It is, for this reason, that when these different readers coming from different historical pattern read the same passage they will definitely arrive at different conclusions (Mouton 1995:205).

Furthermore, Mouton (1995:205) argues that when different readers of the Bible approach a given text from their own specific point of view, each of these individuals will bring with them their own questions to the text. In this study, it is argued that when reading and interpreting a biblical text in a community with a specific agenda, it is imperative that readers engage with the text from its roots. In this case, the social situation takes priority in assembling the reader's point of departure and setting questions that readers pose on the text. In this study, a social-scientific approach has been recommended as a method that can make the process of reading a text more accommodating to the context of the reader. But where does a social-scientific reading of Luke 4:16-30 leave the impoverished Christians in Zambia, and how does it advocate a way forward?

In this study, it has been established that for the 21st-century reader, to understand the context of the New Testament writings (first-century Mediterranean world writings), he/she needs to understand the social-, economic- and political elements of the society in which the text emanated from.

In view of the above, it is appreciated in this study that reading biblical texts social-scientifically enables one to see clearly that the social spheres of human life cannot be alienated. In Chapter 4, through social-scientific approach, it has been clearly demonstrated that the social sphere of the first-century Mediterranean-Palestine was at

play in Luke's narrative, even though it is not clearly mentioned therein. Furthermore, it is clearly shown in Luke 4:16-30 that Jesus' mission statement contains political connotations. In this case, one can see clearly that Jesus' ministry was both socio-politically and theologically inclined. It is for this reason that in this study it is strongly argued that Jesus' solidarity was motivated by his experiences as a son of peasant parents, and that his homily in the synagogue was motivated by patronage (see § 4.3.2).

By reading Luke 4:16-30 with social-scientific lenses, it was indicated that Jesus' image is portrayed as a liberator. Jesus' liberation agenda implicitly addressed people's social ills like structural injustices that condemn them into marginalization and vulnerability. In this regard Jessy Mugambi (2003:63-64) states that "liberation as a socio-political concept and salvation as a theological concept are two sides of the same coin, the coin of human fulfilment." Thus in Luke 4:16-30, using social-scientific lenses, salvation is seen to have taken a socio-political form; the liberation of humanity from the social-, economic-, cultural- and political aspects of life that dehumanize them. Consequently, in Luke 4:16-30 salvation is not seen in an eschatological sense. It is in the now and then.

This study has advocated for a social-scientific interpretation of Luke 4:16-30 as a tool that will inform us of the reason why liberation should be the main motif of the Golden Jubilee year in Zambia. Jesus' challenge to the *status quo* of his time points impoverished Christian communities in Zambia to the transformation of their systems that exploit and dehumanize them. The role of reading the New Testament in light of the Golden Jubilee Year in Zambia should be for transformation purposes and to "proclaim the good news that God liberates individuals, communities, and nations within the socio-political domain and that God saves within the spiritual domain" (Mugambi 2003:64).

It has been observed in this study that the social-scientific method takes seriously the experiences of characters in a text, and that people's experiences must be at the center in the reading of a text. Therefore, this study advocates that the function of social-scientific criticism as an interpretative model must direct the reader to place him/her at the center of the text. Hence, when reading the Bible amidst poverty in Zambian communities in

terms of the year of Golden Jubilee, ample time must be given to the social realities of Christians living in poverty. In this regard, this study's main concern is to aspire for the promotion of sound and transformative interpretation of scriptures. Reading text by using social-scientific criticism does just that in that it focuses on the experiences of people.

### 6.3 RECOMMENDATION

This study has indicated that that Jesus' liberation agenda implied addressing people's social ills like structural injustices that condemn them into marginalization and vulnerability. Thus, it is recommended that further research is carried with respect to Christology in the context of poverty in Zambia. This is because critical questions have risen from this study, such as those of Mugambi and Magesa:

Can the title Liberator be applied to Christ today [in Zambia]? Is it justifiable in terms of the contemporary situation [of poverty in Zambia]? In other words is Jesus seen as the 'one who makes people free'? Is he preached as such? Indeed, what is the image of Christ in [Zambia?] what images of Christ are the impoverished Zambian presented with? From the perspective of [Zambian poor people's] experiences, what is liberation as applied to the power and authority of Christ?

(Mugambi & Magesa 1990:xiv)

Additionally, in this study, it has been indicated that patronage lies at the bottom of Jesus' manifesto in Luke 4 (see § 4.4.1). The Roman type of patron-client relationship was practiced in the form of stratification. In conquered territories in which the Romans regarded their subjects as clients. Clients, in this regard, were considered inferior to the elite (patrons). This kind of arrangement was considered sacred, whereby patrons fought for honor which ensured that they monopolised political and economic opportunities (see §4.2.1). This is also typical of the Zambian situation. In Chapter 5 it was established that poverty is one of the pervasive challenges faced by many Zambians today despite the country being endowed with numerous natural resources. In this study, it was indicated that the wrong kind of patronage is part of the problem in alleviating poverty in Zambia. Poverty alleviation in Zambia has been prioritized by both the government and non-state entities. The state has come up with interventions such as the social cash transfer and FISP with a view that the benefits of such measures would trickle down to improve the

living conditions of the citizens. One of the weaknesses that have caused the persistence of poverty in Zambia, despite many interventions being put in place, is that in Zambia the fight against poverty is hindered by patronage practiced in terms of balanced reciprocity.

A fruitful point of inquiry in this regard is the investigation of how Fertilizer Input Support Programme and the social cash transfer are disbursed. It was established in this study that in most cases such interventions are used for political expediency by the party in power and its agents (political elites). It is this kind of patronage that makes it difficult for the poor to have access to resources that can improve their livelihood. Therefore, we can see that poverty in Zambia to some extent is fundamentally a product of the processes of power. Even at rural level in Zambia, rural elites (chiefs, village headmen, and political representatives) often maintain their status by using their contacts with governing elites who are the final lubricant in engendering rural poverty.

In view of the above, it is the opinion of this study that Christian communities should advocate for the kind of patronage that Jesus advocated for. Jesus' model of patronage promotes equity, whereby people are supposed to be in direct contact with one another and with God without any mediation by established brokers.

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