

**Economic justice in Luke 19:1-10: A post-apartheid
imperial critical reading with reference to the land
question in South Africa**

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i. **Declaration**

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1. I attest that, unless explicitly stated otherwise, the investigation I carried out for this dissertation is entirely distinct to myself.
2. No other university has accepted this thesis for credit toward a degree or examination.
3. The inclusion of statistics, graphs, or any other external information in this thesis is contingent upon their explicit citation as the sources of information.
4. The inclusion of external authors' written works in this dissertation is conditional upon explicit acknowledgement of their research contributions. In such instances, the source material has been rephrased while appropriately attributing the broader knowledge. When particular terms have been employed in a targeted citation, they have been duly referenced and enveloped within quotation marks.
5. With the exception of the data specified in the thesis and the section pertaining to the bibliography, this thesis does not incorporate any content, visuals, tables, or tables that have been replicated and inserted from online sources.

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ii. **Ethics Statement**

I declare that this research project obtained the requisite ethical clearance and was undertaken under the prescribed ethical standards required in terms of the University's code of ethics for doctoral research.

iii. **Dedication**

To my three children, Neo, Keneilwe, and Kgosi. May you go further and reach higher than I've been myself. The whole struggle is such that you may experience economic justice and fully live-out your God-given potential in the land of your birth. May you and your generation experience a genuinely free, democratic, equitable, and prosperous South Africa. My late mother, and brother, passed on a year into this project, the trauma of which led to delay and extension of this project. I dedicate this achievement to their memory. To my niece Thato, and nephew, Bokamoso; It is never too late to pursue your dreams. May you be inspired to achieve through this work. To my wife Mathapelo, the extended hours depriving you of quality time with me have finally paid-off. I am indebted to your love and support. May you be encouraged in pursuing your own dreams. I promise you the same love and support.

iv. **Acknowledgements**

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v. List of abbreviations

| | |
|----------------|--|
| ANC | African National Congress |
| Ann. | Tacitus, Annales |
| Ant. | Josephus, Jewish Antiquities |
| CODESA | Convention for a Democratic South Africa |
| <i>De div.</i> | <i>De Divitiis</i> |
| DRC | Dutch Reformed Church |
| EFF | Economic Freedom Fighters |
| EJ | Economic Justice |
| GEAR | Growth, Employment and Redistribution Plan |
| GR | Graeco-Roman |
| Hist. nat | Pliny the Elder, Naturalis historia |
| JW | Josephus Jewish Wars |
| Lk | Luke |
| n.d. | Not Dated |
| NP | National Party |
| Off. | Cicero, De Officiis |
| RDP | Reconstruction and Development Programme |
| SA | South Africa |
| SACP | South African Communist Party |
| SPCK | Society for Promoting Christian Knowledge |
| SSRN | Social Science Research Network |
| STATSSA | Statistics South Africa |
| TRC | Truth and Reconciliation Commission |
| VOC | Vereenigde Oostindische Compagnie |

vi. Summary

The primary thesis for this study is that the Zacchaeus micronarrative in Luke 19:1-10 epitomizes Luke's radical message for economic justice. The three tenets of the study have been sufficiently canvassed in the chapters that make this study. The first deduction is that *Luke's message on wealth and poverty is radical*. This is argued in Chapter 1 by introducing the argument, and in Chapter 2 by exploring wealth-poverty issues in Luke with a focus on the twin Lukan message of "good news to the poor" and "wealth renunciation."

The second deduction of the study, *Zacchaeus' resolve in Luke 19:1-10 is a radical response to the Lukan radical message on wealth and poverty, and has radical socio-economic implications for him personally, the Graeco-Roman world, and for those who lived in early Christian context*. It is contended for in Chapter 3 by focusing on the grammar, narrative setting, and history of interpretation of the Luke 19:1-10 micronarrative, and in Chapter 4 by focusing on the Roman Imperial economy and its power differentials.

The third and final deduction of the study, *Luke's radical message is relevant in addressing the colonial-apartheid legacy, and the post-apartheid socio-economic ills besetting the democratic South African context*. This is demonstrated in Chapter 5 by tracing the colonial, apartheid, and post-apartheid economies and highlighting their beneficiaries, and victims, and in Chapter 6 by applying Zacchaeus' resolve to the contemporary post-Apartheid South African situation as a paradigm for justice and reconciliation.

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Chapter 1

Introduction

1.1. THESIS AND SCOPE

The economic problems of post-apartheid South Africa are historical, systemic, and systematic (Motuku 2018)

The primary thesis of this study is that Zacchaeus' speech in Luke 19:1-10 is a resolve that epitomizes Luke's radical message for economic justice. This radical call by Luke contributes significantly to our prophetic understanding of economic justice in theological terms. Luke's economic message represents God's economy in contradistinction to the unjust Graeco-Roman economy. The contrast in Luke illustrates that theology can contribute to the moral vision of a just world rather than postpone justice to the "sweet by and by", "across the bridge" or worse-off, sacrifice it at the altar of personal piety.

This study is an investigation of the general Lukan economic message within the literary bounds of the text of Luke; the study moves from the general Lukan body to the particular Zacchaeus micronarrative in Luke 19:1-10. Roman imperial and socio-economic history serve as the context within which Luke was both written and read. Lastly, the study looks at the economic injustices of the colonial and apartheid eras in South Africa. The legacy of those gross economic injustices in the post-apartheid democratic South Africa will receive attention. The study will describe how Luke's radical message on wealth and poverty generally, and the Luke 19:1-10 micronarrative specifically, can assist in meting out justice for the socio-economic victims of colonial and apartheid South Africa. It will further help to bring genuine reconciliation between the former white colonizers and dispossessors and the majority black population. The study also examines the "*sins of ascendancy*" of the new post-apartheid elite rulers and the politically connected and applies the Lukan ethics to their mimicry of the misdeeds of the former colonizers.

The study deduces that:

First, *Luke's message on wealth and poverty is radical*. That is, there is sufficient material in Luke's gospel to indicate that Luke's view of wealth is suspect. Wealth has the capacity to destroy those who seek it, those who have it, and those perceived to stand in the way of accumulating it. Luke shares the widespread assumption in antiquity that the rich become so at the expense of the poor and marginalized in society (Myers 2016). As noted by Häkkinen (2016:1), the first-century world was a limited good society with an estimation that "9 out of 10 persons lived close to the subsistence level or below it", with no middle class. Unjust economic practices were therefore ungodly, inhumane, and bred generational poverty.

Second, *Zacchaeus's resolve in Luke 19:1-10 is taken as a radical response to the Lukan radical message on wealth and poverty, and has radical socio-economic implications for him personally, the Graeco-Roman world, and for those who lived in the early Christian contexts*. After meeting Jesus face to face, Zacchaeus anticipates Jesus' radical challenge and voluntarily chooses to correct his immoral ways by meting out justice for the victims of his economic fraud and exploitation. This is radical for a Graeco-Roman culture characterized by stratification, hierarchy, and imperialism. Luke thus prioritizes socio-economic justice for the poor, the marginalized and the occupied. This is radical in that Luke goes against the dominant hegemonic ethos that empowers the elite and the politically connected whilst impoverishing the rest of society. Luke amends the words of Jesus to communicate a radical message to the elite and politically-connected whose wealth and personal accumulation came at the expense of the peasant proletariat. Oakman (1991, 2008) employs innovative and interdisciplinary models fusing sociological, archaeological, and anthropological vistas to demonstrate the plight of the countryside and village peasants relative to their urban elite. He reinterprets the elite's use of money for hoarding, taxing, and foreclosing of the peasants' land. Luke's Jesus' radical message is embedded in the social, economic and cultural context of Jesus' peasant society rather the modern, religious, and idealistic interpretation of Jesus. This radical message challenges Rome's excessive taxation as well as the brutality of the Herodian-Judean political order.

Third, *Luke's radical message is relevant in addressing the colonial-apartheid legacy, and the post-apartheid socio-economic ills besetting the democratic South African context*. Luke's perspective on wealth contrasts with the practices of the Boer-Briton

socio-economic social contract solemnized in the agreement of the Act of Union of 1910. Through this, the two nations agreed to share political power, and primitively accumulate wealth whilst keeping the indigenous African majority outside mainstream economy, only disenfranchising them as trade slaves (see Mbeki 1978). It is radically different to the economic “exploitation characteristic of primitive accumulation of capital which had remained fossilised in the apartheid Boer economy” (Mbeki 1978:4). It impugns the “rapacious and predatory value-system”¹ of the new African elite rulers and the politically connected who loot, embezzle, and wastefully mismanage state resources for personal enrichment and that of their families and cronies. Luke’s message stands as a radical criticism of the colonial apartheid political economy and its attendant mimicry, characterized by the ‘*sins of incumbency*’² of the post-apartheid ruling elites and politically connected persons who seem to emulate the corrupt ways of the former colonial masters.

The study proceeds from the general Lukan message to the Zacchaeus micronarrative in Luke 19:1-10 to make the following three claims:

The first claim is that Zacchaeus as chief tax-collector represents the bourgeoisie ruling class; that is, he is a native collaborator with the Roman oppressive regime. The notion that tax collectors were examples of biblical references to economic injustice has long been documented (Horsley 2009; Capper 2004; Hoppe 2004; Weinfeld 1995; see Johnson 2013:163). MacMullen (1974:11) details the violence, physical outrage, beatings, maulings and murders, including intimidation tactics by tax-collectors while discharging their office. According to Philo of Alexandria, the Romans intentionally appointed as tax-collectors “the most ruthless of men, brimful [*sic*] of inhumanity, and put into their hands resources over-reaching” (see MacMullen 1974; Elliott 2008). Elliott (2008:93) notes that the brutality of Roman tax-collectors, and their policies of

¹Mbeki coined the phrase on the occasion of the official centennial Oliver Tambo lecture at Wits University Johannesburg in 2017. In the lecture, he argues that the traditional value system of the African National Congress (the ruling party in South Africa) based on selfless service has been replaced and repudiated by a rapacious and predatory value system which sees the ANC as a vehicle for state power and personal enrichment.

² ‘Sins of incumbency’ is a phrase coined by ANC thought leader Joel Netshitenzhe, lamenting the abandonment of the liberation values and culture and adoption of capitalistic values characterised by patronage and corruption (see Netshitenzhe 2012).

violence and oppression³ were systemic, and well known throughout the Roman Empire, a fact celebrated by those in charge.⁴ The method was to exploit the wealth of the occupied people, to the point of driving peasants to attempts of suicide. Their own “natural inhumanity” was magnified by the immunity they received from their masters (Elliott 2008:93).

The second claim is that, for Zacchaeus, being small in stature is a physiognomic criticism of his morality. Luke employs the literary technique of physiognomics where outer physical qualities are associated with inner qualities. Parsons's (2001:50-57) analysis that Luke employs “physiognomic consciousness” as a rhetorical skill helps to characterize Zacchaeus's physical description as a link between occupation and morality (see also Parsons 2006; 2007). His stature links him with his economic wrongs. Accordingly, “smallness” in physical stature means “smallness in spirit” and “small-mindedness”. Zacchaeus is a man consumed with greed, possessed by his possessions, to the total disregard of other human beings (Parsons 2006; 2007).

The third claim is that Zacchaeus, as a son of Abraham, has a share in the salvific economy of Israel. That is, despite his morally abhorrent economic practices, Zacchaeus shares the same salvific destiny with the poor Israelite peasants he is exploiting. Zacchaeus is therefore redeemable, but his redemption has costly socio-economic ramifications. Zacchaeus must make reparations by returning the stolen wealth of the poor and making total restitution of his ill-gotten wealth. This act of justice seals Zacchaeus' restored membership in the body politic that eschews him because of his ignominious profession.

Myers (2016) concludes: “In Luke’s gospel, Jesus stands with the poor because they are *dehumanized*, and challenges the rich because they are *inhumane*, hopelessly addicted to privilege and power” (emphasis in original). This is why a change in heart is *necessary*, but not *sufficient*; true conversion requires that the *structures* of economic

³ “These included mass kidnappings, public torture, and executions of family members, even holding for ransom the bodies of murdered relatives on threat of mutilating them savagely” (See Elliot 2008).

⁴ Nero is said to have told a newly appointed provincial governor (around the time Romans was written), “You know my needs. See to it no one is left with anything!” (see Elliot 2008).

apartheid must be deconstructed (*emphasis mine*). Zacchaeus has removed the first brick.

1.2. THEORY AND METHOD

The “demons” under the Zuma administration only serve to compound the issues (Motuku 2018)

This study will largely employ the imperial-critical method,⁵ which belongs to “empire studies” specifically and postcolonial studies broadly.

Carter (2015:71) notes that the imperial-critical method includes historical and literary methods but has special resonance with contemporary approaches such as postcolonial criticism.⁶ One leading biblical scholar who promulgated the post-colonial theory in the South African context is Jeremy Punt.⁷ For Punt (2003:58), postcolonial biblical criticism can best be described as a variety of hermeneutical approaches characterized by their political nature and ideological agenda, and whose textual politics ultimately concerns both a hermeneutic of suspicion and hermeneutic of retrieval or restoration.

Post-colonialism, according to Punt (2003:58), “interacts with colonial history and its aftermath(s), which concerns both a history of repression and of repudiation, but it also deals with exposé and with restoration and transformation”.

This study views the imperial-critical method as being progressive, midway between the traditional hegemonic methods of evangelical bible interpretation and the more radical methods employed by “liberal” scholarship. Imperial-critical reading seeks to bridge these two approaches by judiciously engaging the structural systems of the Graeco-Roman world whilst consistently adhering to faithful reading of the Bible. An imperial-critical reading provides the missing link in traditional hegemonic methods

⁵ Imperial-critical and anti-imperial terms are used inter-changeably in this study.

⁶ Carter (2015:71) explains that postcolonial work “focuses on the emergence, representation, and consequences of imperial power including interconnected issues of power, gender, class, race/ethnicity, and sexual orientation.... It engages biblical texts across a spectrum embracing their origin in contexts of empire through to their current reception and interpretation, often in contexts of various contemporary expressions of empire. For more on post-colonial criticism, see *inter alia* Segovia and Sugirtharajah (2009), and Sugirtharajah (2012).

⁷ For examples of Punt’s postcolonial work, see Punt (2009, 2011, 2013, 2015).

which often emphasize personal salvation and otherworldliness whilst failing to address concrete social and material conditions in this world. Accordingly, imperial-critical studies are bible-based and are consistent with hegemonic hermeneutics based on authorial intent. They supplement the lacunae in mainstream biblical interpretation by devoting attention to the Graeco-Roman background and foreground of the New Testament and the influence of Roman imperial ideology on the writings of the New Testament.

Unlike mainstream postcolonialism, the limitation of imperial-critical studies, however, is often the lack of application of criticism of ancient imperial powers to modern day empires. The reason is that most imperial-critical studies are done by Westerners who are themselves beneficiaries of these modern-day self-appointed neo-colonial and imperial powers. This has led postcolonial scholars to employ a hermeneutic of suspicion against empire studies, reducing it to a variation if not a watered-down version of post-colonialism (Sugirtharajah 2006:133; 2012:80-81; Boer 2009:119).

Despite the above criticism, this study views imperial-critical studies as offering a progressive balance between the opposite extremes of post-colonialism scholarship and the apolitical traditional hegemonic scholarship. It assumes both a “faithful” reading of the Bible whilst engaging with its subject-matter “critically”. The radical message of Luke is therefore not watered-down by the history of the bible’s use in the colonial-apartheid project.⁸

De Jongh⁹ (2000), has argued for a responsible exegetical process that takes into consideration God, the faith community, the world, and the historical tradition of the

⁸ Reference here is made to the theological justification of apartheid by Reformed theologians (see Manavhela 2012; Volsoo 2015).

⁹ De Jongh (2000) suggests that biblical interpreters have responsibility at four levels in the exegetical process, that is: 1) responsibility to the God of Scripture (defined as the ‘responsibility which acknowledges that the Christian Bible is a product of divine revelation, and that the God of that revelation is intimately involved in the practical exegetical task’; 2) responsibility to the community (defined as the ‘responsibility which recognizes the community or communities of faith as forming a vital practical context for the exegetical task and the conclusion of that task’; 3) responsibility to the world at large (defined as the ‘responsibility in response to which the exegete undertakes to consider the challenges presented to the biblical text and to the exegete by those contexts and persons who would be regarded as either on the fringe of the community of faith or outside the community’; and 4) responsibility to the historical and universal church (defined as the ‘responsibility by which the exegete recognizes their context as being part of the older history of the church and the greater setting of the universal church’).

church. The imperial-critical method recognizes this responsibility and employs the traditional historical-critical approach to exegesis in critical reading and engagement with the Bible.

To investigate the first claim, that is, *the radicality of Luke's message on wealth and poverty*, the study assumes a formal approach for critical analysis of the literary text of Luke. Through formalism, the study concentrates on the text by focusing on style, structure, tone, and imagery to analyse how Luke crafts the elements of his gospel to communicate a radical message on wealth and poverty. As such, Luke's biography and the history of the development of his gospel are secondary to this study. The study is concerned with the text of Luke as we have it today.

The second claim is that *Zacchaeus's resolve in Luke 19:1-10 is a radical response to the Lukan radical message on wealth and poverty, with radical socio-economic implications for him personally, the Graeco-Roman world, and the early Christian contexts*. Consequently, the imperial-critical method will be used to exegete the Zacchaeus micronarrative in Luke 19:1-10. Historical-criticism will be employed to analyse the cultural make up, ideas and values of the first-century Graeco-Roman world as both the contextual background and foreground of the Gospel.

In this regard, Fiensy (1991) has offered a useful monograph reconstructing the social history of the peasantry in Palestine and their socio-economic state against their powerful urban elite. Relevant to this study are the lucrative plantations and estates in the Jericho region. These became a source for peasantry revolution, and its change of hands from the Ptolemaic to the Graeco-Roman period depending on the conquering regime of the time. Fiensy makes a significant observation of Jubilee theology with its egalitarian overtones, against the prevailing cultural norms of the conquering empires and how they impacted the socio-economic livelihood of the conquered peasants in Palestine. Land occupies the centre stage throughout this historical period.

Carter (2006) has offered a brief, yet complete, historical picture of the Roman Empire in the New Testament writings. This historical reconstruction highlights social stratification, hierarchy, inequality, military coercion, economic exploitation, theological propaganda, and political domination as the prevailing ethos of the Roman imperial culture (Carter 2006, see also Diehl 2011).

King (2019) argues that there was a cultural bias towards wealth gained through land ownership, and special honours were attached to producing wealth, given the agrarian nature of the Roman economy. Carter (2006:3-4) argues that the land remained the elite's source of wealth and power, and heavy taxes and rents were imposed on the peasant majority. Carter (2006) goes further to suggest that the aristocracy, comprising only 3 percent of the population, enjoyed close to 65 percent of the land and its yield as a valuable commodity. Ordinary people were maintained the opulent lifestyle of the elite through taxes and rents paid in goods and heavy taxation estimated to be between 20 to 40 percent of the catch, crop, or herd (Carter 2006). To not pay taxes was regarded as rebellion against Rome and invited the inevitable and ruthless might of the Roman military.

Boer and Pettersen (2017) has helped to identify three institutional forms of the Roman imperial economy relevant to this study (i.e., city-country relations, land tenure, and slavery). These key Roman economic building blocks correspond to the three regimes coalescing at different facets of the imperial domination namely the colonial regime, the land regime, and the slave regime. Together, these institutional reforms and regimes formed the backdrop of the multi-layered economy of the Roman imperial world. To these, Boer and Pettersen (2017) adds the fourth peasant institutional reform, namely subsistence-survival production as a form of protest.

Accordingly, economic exploitation was maintained primarily through the land regime characterized by land tenure, and the slave regime characterized by the ownership of other persons served to supply armies of slaves and bonded workers to supply unfree cheap labour (King, 2019). Land ownership and never-ending debt¹⁰ served to bind the peasant workers to their elite masters. King (2019:215) suggests that the ratio between one elite maintenance and peasantry worker was 1 to 10.

This study employed historical-critical tools to analyse how Luke reworked Jesus' words to contrast the illustrated hegemonic Roman political economy with God's economy. As King (2019) argues, Luke has a theological construction of economy, with

¹⁰ For a more detailed analysis of the role of debt, see Boer and Petterson (2017:98-100).

an “imaginative construal of economies: Roman economy and God’s economy”. This theological construction and imagination are universalised to make a distinction between the Graeco-Roman economy and God’s economy.

1.3. CONTEXT OF THE STUDY: LUKE 19:1-10

The political transition of 1994, whilst offering political freedom, did not address the economic injustices of the past (Motuku 2018)

The context of the story of Zacchaeus is the final stage of Luke’s travel narrative (Luke 9:51-19: 27). The micronarrative is viewed as a summary of Jesus’ ministry, that of seeking and saving the lost, before going to Jerusalem (see Pilgrim 1981). According to Méndez-Moratalla (2001:120), “Zacchaeus, a chief toll collector, is the final example of repentance in the travel narrative (19: 1-10)”. Themes such as Christian discipleship consumption and wealth and attitude towards possession have been characteristic in the analysis of the micronarrative (Pilgrim 1981; Metzger 2007; Méndez-Moratalla, 2001)

The literary form of Luke 19:1-10 is also the subject of much debate and speculation. Bultmann (1963:55-57) categorizes the text as a biographical apophthegm representing both an ideal and metaphorical situation, while Dibelius (1970:50-51) further sees Luke 19: 1-10 as a personal legend, albeit with a historical core (see also Marshall 1978:695). White (1979:21) questions the approach to Luke 19:1-10 as a salvation story since he finds in his analysis of the text that none of the elements required to be identified as a salvation story are present. This suggests that the text should rather be understood as a vindication of Zacchaeus. Tannehill (1981:1-13, 113) has argued for a pronouncement story, particularly of the quest type, for a proper reading of Luke 19:1-10 (see also Fitzmyer 1985:1219).

Two major theories of interpretation exist in the historical interpretation of Luke 19:1-10 micronarrative, namely vindication theory and resolve theory. The vindication theory interprets *δίδωμι* and *ἀποδίδωμι* as “customary presents” implying that the words of Zacchaeus in the story signify customary behaviour in the practice of his Jewish faith as a “son of Abraham”. The resolve theory is diametrically opposed to the vindication theory in that it views *δίδωμι* and *ἀποδίδωμι* as “futuristic presents”, meaning that the

words of Zacchaeus in the story signify a change of attitude with attendant change of behaviour going forward.

Luke 19:1-10 is paradigmatic of many interpretations on issues of wealth and poverty in Luke. For instance, there is the juxtaposition with the story of the rich young ruler in the Luke 18:18-30 micronarrative. The dominant view in the analysis of the Luke 19:1-10 micronarrative is that Zacchaeus is a model of the right use of possessions by Jesus followers. Almost always Zacchaeus' attitude to wealth is compared to that of the rich young ruler who not only possessed wealth but has allowed wealth to equally possess him. Jesus' command to the rich young ruler is always contrasted with his seeming approval of Zacchaeus' divestiture of half his wealth. Jesus is often accused of dealing differently with Zacchaeus as compared to the rich young ruler.

According to Phillips (2001), the greatest meaningful difference between the two stories is the demands that Jesus places on each of the protagonists. Phillips views Jesus as having changed the initial demand for renunciation in favour of voluntary almsgiving. Pilgrim (1981) however views Zacchaeus as a model for the right use of possessions and discipleship. Pilgrim fails to see Zacchaeus as a repentant fraudster who, in line with Luke's radical message, must demonstrate conversion by meting out justice to the victims of his fraudulent ways. Rather than being a model for the right use of possessions, Zacchaeus's story is that of restitutive justice rather than radical sharing of the rich. It is a radical call for discipleship rather than the glorification of almsgiving.

For Seccombe (1982), the difference between the two stories is the attitude of the main actors, and Jesus deals differently with each according to their attitudinal responses to their wealth and possessions. Jesus does not require complete renunciation from Zacchaeus but praises the voluntary dispossession of half of his wealth (Phillips 2007). According to Seccombe, no demand is made by Jesus for Zacchaeus to renounce his wealth, instead, Zacchaeus volunteers to give half his possessions to the poor and to make fourfold restitution. Renunciation of wealth is therefore not demanded by Luke as Zacchaeus remains materially in a situation comparable to where he began.

Kim (1998) concludes that, since Zacchaeus voluntarily initiates an act of almsgiving, no amount or percentage is forced or required in a legalistic way, instead Zacchaeus decides to give half his assets to the poor. Kim reduces Zacchaeus' radical divestiture to limitless generosity exhibited in almsgiving. As noted by Danker (1998), Kim's argument is riddled with "questionable interpretations and dubious subordinate conclusions" for a subject already "smothered under contentious exegetical debris". Hays (2010), whilst agreeing that Zacchaeus' act is one of renunciation, nonetheless reduces his act to that of a local disciple who is not required to give all his wealth. Hays believes that only those called to be itinerant disciples like the rich young ruler are required to give all their wealth. Ringe (1995) nevertheless sees Zacchaeus' act of divestiture as extraordinary, despite the disparity in the demands required of the rich young ruler. Schottroff and Stegemann (1986) point out however that giving away half of your possessions is too radical an act that cannot be simply or adequately explained or contained with the simple name of almsgiving. Tannehill (1996:277) rightly argues that Zacchaeus' act exemplifies two requirements: care for the poor and fourfold compensation for the victims of his fraudulent ways (see also Wright 2004:277).

King (2019:120) also notes that voluntary dispossession in Luke is always about caring for the poor and not simply about the dangers of wealth. Metzger (2007:217) points out that the word order of *τοῖς πτωχοῖς δίδωμι* in Zacchaeus' proclamation in Luke 19:8 places particular stress on the poor. It emphasizes that Zacchaeus' giving is first about caring for the poor and is about redistributing wealth in a fairer way, to fulfil Jesus' mission of economic justice. As King (2019:120) notes, renunciation of wealth and care for the poor are and inextricably intertwined. Through this act of radical divestiture therefore, Zacchaeus frees himself from the blight of primitive accumulation through oppression, domination, and fraud characteristic of the Roman culture of imperial economic exploitation. As noted by Crowder (2007:179), Zacchaeus' "desire to pay the poor shows his willingness to cleanse himself of any Roman monetary 'dirt'".

Perhaps the most cogent analysis of Luke 19:1-10 comes from an early fifth-century (408-414 CE) Pelagian treatise by Dio Chrysostom called *Wealth or De Divitiis (Or. 79)* which aptly sums Zacchaeus encounter with Jesus as follows:

Having welcomed the Lord not only into his house but also into his faithful heart, he said of his own accord and without prompting or teaching of any kind: Behold

I give half of my goods to the poor, and if I have defrauded anyone of anything, I restore it fourfold [Luke 19:8]. By this we understand that, after reasoning with himself, he laid out half of his wealth in compensation for fraud and distributed the remaining half to the poor, so that he might share in that state of blessedness which was promised to paupers in return for their sufferings (Dio Chrysostom, *Divit.* 11.7; see King 2019:198-210).

King (2019:204) points out that Zacchaeus cannot be paraded as an ideal model of faithful discipleship by the rich without renunciation of possessions to the point of virtually giving up of all that he had. Sick (2016:231) notes that his “status results not from his own accomplishments or character but is granted to him by the elites who are collaborating with or are part of the Roman Empire”.

Also employing a linguistic analysis, this study will demonstrate that the words of Zacchaeus in Luke 19:1-10 are a response to Luke’s radical economic message focused on justice for the poor and marginalized. It is the story of divine justice as a judgement on systems of economic disparity (Myer 2016).

1.4. ELEMENTS OF IMPERIAL-CRITICAL EXEGETICAL METHOD IN LUKE 19:1-10

As demonstrated, economic policies designed to address these historical inequalities have not yielded the designed results (Motuku 2018)

1.4.1. Economic oppression

Taxation was a political and economic structure that strategically advantaged the elite, and the imperial presence of Rome in Jericho was exemplified by tax-collectors such as Zacchaeus, being chief of them. This speaks of colonial occupation. Perdue (2005:282) notes that profit is always the driving force and goal of imperialism, always resulting in the financial slavery of natives and the exploitation of their natural resources. The flourishing local economy of Jericho based on its natural resources is well-recorded. Jericho was a strategic centre for trade, and a port of entry for all traffic crossing the Jordan from the east (the river ford five miles east was one of only three points between the Sea of Galilee and the Dead Sea at which the river could be crossed).

1.4.2. Military oppression

Narratively speaking, Luke seems to selectively place Zacchaeus's story as the last encounter in the travel account to further his goal of reversing the socio-economic and political oppression of Rome (see the song of Mary in Luke 1:46-55). Whereas Jericho was the first colonial city to be conquered by Israel (Joshua), in this micronarrative it is the seat of the culmination of the liberating mission of Jesus, "to seek and save the lost" (Luke 19:10). That Jericho was a significant city during the Jewish revolt and Rome's military clampdown of the rebellion and the subsequent detachment of the XI legion is a recorded fact of history (Fiensy 1991). The micronarrative is sandwiched between the sub-plot of the final movement towards Jerusalem in (Luke 18:31-34) for the last confrontation with the powers, and the dark parable of the Minas. It thus signifies the fate of those who reject the possessive mammon system (Luke 19:12-27).

This narrative section has sufficient material to suggest that the local and imperial authorities killed Jesus on the basis of their perceived subversive economic and political character of his ministry. This is further exemplified by Jesus' final push to Jerusalem in the symbolic "march" through the city gates (Luke 19:28-40), Jesus' lament over Jerusalem's fate (Luke 19:41-44), and Jesus' "exorcism" of the temple of "robbers" (Luke 19:45-4),

Thus, Perdue (2005) defines imperialism (the oppression of an indigenous population by a colonizing external power) as military and/or economic control.

1.4.3. Language

Repression of native language is one of the leading imperial weapons. The crowd's voice is reduced to grumbling, denoting their inability to speak for themselves. Russell (1985:582-602) explains that being able to speak and have access to the language of power and authority is a tool of control akin to military force. According to Said (1993:166), imperialism is also a state of mind that imposes on the colonized subject a way of thinking that is foreign and unnatural. This way of thinking often permeates and persists in all strata of society long after the physical imperial domination is gone. As Steve Biko (1976) retorted, often "the most potent weapon of the oppressor is the mind of the oppressed". Thus, Arnold and McConnell (2015) view language as the greatest tool of colonization, violating native language and people's voices.

A decolonial reading of Luke 19:1-10 is therefore necessary to dismantle the imprint of imperialism in the culture and spirit of former colonies once physical imperial domination is overcome.

1.4.4. Dehumanization

In the first narrative encounter in Jericho, Jesus is met with destitution through a blind beggar who is a social outcast (Luke 18:35-19:2). The marginality of the blind man is signified by the lack of mention of his name. In this micronarrative, the second account in Jericho, Jesus is now met with affluence in the person of Zacchaeus. This juxtaposition by Luke signifies the opposite extreme economic realities in Jericho and taxation as the defining factor in understanding their relationship. Whereas the blind man is blinded physically to see Jesus, Zacchaeus seems to be blinded morally to seeing Jesus by his economically fraudulent ways.

Patterson (1982:38) describes dehumanization as “social death,” which begins with desocialization – the more one is alienated from other humans, the easier it is to convince a person of his or her “non-being.” According to Oliver (2004), colonial authority lies in the imposition of colonial values whilst denying the colonized internal life, mind, or soul. In the same way that Jesus stopped to listen to the marginalized beggar (Luke 18:40); Zacchaeus stood (Luke 19:8) to listen to the murmuring and grumbling of the poor and marginalized. Zacchaeus goes beyond mere restitution and redistribution of wealth to the crowd; he restores their identity as human beings. Both the destitute blind beggar and Zacchaeus receive sight, and the gulf between them is bridged through economic reparation and redistribution. This is in contradistinction to the gulf between the rich man and wretched Lazarus who enjoys comfort in the bosom of symbolic Abraham (Luke 16). The rich man failed to use his wealth to narrow this gulf, thus cutting himself out eternally from the salvific destiny of the sons and daughters of Abraham.

1.4.5. Native collaborators

Zacchaeus is a native collaborator in the oppression and exploitation of his countrymen and the pillaging of their natural resources. Myers (2016) reports that tax-collectors positioned themselves as agents of Rome in the exploitation of their own people, and, as such, they were “socially rejected, religiously excommunicated and viewed as

political traitors”. Zacchaeus as *chief* tax collector would have been the *most* rapacious and thus the *most* despised.

1.4.6. Salvation

Salvation here is two-pronged. It is good news not only to the poor and marginalized crowd; it is also good to those who are controlled by their possessions and wealth like Zacchaeus. Nevertheless, freedom is possible from the perils and dangers of riches and possessions.

Salvation starts by Zacchaeus coming down from the sycamore tree¹¹. He entertains Jesus together with his poor entourage, stops to listen to the crowd’s murmuring and grumbling. Finally, he divests half of his wealth and makes fourfold restitution of economic fraud towards his fellow countrymen. Divine justice therefore demands reparation as a fruit of repentance and a change of heart and attitude towards wealth.

Perhaps the phrase “son of Abraham” echoes Jesus’ statement after healing a bent-over woman in the presence of the murmuring pharisees and teachers of the law, justifying her rightful claim to healing as a “daughter of Abraham” (Luke 13:16). Here an economically bent-over crowd is healed, and Zacchaeus, a morally bent-over chief tax-collector is also healed amidst a murmuring and grumbling crowd.

1.5. SIGNIFICANCE AND CONTRIBUTION

The writer’s view is that “white South Africa” needs a “Zacchaeus moment” where they will appreciate the unjust racially skewed economic imbalances of the past that benefitted them, and voluntarily offer to share the economic wealth of the country (Motuku 2018)

The study views Zacchaeus's words in Luke's 19:1-10 as the epitome of the radical response needed to Luke’s radical economic message. This radical response includes repentance from fraudulent economic ways and restitution for the victims of economic fraud. Zacchaeus words *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 are interpreted as “future presents” signifying a resolve marked by a commitment to a changed behaviour going

¹¹ This seems to “fulfil” Mary’s revolutionary Magnificat, which at the outset of Luke’s story (1:52) sang about divine justice bringing *down* the powerful and lifting *up* the lowly (which Jesus has just done with the beggar in 18:42). Earlier in the story, when teaching about predatory sin and redemptive forgiveness, Jesus says: “If you had faith the size of a mustard seed, you could say to this mulberry tree (*sukaminō*), ‘Be uprooted and planted in the sea,’ and it would obey you” (17:6). Here someone high up *in that very tree* is “uprooted,” and transplanted in Jesus’ new order (Myers, 2016).

forward. This interpretation identifies with what interpreters have called a resolve theory.¹² The resolve theory is ultimately a conversion theory which sees Zacchaeus as a repentant fraudster who at the point of conversion commits to making restitution out of his ill-gotten wealth to effect justice for and reconciliation with his victims.

Boesak (2008:641) also sees Zacchaeus as exemplifying “radical consequences of genuine reconciliation: transformation, restoration, justice”. This is significant, since many previous studies of Luke’s wealth-poverty ethics have either seen Zacchaeus as a model for the right use of possessions and discipleship Pilgrim (1981), an example of charity-ethics Seccombe (1982), or limitless generosity exhibited in almsgiving (Kim 1998).

These studies ultimately gravitate to what the interpreters have called the vindication theory.¹³ Proponents of the vindication theory interpret the words δίδωμι and ἀποδίδωμι in Luke 19:8 as customary presents which would imply a common practice of divesting half his wealth to the poor. The vindication theory is ultimately a “defence theory” which sees Zacchaeus words as a defence against an unwarranted attack by Jesus’ audience.

¹² Hamm (1998) believes the words δίδωμι and ἀποδίδωμι of Zacchaeus in Luke 19:8 is a resolve thus rendering them as ‘futuristic present(s)’. He argues that “giving half of your possession” can only be a quantitative possibility and never a customary behavior. According to Hamm (1988:434), “the most natural understanding of ἀποδίδωμι would take the statement as a resolve to fraud committed in the past”. Drawing on the centuries old patristic tradition, Hamm (1988:431) argues that “the traditional interpretation, from the patristic era down through most modern commentators, has understood Luke 19:8 as the vivid expression of a convert’s resolve, something that might best be captured in the contemporary colloquial English in this way: “Look, Lord, I’m giving half my goods and if I have defrauded any one of anything, I’m restoring it fourfold”.

¹³ Fitzmyer (1985:1225) is representative of this view and argues that “there is no need to understand δίδωμι as a futurist present, since grammatically it is the same as the Pharisee’s present-tense description customary behavior”. He regards Luke 19:1-10 as a pronouncement story. Fitzmyer’s argument is regarded as “the most cogent to date for reading Luke 19:8 as defense rather than resolve” (Hamm 1988:433). Other proponents includes Mitchell (1990 who) who sees δίδωμι and ἀποδίδωμι in Luke 19:8 as “customary presents which serve as defense of Zacchaeus before a condemning crowd”, Richardson (n.d. 5-6) who agrees with both Fitzmyer and Mitchell and argues that Zacchaeus’ speech can be interpreted either as “Look, Lord, I’m giving half my goods to the poor and if I have defrauded any one of anything, I’m restoring it fourfold,”(quoting Hamm 1988:431-432) or as “My customary practice is to give half of what I have to the poor, etc.” (citing Green 1997: 671-672).

Grammatically, the use of the present active indicative tenses of the Greek verb allows for both an iterative¹⁴ and future¹⁵ translation (see Méndez-Moratalla 2001:260). The point, however, is not how the verbs are translated but how they are understood in each context (see Hamm 1988:431). Employing this grammatical contextual imperative rule, Méndez-Moratalla (2001:260) argues that the “established context of the story requires a future present as the best reading of Zacchaeus’ intentions; a present resolution showing his repentance and inclusion in the Kingdom of God”.

Consistent with Méndez-Moratalla (2001), this study suggests that the Lukan corpus,¹⁶ grammatical analysis, and intra-inter contexts supports the interpretation of διδωμι and ἀποδίδωμι in Luke 19:8 as future presents signifying a resolve marked by a change of attitude and behaviour going forward.

It is significant that all “three tax collector accounts [in Luke] focus on a lost sinner” (Seo 2015:90). Luke is consistent in using the table fellowship narratives to further his conversion motif. Acknowledging Jesus as Lord (Luke 19:8) therefore, Zacchaeus seeks to make things right by rectifying the economic wrongs he had done, that is, wealth accumulated through extortion (Seo 2015). Luke makes direct mention that Zacchaeus was rich (Lk 19:2). That is, his economic status is because of his occupation as “chief tax collector”. This special Lukan reference of Zacchaeus as rich implies that he is a beneficiary of the economic exploitation of the poor. According to Corbin-Reuschling (2009:72), the chief tax collectors had more power and wealth than other ordinary tax collectors. In his capacity as chief tax collector, Zacchaeus “had the opportunity for personal gain” (Harrison, 2005). As a high-ranking tax official, Zacchaeus thus had an advantage over low-ranking tax collectors within the broader hierarchical society of the Roman system. His position gave him proximity to economic resources within the broader Roman patronage system (see Seo 2015).

¹⁴ Iterative verbs describe an event that happens repeatedly. Zahn (1913:622) makes a valid claim when he observes that “Zacchaeus could give half of his goods only twice, and then he could surely no longer qualify as rich”. Zahn is right to rebut that giving half-possessions as a customary behavior though quantitatively possible, seem less probable and unsustainable.

¹⁵ Future present describes future event, though it typically adds the connotations of immediacy and certainty. Moratalla (2001:260) subsequently translates Luke 19:8 as “Look, half of my possessions Lord, I will give to the poor; and if I have defrauded anyone of anything, I will pay back four times as much”.

¹⁶ Δίδωμι also appears in Luke 4:6 where Satan promise to give all the kingdoms of the world to Jesus or anyone who bows to him, and in Acts 3:6, where Peter heals the man at the ‘gate called beautiful’. To interpret these two other contexts as iterative denoting repeated events would be untenable.

1.5.1. Practical significance

Without this equal distribution of wealth in South Africa, racial tensions will be inevitable as the signs are already evident (Motuku 2018)

The practical significance of this study is its application to the economic justice and reconciliation project of the post-apartheid democratic South Africa. The history of South Africa, like most former settler colonies, is characterized by the “occupation of a territory and the alienation of the indigenous people from this occupied territory” (Delport & Lephakga 2016).

The CODESA negotiators adopted a gradual rather than a radical socio-economic transformation. The liberation movement suspended such a radical programme in favour of political transition leading into state power. The National Party however safeguarded white privileges, private property rights, and the wider communal interests of white people generally and the Afrikaner community in particular (See Southall, quoted in Adam & Moodley 1993).

As noted by Setzefel (1994:458), “[f]undamental questions of social justice and political power were left unresolved to permit democratic progress”. Thus, “the elections were interesting as much for what they did not settle as what they did”.

The above negotiated settlement has been lamented by many social commentators as one of the fundamental flaws in the birth of the post-apartheid democratic South Africa. Lephakga (2015:8) argues that “the ANC was outsmarted during the negotiations in that, at the formal negotiations, the ANC won political power whilst the NP/corporate sector in South Africa won economic power”. Some¹⁷ in the liberation movement itself felt that the negotiators over-negotiated in the quest for political transition and state power to the point of “selling out” on the aspirations of the black majority. Therborn (2019:34) blames this chosen gradualism path for the persistent socio-economic inequalities that These can be traced back to the “never directly tackled legacy of

¹⁷ I refer here to Winnie Mandela the late liberation stalwart and wife of Nelson Mandela (The first democratic President of South Africa revered as the ‘Father’ of South Africa’s democracy) and Chris Hani (The popular leader of the South African Communist Party and the ANC who became a political martyr in 1993). The Economic Freedom Fighters, a splinter party from the ANC also maintains this view often referring to Mandela as a ‘sell-out’.

settler colonialism” despite the “extremely skilfully negotiated and managed exit from apartheid” and “the very substantial government efforts at social policy redistribution”. Therborn (2019:39) concludes that the political, economic, personal, and psychological roots of apartheid inequality were not tackled.

The result is what Zizzamia *et al.* (2019) indicate that the composition of the various strata of society shows a stubborn trend of over-representation of African people (over 90%) among the chronically poor. Zizzamia *et al.* (2019) further assert that the elite, in the highest income category, are “more homogenously white”, although the African proportion of this category grew from 14% in 2008 to 22% in 2017.

Statistics South Africa, commenting on inequality trends, notes that “aggregate inequality remains resiliently high” in South Africa (StatsSA 2019). The majority of black South Africans remain in the bottom rung of society in all key socio-economic indicators like economic inequality, asset and wealth inequality, labour market inequality, inequality in the social domain, and social mobility.

The High-Level Panel report (2017) noted that “the legacy of spatial inequality appears intractable” in post-apartheid South Africa, and that “the ills of the past are being reproduced in post-apartheid society despite extensive legislative reform”. Furthermore, “the observed changes have not dented the deep inequities in the quality of services received in many instances, nor have they made fundamental shifts in outcome” (see Motlanthe 2017). This is the current situation despite the priority of poverty and land redistribution by both the Reconstruction and Development Plan (RDP)¹⁸ and the National Development Plan (NDP 2012:24; see RDP 1994:7)¹⁹. The two-pronged approach to inequality, that is, the “categorical representation of black people in the apartheid inherited structures” and “redistributive compensation for structural inequality” has not dented the structural socio-economic legacy of apartheid.

¹⁸ The Reconstruction and Development Programme (RDP) is a South African socio-economic policy framework implemented by the African National Congress (ANC) government of Nelson Mandela in 1994 after months of discussions, consultations and negotiations between the ANC, its Alliance partners the Congress of South African Trade Unions and the South African Communist Party, and “mass organisations in the wider civil society”.

¹⁹ The National Development Plan (NDP) is a long-term South African development plan, adopted by the National Planning Commission in collaboration and consultation with South Africans from all walks of life.

This is because the twin pillars of the apartheid state, namely “colonial economic structures” and its “dichotomised spatial structures” were left intact at CODESA.

The notion of two economies (third and first world economies, as noted by Koma (2013:154) and two nations still persists (Mbeki 1998).²⁰ The first is: “one white, relatively prosperous, regardless of gender or geographic dispersal with access to a developed economic, physical, educational, communication and other infrastructure”. The second is “one black and poor, with the worst affected being women in the rural areas, the black rural population in general and the disabled living under conditions of a grossly underdeveloped economic, physical, educational, communication and other infrastructure”. This has led Achille Mbembe (2008) to dismiss the notion of a decolonized, post-apartheid South Africa.

Saul (2012a) believes that South Africa is not really liberated for as long as inequality persists. Structural inequality manifests in land ownership and land rights (Kepe & Hall 2018). Recently, President Ramaphosa described the land issue as a burden of history, an “original sin” that the present generation must resolve (Merten 2018:3).

Restrictive laws were promulgated by the Apartheid government to regulate land ownership and to control the influx of black workers to cities. This resulted in the development of a “highly dualistic and racially segregated” land structure. This contained a commercial and technologically advanced white farming sector on the one hand, and an underdeveloped black peasant sector on the other (Cousins & Scoones 2010). These pieces of legislation²¹ were designed for unequal distribution of land, to ensure that white people own most of the productive agricultural land. Black people were arbitrarily deprived of land, property and livelihoods, and relocated against their will to overcrowded, unproductive and undeveloped native reserves and homelands

²⁰ Mbeki (2004: 29) contends that the first economy is modern, produces the bulk of the country’s wealth and is integrated within the global economy. The second economy (also known as the marginalized economy), is characterized by under-development, and contributes little to the Gross Domestic Product (GDP). It contains a big percentage of our population, incorporates the poorest of our rural and urban population, is structurally disconnected from both the first and global economy, and is incapable of self-generated growth and development. According to this view, the second economy is adversative to the first (Bojabotseha 2011:2).

²¹ In this regard the *1911 Job Reservation Act* (popularly known as the Color Bar Act), *the 1913 Land Act* and the *1950 Group Areas Act* become the critical backdrop in understanding spatial, racial and gender distribution of poverty, inequality, and unemployment.

(see Van der Elst 2017). Landlessness in post-colonial South Africa manifests around townships and cities (Ramantswana 2017).

Kepe & Hall (2018:4) argues that land has always been a central feature of both colonialism and decolonization. White interests in agriculture and mineral-extracting economies propelled racial segregation and skewed land patterns in colonial apartheid South Africa (see Horwitz 1967; Kenney 1996:10; Lowenberg 2014:4). Atuahene (2007) argues that colonial and apartheid land dispossessions (dignity taking) resulted in dehumanisation of people as well as the deprivation of their dignity. Land redistribution is about restorative justice and reparations (dignity restoration) to “make whole” those who had suffered from the theft of their land (Atuahene 2007).

The land reform project in South Africa was aimed at redressing the injustices of the colonial and apartheid past, providing access to land for residential and agricultural purposes to improve the livelihood of the majority black poor (Department of Land Affairs 1997; Cliffe 2000; Jacobs, Lahiff & Hall 2003). Nevertheless, the pace of land reform and redistribution has been unacceptable. This is due to constricted and old-fashioned “modernist” (and often implicitly colonial) orthodoxies still current in South Africa or “lack of political will, inadequate budgeting, poor implementation and dysfunctional structures” (Cliffe 2000:273, also in Choruma 2017:33; Motlanthe 2017:215, 233). All redistribution targets in the land reform programme have so far been reviewed.²² There is consensus that land reform has not been meeting the objectives and targets set out and that the pace of land reform is very slow, despite picking up since 1999 (Jacobs 2003; Ntsebeza & Hall 2007; Lahiff 2007).

Little progress has been made to address the historical injustices of land dispossession and to enforce the constitutional ideals of land restitution and redistribution. This has led to the debate and publishing of the draft expropriation bill by parliament of South

²² The targeted 30% redistribution of commercial agricultural land to 600 000 small-holding farmers since 1994 has been reviewed twice from the 5 years target in 1999 to 15 years in 2015. Only 1% of land had been redistributed by 1999. As a result of the slow pace of land reform and the failure of land reform programmes, this target was again shifted to 2025, but the focus this time was on increased production and sustainability than on obtaining a set target (Nkwinti 2013).

Africa to make way for expropriation of land.²³ The work of the TRC²⁴ to reconcile the dispossessor and the dispossessed was made impossible by the fact that remorse and repentance were not put as preconditions during the Truth and Reconciliation hearings. Instead, perpetrators of apartheid atrocities were allowed to apply for amnesty (Lephakga 2015; Baron 2015). This resulted in a blanket amnesty, where the entire process was de-historicized, decontextualized and individualized, robbing most black people of justice, dignity, and human rights (See Mamdani 2002; Lephakga 2015; Baron, 2015).

As noted by Volf (1996), the result was cheap reconciliation which did not centre on justice (i.e., restitutive justice). Indeed, this sentiment is shared by leading scholars and commentators like Allan Boesak, Tinyiko Maluleke, Mahmood Mamdani and Sampie Terreblanche.

This study argues that black people in South Africa still need economic justice whilst white former oppressors need reconciliation and integration into national life. Much of the public discourse concerning nation-building in post-apartheid South Africa has often emphasized reconciliation at the expense of socio-economic justice.

The study suggests that post-apartheid South Africa needs a “*Zacchaeus moment*”, where genuine commitment to socio-economic justice and reconciliation will be inaugurated. Indeed, some have called for an “Economic CODESA” to deal with the socio-economic legacy of colonialism and apartheid. Former white oppressors need to genuinely repent of their colonial and apartheid sins and voluntarily commit to socio-economic restitution whilst black people need to forgive and accept their white counterparts into their community and national life. The study demonstrates how the Zacchaeus micronarrative in Luke 19:1-10 provides a classical model of how this

²³The 2018 bill was published after expropriation without compensation was highlighted as a mechanism for land reform following statements made by the EFF. The policy was adopted by the ANC at their 2017 elective conference, where Cyril Ramaphosa was elected as President of the party. This initiative also resulted in extensive public hearings, and the formation of an ad hoc Parliamentary committee that was tasked to advise Parliament on the amendment of the Constitution to allow for expropriation without compensation. Debate is however raging on whether expropriation must be compensated or not. The work of this committee continues.

²⁴The South African Truth and Reconciliation Commission (TRC) was set up by the Government of National Unity to help deal with the racial conflict that happened under apartheid.

genuine socio-economic justice and reconciliation project between the oppressors and the oppressed can be realized.

Terry-Oakley Smith suggests that “white South Africa got scot-free in 1994, did not offer any apology, do not have the grace to appreciate the (race-relations) issues in South Africa, continues to enjoy ill-gotten privileges of Apartheid, and did not pay any reparations for Apartheid” (Morning Live interview, 1 May 2017, in Motuku 2018). For example, important documents like the Freedom Charter and the South African Constitution of 1996 guarantee the place of both Blacks and Whites in the South African society. This study therefore argues that despite the socio-economic injustices and political atrocities of the colonial and apartheid past, black and white South Africans share a common destiny and as such they, like Zacchaeus, are redeemable. To achieve this moral vision, the study appeals to the Spirit-motif in Luke as a probable agency for peace with God (vertical), and peace with one-another (horizontal).

As underpinned by Netshitenzhe (2016, 2020), the social-economic transformation project in post-colonial South Africa is a complex balancing act. Here, the struggle liberators must manage and lead the former white oppressors and their black victims in a small open economy affected by global markets. This must take place within a democratic capitalistic system, [under a liberal constitution that guarantees the rights of both] (addition mine). Leading economist Sampie Terreblanche believes that socio-economic justice is necessary to end inequality in South Africa (Terreblanche 2002, 2012).

1.6. LITERATURE REVIEW

Indeed, the “freedom charter” which is the founding vision of an inclusive non-racial, non-sexist, democratic, and free South Africa declares among others that “the people shall share in the country’s wealth” (Motuku 2018)

Most studies of Luke’s wealth-poverty ethics swing on either side of the theological pendulum; thus, a sense of ambivalence exists in Lukan studies on wealth and poverty. For some scholars who represent hegemonic powers and hermeneutical methods, Luke’s message on wealth and poverty is too inconsistent, and impractical to provide any ethical guidelines for the capitalist contexts in which they exist. Their theological

viewpoints make Luke oblivious to the socio-economic injustices of imperialism and colonialism, only serving to safeguard the interest and gains of the elites. The result, as noted by King (2019), is the taming of Luke's radical message, and its reduction to what is possible, probable or common-sense. On the other hand, there are those who tend to hyper-ideologize the text of Luke to pulsate a radicalized Lukan message everywhere in the text, to reduce Luke's message to a political manifesto devoid of theological moorings. For these scholars, the radical message of Luke is evident everywhere in the text, as it palpitates throughout the text into the ultimate chapter. Yet others elect to be oblivious to the socio-economic implications of the Lukan message to the Graeco-Roman world for fear of its import for their contemporary situation, choosing a rather personal, private, and spiritual reading of Luke.

Turner (1987:95-96) has noted this commonplace tendency to either be biased to the poor or to spiritualize Luke's "handling of the theme to the point that he has nothing of practical significance to say on the question of wealth at all". Prior (1995) calls for a contemporary reading of issues of wealth and poverty in the Gospel that go beyond individualistic and pietistic solutions to these complex social problems.

Moreover, the history of interpretation of Luke shows that early reading strategies sought to discern normative and binding instructions, commands, rebukes, and guidelines in matters of wealth, possession, and attitude towards the poor (see, e.g., Verheijen 1976:48-66; Johnson 1977:1-2; Olsen 1984:341-53; McGee 1990:163-78; Phillips 2001:5-44). As noted by Phillips (2003:232), these early reading strategies focused on isolated Lukan texts, analysing traditional forms and the history of transmission of these forms, and often disregarding the broader Lukan context.

Contemporary studies on Luke, however, seem to break away from this early tradition by seeking "to offer consistent readings of various aspects of 'Lukan theology'" (Phillips 2003:232). The challenge, however, is the proliferation of reading methods, which make it difficult to extract a reading strategy that takes into cognisance the diverse perspectives of the Lukan wealth-poverty motif. Motuku (2010:53) has warned that the "danger of every single hermeneutical method in the exegetical process is their invariable adherence". Reading strategies are useful, given the specific interest in the text of Luke, though a temptation might exist to selectively adhere to a specific reading

strategy while disregarding other perspectives to the point of deifying method at the expense of critical scholarship.

Donahue (1989:135) has noted that even though a consensus exists on the importance of possessions in the Lukan corpus, there are inconsistencies in perspectives, and disagreements in the interpretation on major issues such as the dispossession of goods, common possessions, and almsgiving.

Investigation into Luke's reading strategies reveals that at least two which dominate namely, redaction-critical readings, and symbolic readings outside the popular reading of the Lukan wealth-poverty motif. Popular readings of Luke neglect the diversity of perspectives in Luke, oversimplifying complexities, intricacies, and peculiarities of the postures of Jesus in dealing with the wealthy in the text. They make light of the nuanced understanding of the poor in the text, and do not account for the diverse perspectives in the text.²⁵ Cassidy (1978), for example, is a proponent of a popular reading of Luke.

Redaction-critical studies have argued for consistent readings of Luke by first-century readers, with the Roman imperial world as their context, and their own religious experiences and extra-textual knowledge as a prism. Symbolic reading perspectives, on the other hand, perceive a consistent symbolic function of the wealth-poverty texts throughout the gospel of Luke.

1.6.1. KEY SOURCES

Degenhardt (1965) suggests a two-tier ethic reserving total renunciation of wealth to ecclesiastical office-bearers whilst the rest of the believers are admonished to employ an ethic of "Christian love activity". This speaks of the perceived inconsistencies in the Lukan radical message of economic justice. This study suggests that in the context of Luke 19:1-10, Zacchaeus's act is not one of Christian benevolence but of retributive justice.

²⁵For the treatment of diverse perspectives and nuances of the term 'the poor' see 'literal connotations of the term 'poor' in Luke' (Bammel 1968; Hoyt 1974; Albertz 1983; see Phillips 2003:235); 'pious poor' or spiritually needy (Ernst 1977; Lohse 1981; Dietrich 1985; De Villiers 1986; Balch 1995; see Phillips 2003:235); 'socially and religious marginalized' (e.g., Sabourin 1981; Bergquist 1986; Aymer 1987; Beavis 1994; Green 1994; see Phillips 2003:235); and 'eschatological character group who highlights Jesus' messianic role' (Meadors 1983, 1985; Roth 1997; see Phillips 2003:235).

Schmithals (1973-1974) resolves the tension between renunciation and hoarding of wealth in Luke by suggesting that those faced with persecution are to renounce their possessions if (and only if) their persecutors forced them to choose between apostasy and confiscation of their goods. Those with favourable conditions were called upon to practice generosity toward those who had suffered the loss of their possessions for the sake of Christ. Is Zacchaeus' act in Luke 19:1-10 an act of renunciation in the face of a persecuting murmuring crowd? The study suggests that Zacchaeus's voluntary act is one of genuine repentance in an effort to reconcile with his estranged community.

Karris (1976:219-233) places the radical message of Luke squarely at the door of the rich. However, this study suggests that the poor are not completely absolved, and that they need to partner with the rich to realize the vision on economic justice and reconciliation.

Johnson (1977) sees Luke's possession motif as playing a metaphorically symbolic yet intelligent and convincing literary function of weaving a dramatic pattern of authority from Jesus to the twelve apostles and the early church. "Luke sees the way a man handles possessions as an indication, a symbol, of his interior disposition" (Johnson 1977:148). Whilst Johnson (1977) has well argued the "literary function of possessions", he misses an opportunity to comment on Luke's historical and social occasion of the motif. He thus makes the nuances of Luke's historical and "literal" message on wealth-poverty motif and their ethical implications to be lost in an idealized analysis of personal responses of the rich and poor to Jesus (see King 2019). Even in later writings, he downplays the economic themes and brings out non-economic themes, like healing and inclusion of the marginalized (King 2019).

Pilgrim (1981) attempts to reconstruct the historical practice of Jesus and his followers regarding possessions and perceives a diversity of traditions in Luke's gospel. These include a demand to leave all possessions, dangers posed by possessions, and the right use of possessions according to Luke (Pilgrim 1981:85-102, 103-122, 123-146). His efforts to avoid the "spiritualizing" of the texts dealing with possession (Pilgrim 1981:14) and assertion of the social dimension of Luke to provide Lukan ethics of discipleship for his contemporary practice is applaudable. Nonetheless, his conclusion

that the demand to leave all possessions was only limited to Jesus' ministry without any rationale for this tacit assumption is unconvincing.

Seccombe (1982) spiritualizes Luke's gospel by failing to see the "the poor" in Luke in socio-economic terms. The poor are reduced to Israel in need of "religious redemption and political deliverance" (see Goldsmith 1985). His eagerness to prove that Luke does not advocate for asceticism and renunciation of possessions precludes him from seeing Luke and Jesus as champions of the dispossessed "proletariat" (Seccombe 1982:188; Topel 1985:277). Obvious renunciation material in Luke is referred to as atypical or given a hyperbolic meaning in an effort not to depict Jesus as a social reformer, thus defanging Luke's radical message. Seccombe (1982) further reduces Luke's attribution of "poor" to charity-ethics in attempting to reconcile the contradictory material on wealth-poverty, thus letting the rich go free from any obligation towards the poor except for voluntary sharing. Seccombe fails to employ his own ideological assumptions to ask a critical question of how the rich acquire their wealth in the context of religious poverty and political oppression.

According to Johnson (1987:302), Schottroff and Stegemann (1986) offers a "lucid, elegantly argued analysis" of emerging consensus on issues of wealth and poverty in the Lukan corpus. He reconciles the contradictions in Luke by consigning Luke's radical message to the past whilst advising against literal appropriation of Luke's message. The rich are thus called upon to practice an ethic of sharing their resources with the poor. Stegemann's relegation of the renunciation ethic to the past is unsubstantiated, whilst his ethic of sharing only serves to defang Luke's radical message of economic divestiture.

York's (1991) demonstration of the bi-polar reversal theme in Luke highlights the contradistinction between God's economy and the hegemonic Roman economy. York's failure to see the dominant cultural constructs of honour-shame and patronage in economic terms, however, de-emphasizes Luke's radical message on economic justice.

Prior (1995) undertook a similar study to this one when he employed the liberationist method of social analysis and political option in Jesus' inaugural sermon in Luke 4:16-

30, focusing on this sermon's theme of liberation within the larger context of Luke. Prior's asserted that "no *sensitive reader* can fail to be alerted to the social obligations implied in the Lukan call to repentance" (Prior 1995:192; emphasis added). Moreover, his he found that it is "impossible to escape the conclusion that the Lukan theme of rich and poor must leave any Christian community fundamentally disturbed in the face of serious inequalities of wealth and social security in its own community" (Prior 1995:193). This conclusion resonates with this study. His call for modern Christians "*to subvert, rather than underpin, those cultures which produce poverty and ignore the plight of the poor*" is relevant to this study (Prior 1995:194; emphasis added). Prior, as is the case with this study, believes that Luke's message is inherently political and has the potential to rearrange society to achieve the goal of liberation²⁶ (Prior 1995:195).

This view is aptly summed up by King (2019:81) as follows:

Luke's Jesus explicitly says that his ministry is primarily about liberation. And not just spiritual liberation. Liberation from oppression. Liberation from poverty. Liberation from debt. Liberation from alienation from the means of production. These are the principles of God's Empire. This is what gospel looks like.

Kim (1998) reads Luke's focused interest in wealth-poverty motifs against the backdrop of the extremes of Graeco-Roman's political background, with its scant interest in the poor. Kim explores the themes of discipleship and stewardship and "suggests that different sets of economic standards in Luke apply to two different types of disciples; "itinerant" disciples must renounce all possessions, while "sedentary" disciples need not" (King 2019:7). Phillips (2001) places attitude above disposition and sees no need for radical divestiture for as long as wealth does not distract from one's relationship with God. Metzger (2007) acknowledges the radicality of Luke's message in his treatment of the four parables in the travel narrative. King (2019) employs redactional, literary, statistical, historical, and theological methodologies to help us recover Luke's radical economic message, placing it in its ancient context and teasing out its prophetic implications for today. King is most useful in his rebuttal of mis-readings of Zacchaeus story and identifying logical flaws in deradicalizing Zacchaeus action.

²⁶ For the treatment of the Jubilee theme with the reversal motif, see (Sloan (1977), Sanders (1993), Blosser (1979), and Ringe (1985).

1.6.2. PRELIMINARY CHAPTER OUTLINE

Chapter 1 introduces the thesis of the study, provides a literature review of relevant major works on the Lukan economic message, and introduces the main method of the study, and subsidiary methods of approach at various levels in the study.

Chapter 2 (Lukan wealth-poverty ethics) analyses Luke's material on wealth, poverty, the rich, the poor, and money to underscore Luke's radical economic message.

Chapter 3 (Luke 19:1-10: History of interpretation) evaluates the history of interpretation of Luke 19:1-10 over the years and underscores Zacchaeus' radical response in the context of the overall Lukan economic message.

Chapter 4 (The Roman imperial economy) explores the Roman economy in its various institutional forms and regimes and how it exploited the colonized peasant subjects in Roman-Palestine to highlight the radicality of Zacchaeus' response to the economic message in Luke 19;1-10.

Chapter 5 (Traces of the colonial, apartheid, and post-apartheid South African economy). This chapter examines the trajectory of the colonial, apartheid, and post-apartheid South African economy and its contribution to racial and class inequality. A special reference will be given to the land question.

Chapter 6 (Luke's message as counter-narrative: Application, summary, and conclusion) applies Luke's radical message to the current socio-economic state of South Africa as a radical alternative. It summarizes the moral vision of this message and makes concluding remarks and recommendations.

Chapter 2

Lukan wealth-poverty ethics

Any religion that professes to be concerned about the souls of men and is not concerned about the slums that damn them, the economic conditions that strangle them and the social conditions that cripple them is a spiritually moribund religion awaiting burial (Martin Luther King Jr)

This chapter will analyse Luke's material on wealth, poverty, the rich, the poor, and money to underscore Luke's radical economic message. The focus will be on the foundational texts that are both paradigmatic and programmatic for the Lukan narrative.

The chapter will first look at Luke's special interest in socio-economic matters and how this context influences his narrative and will then give a cursory look at the various interpretive lenses of his message. The next focus will be the infancy narratives with special attention on the Lukan songs from the margins by the recipients of the Lukan message of "good news to the poor". The Nazareth Manifesto will then be revisited and its strategic prophetic import for the Galilean Nazareth conquered audience will receive attention. Lastly, the beatitudes which serve as a didactic foundation of Jesus for the alternative vision of life in God's Empire contra Rome's Empire will be analysed.

2.1. LUKE'S INTEREST IN SOCIO-POLITICAL AND ECONOMIC ISSUES

Commentators and scholars have always emphasized Luke's specific interest in socio-political and economic issues (Scheffler 1990:21).²⁷ Luke appears to be paying more attention to these issues than any other New Testament author (see Cassidy & Scharper 2015). The twin Lukan interests in socio-political and economic matters draw close attention to Rome's repressive legionary presence through soldiers and by parasitic economic exploitation through tax collectors. This tax burden brought the Palestinian provincial economy to the brink of collapse stemming an outright revolt from the peasant masses (Burrus 2009). This is a significant factor in the study of social conflict in Roman Palestine. Fundamentally, it was one of class, because of contrasting

²⁷ Scheffler points to references by Guthrie (1970:90-92), Cassidy (1980; 1987), Cassidy and Scharper (1983), and Ford (1984); (see Scheffler 1990:21).

and competing ideologies, visions, and value-systems between the minority political-religious elites and the mass of non-elite peasants (Jacobs 2018).

The Empire's wealth was based on land ownership (Carter 2006). The interconnected exploitative imperial economy favoured the oligarchs at the top of the socio-political hierarchy. These expropriated produce from ordinary peasant workers, artisans and farmers through rents and taxes, tolls and tributes, amassing wealth to fund their extravagant lifestyles and incessant consumption appetites (see Carter 2006:100). Thus, the majority's hard manual work sustained the excessive lifestyles of the few, that is, economic structures were exploitative and unjust. This informs Luke's inordinate attention to wealth-poverty issues relative to other canonical gospels (Sherouse 2013:285). The assertion that "Luke's primary concern is not wealth itself, but the way wealth is obtained and employed" will be explored further in the ensuing chapters (Sherouse 2013:285). These socio-political and economic realities, therefore, render Luke incomprehensible outside the Empire as its historical setting (Seo 2015).

In contrast to Matthew, Luke is more concerned with economic justice than with justice in general (Bosch 1991:117). King (2019:40) employs a simple accounting method to deduce that Luke's interest in economic issues is greater than other synoptic traditions, that is, Luke goes so far as to double the quantity of content he gets from Mark and Q by providing his own. According to King (2019:43), 359 (31%) of Luke's 1151 verses include economic concerns, and that's a fourth of the gospel, with financial ramifications signifying that Luke is concerned with economic matters. Moreover, it is significant that half of Luke's references to economic matters have no synoptic parallels from other gospels (King 2019:43). This affords Luke a reputational uniqueness among the gospels in his emphasis on socio-economic aspects of Jesus' mission (Liefeld 1984:801; King 2019). Luke collapses a quarter of each material from Mark and Q and matches the sum of the joint material with fifty percent of his own unique material (King 2019:42). Overall, the distinctive Lukan material contains more economic substance than Mark and Q, drawing the landscape of Luke's economic material more than the sources from which he writes his gospel (see Honoré 1968; King 2019).

According to Carter (2016:202), the Roman rule and context is the milieu under which Luke's gospel was written. Luke also locates Jesus' ministry within the timing and

power structures of the local, provincial, and regional Roman imperial system.²⁸ The Roman Empire is thus not only the background of the Lukan writings, but also its foreground, an assertion made by Carter (2006) elsewhere regarding New Testament writings generally.²⁹

Roman control, and Greco-Roman ideals and mores shaped the social and political context of the New Testament as a whole (Pickett 2009:424). Furthermore, Luke's literary genius comes to the fore as he appropriates the literary conventions of historiographic prose to set the narrative of Jesus and his followers within the broader context of Roman/Judaeian politics (Burrus 2009). Luke's gospel, more than any other, is influenced by political, social, and economic factors (Park 2004). From the onset the Empire is present through the mention of its client-king Herod,³⁰ the king of Judea (Luke 1:5); a controversial historical character, known to be one of the most vicious and ruthless kings in Jewish New Testament history. The unscrupulous patronage network between Rome and the proselyte Idumaeian dynasty³¹ wielding power in Judaea and resulting in the pillaging of regional resources through Roman legionary force is the political context for Luke's readership (Burrus 2009:134).

Historical anecdotes show that Herod was a much-hated figure in Christian circles. The hatred was perhaps exacerbated when Herod gave the order to have all the young boys in a tiny village and its surroundings slaughtered, believing one of them to be a potential contender to his kingdom, even though he would never have seen the young child grow up, and knowing he was dying (Wallace 2018:5). This was the "last throes

²⁸ This is a reference to the Roman emperor Tiberius and the governor of Judea, Pilate, along with Rome-appointed high priests of Jerusalem, Annas, and Caiaphas (Luke 3:1-2a) as highlighted by Seo (2015:202).

²⁹ Carter (2006: ix) suggests that it could be a misnomer to talk about "Roman backgrounds" to the New Testament; he understands "Rome's Empire to be the foreground". "This is the world in which first-century Christians lived their daily lives.... It is the world that the New Testament writings negotiate throughout" (Carter 2000: ix). Winn (2016:1) also considers the way in which the Roman Empire and its ubiquitous power and influence might be a foreground for understanding Christian theological expression, mission, and practice, and how the New Testament texts might be critiquing the evils of the Roman Empire.

³⁰ The mention of Herod seems to legitimize his kingship even though much of the Jewish population regarded it as illegitimate. Luke seems to use accommodation strategy of post-colonial studies to navigate the turbulent waters of first-century Jewish socio-political context.

³¹ Herod was a half-breed Idumean who became a Roman client-king marrying the Hasmonean princess Marianne to solidify his reign. According to Africanus he burned the temple records of genealogy "thinking that he would appear to be of noble birth, if no one else could trace back his descent by the public register to the patriarchs or to the proselytes, and to that mixed race called "*geiora*" (see Guignard 2011:69).

of personal madness” (Wallace 2018:5). This act of madness by Herod exemplifies the assertion made in this study that profit and wealth are potentially detrimental to both the pursuer, holder, and those perceived to be obstacles in the exercise of its accumulation. The Empire would stop at nothing to maintain its hegemonic rule and maximize its profit.

The inferred dominating cultural structures engraved into Luke’s storytelling are the patronage system and reciprocity ethic (Pickett 2009:431). Luke thus pits the actions of unscrupulous characters who are consumed with power, prestige, and popularity, against those who demonstrate God’s justice and concern (Pickett 2009:425-426).

More relevant to Luke’s economic interest is the stringent edict of the Roman emperor Augustus Caesar, for a universal census whose “dual purpose was taxation and social control” (Seo 2015). Pearson (1999:276) alludes to the multiple ways in which censuses were used to keep subjects under control. Luke’s mention of political-religious rulers in the beginning of the Gospel implies not just a repressive political system that transfers wealth from the poor to the rich, but also economic exploitation through taxation (Wi 2017). The Lukan text marks the formidable influence of the Romans both by the imposed power of taxation conveyed by the census and by the presence of a Roman governor in the neighbouring province of Syria (Burrus 2009:134).

A direct relationship existed between census and taxation, prompting Capponi (2005:84) to suggest that the Roman census under the Empire was more about ensuring “a record of people liable to compulsory services such as the corvee works on the canals, and to extract other capitation taxes”. Consistent with all colonial projects, this Lukan Roman census with its attendant taxation was an expression of key characteristics of colonialism and imperialism namely, domination and subjugation of the occupied people. It is noteworthy that Luke is the only gospel juxtaposing the birth of Jesus with Roman rule and the burden of taxation thus highlighting the economic misery of the occupied people under imperial domination (Pickett 2009:424-425). While the actual timing of the census is a debatable matter, Luke finds the reference crucial to his historical framing of the birth narrative.

Whereas some see in the census the cooperation of the Empire with God, Carter (2010) discounts this as a matter of contrast and criticism, not cooperation. Carter explains: “The census is an instrument of imperial rule and domination. Empires count people so that they can tax them to sustain the elite’s exploitative lifestyle” (Carter 2010:29). Luke describes the political and socio-economic context of Jesus’ birth by mentioning the census linked to the Roman taxation *tributum capitis* (Green 1999:124-125).

Profit has always been the driving force and goal of imperialism, almost always resulting in the financial slavery of natives and the exploitation of their natural resources (Perdue 2005:282). It is no wonder therefore that Luke, writing from the Roman imperial context, would have special interest in the economics of the Roman Empire in contradistinction to the economy of God’s Kingdom.³² This early mention of imperial representativeness and its machinery to extract profit from the subjugated people not only helps us to understand the broader Roman political economy but is also programmatic of the themes, perspectives, and motifs in the narrative as it unfolds.

Coleman (2019) considers the first four chapters of Luke’s Gospel as foundational for the interpretive lens of the narrative as it unfolds). She rightly points that “Lukan introduction has been carefully crafted as an intentional stage setting for the themes, structure, and purpose of the larger work” (Coleman 2019:6-7). The opening unit thus provides an important anti-imperial hermeneutical lens for reading and making sense of Luke’s thematic preoccupation with socio-political and economic dynamics in the Empire.

In this regard, Tannehill (1996:40) aptly states:

What the narrator presents first, affects the reading of the rest of the story ... the beginning of the story will make an impact that the skilled narrator can use to good effect ... the beginning of a narrative can be used to influence the reader’s understanding of everything that follows.

³²Carter notes that the Greek work translated “kingdom” in Luke can also be translated “Empire”.

The annunciation, conception, and birth of Jesus is placed within the socio-political and economic events of the first-century Roman world (Luke. 1:5; 2:1-2). By situating his response in the historical and geographical context of imperial Rome, Luke positions his literary answer to imperial Rome in time and space (Medina 2005).

According to Pickett (2009:425), Luke envisions a counter-cultural way of life by telling the story of Jesus rhetorically as a counter-narrative, seeking to influence the thoughts and behaviours of people in line with all ancient world texts (Pickett 2009:425). Pickett takes cues from Stone-Mediatore (2003:6) who asserts that narratives elicit experience and social practices, and thus contribute to critical thinking and liberatory politics. This '*historical situatedness*' of Luke's gospel, makes Luke keenly aware of his colonizing situation (Medina 2005). Thus, Luke's theology is etched from the socio-political and economic dynamics of the first-century Graeco-Roman world. The comparisons between the protagonist families in the opening unit, and their station in life; the annunciation, and subsequent birth, presentation, and boyhood and separate missions of Jesus and John are nuanced by reversal categories relevant to anti-imperial discourse (see Coleman 2019).

Luke grounds the subject of good news to the poor early on in his gospel by use of key texts to characterize God's Empire (King 2019:72). This developing programmatic agenda manifests in the preaching of God's Empire and has practical acts of social justice as evidential marks of repentance and piety (Afulike 2018). Social justice and God's Empire are inextricably intertwined, whilst the preaching of God's Empire is embedded in socio-political and economic realities of first-century Roman Palestine.

In the introductory unit, a more detailed political program on the preaching of John is evident some three decades after the annunciation, conception, and birth narratives Burrus (2009). Luke's message therefore cannot be divorced from the concrete and practical socio-political and economic conditions of the land. For example, Luke's use of the word "salvation" and its cognates is unmatched in any other gospel (Pickett 2009:426). Pickett points out that the political power of this word is based on the restoration and liberation of Israel from her adversaries, and ultimately, all nations from their foes (Pickett 2009:426-427). At the heart of salvation is God's mercy correcting

global injustices and championing the cause of the poor (Wi 2017:5). The goal is to transform the socio-economic divide between rich and poor (Wi 2017:5).

Medina (2005:4) perceives an “internal multivocality” in Luke’s posture to imperial Rome. On one hand, Medina challenges “imperial romanticism” and “idyllic/optimistic ideations” of the hegemonic historical-critical method and approaches characteristic of Western scholarship. These intellectuals view Luke as an exclusively pro-Empire document whilst on the other hand, warning against “simplistic negativism” characterized by “ostracism- and its ensuing socio-political isolation” as Luke’s “political-ideological aspiration” often espoused by those like me reading Luke from “below” (Medina 2005:4).

Medina (2005:5) further refers to Luke’s language as “colonial rhetoric of congeniality”, that seeks to undermine the imperial Roman value-system from within. This literary and rhetorical multi-vocality is of special interest to anti-imperial scholars in their argumentation for anti-imperial language in the New Testament (Hebert 2014). Far from being literary advocates of Roman imperial romanticism, as some historical-critical scholars would want us to believe, Carter (2015) for instance demonstrates that New Testament writers employ different literary techniques to get their message across to their audiences. He notes that numerous adaptive strategies are used by the colonized and occupied peoples as demonstrated by various post-colonial studies.

Depending on the colonial regime of the time, different tactical responses may simultaneously co-exist, such as accommodation and cooperation, dissembling and ambivalence, competition and mimicry, and opposition and resistance (Carter 2015). These multivalent responses signify the complexities of life for the colonized peoples as they seek to adapt to colonial intrusion with their own native paradigms, and to make sense of their forced new existential realities. Luke thus employs a protest language of subversion, to manoeuvre the complex world of marginal living literarily and rhetorically in a colonial context, whilst undermining the imperial value-system at the same time, negotiating survival from within that dominant value-system. Therefore, what appears to be a positive and deferential description of Rome is often a veiled form of political resistance (Medina 2005). Luke challenges the fundamental ideals and systems of the

Greco-Roman society, presenting an alternative vision of life in a neatly constructed counter-narrative (Pickett 2009:424).

This is relevant because some scholars and commentators have tried to render Luke as either a-political or Empire-friendly, thereby weakening his radical message. These scholars assert that the Lukan pronouncements and representation of the imperial Rome with its officials and military personnel and its administration are uniformly friendly and positive. Accordingly, Luke's primary agenda is to provide a narrative *imperial apologia*.

Conzelmann (1982) is perhaps the *high priest* of the pervasive view of Luke as a pro-Empire document. Conzelmann pioneers the school of thought that Luke is providing an apologetic with the purpose of convincing and persuading the Roman authorities that Christianity is not a threat to their Empire's political stability. Because Luke portrays Jesus' actions as apolitical, these scholars argue that the Church does not pose a threat to the Roman Empire. This view, as noted by Medina (2005), indirectly renders the early church subservient to the Empire and makes Luke's writing to be viewed as politically non-threatening "Empire friendly" literature. This blissful apolitical hermeneutic remains in the domain of much of the traditional historical-critical scholarship (Medina 2005). The result is that the ideological dimension of Luke's theological message and its political import to imperial, colonial and exploitative rule is deliberately ignored and rendered inconsequential. The delay in the Parousia, according to Conzelmann, prompted Luke to assist the church in coming to terms with the Roman Empire. Since the immediate eschatological anticipation was repeatedly pushed into the distant future, Luke felt compelled to assist his congregation in adjusting to the fact that the Roman Empire was still there to stay for a while (Ammousou 2014).

The imperial positivism of the historical-critical method contributes to the widely held view of the Lukan text as supportive of, or at the very least, uncritical of Rome and consequently imperialism in general. This promotes and strengthens the hegemonic place of modern imperialism and colonialism in both the academy and practice (Medina 2005). On the other hand, some advocate for *religio licita* (religion that is legally recognized), the belief that Luke is attempting to demonstrate that Christianity is a

subset of Judaism so that Christians might enjoy the same religious freedom as Jews under the Roman Empire (Seo 2015).

Conzelmann's theory, according to Ahn (2006), is based on a simple dichotomy of religion vis-à-vis politics: Conzelmann's emphasis on the duality is revealed by the term "political" apologetic. According to Ahn, proponents of the "political apologetic" argument believe that Roman officials could tell the difference between what Luke says to the church and what he says to them. According to Ahn, Conzelmann and later Walaskay (1983) failed to consider the colonial link between Jewish leaders and the Roman Empire, nor interpret Jesus' disagreement with the Jerusalem leadership from the perspective of the Roman Empire. The ecclesial apologetic becomes untenable due to a failure to consider the colonial condition (Amoussou 2014).

Esler (1987) forged a new path with his theory, claiming that Luke writes to reassure his fellow Christians that their faith is compatible with the Empire. Richard Horsley (2004) suggests that the early Christian community utilized "hidden transcripts" in their criticisms of Rome. Applying Scott's theory to the New Testament, Horsley believes that early Christians may have used parallel language as a means of a veiled criticism of Rome (Horsley 2004). The monumental work by Scott (1990) delineates between "public transcripts" and "hidden transcripts". The former are superficial narratives dictated and controlled by the elites regarding their interaction with the subordinates. Hidden transcripts are dissenting viewpoints in discourse and practice, dictated and controlled by the oppressed to refute in action, speech, and belief the hegemonic public show by the dominant elite.

Scott demonstrates that the reaction of subordinate, marginal, and disempowered peoples to dominance is much more than subservience or rebellion. Hidden transcripts do not conform to sociological and anthropological criteria such as open rebellion and armed revolt as the only forms of resistance (Scott 1990). Hidden transcripts are "offstage" intermediate opportunities for the oppressed marginal peoples to state their true feelings and opinions about the *status quo*, often signifying that their perceived façade of compliance is simply a survival mechanism. Their ability to absorb pain and degradation is not to be confused with acceptance of the dominant culture on the public

stage (see Miller 2014). Scott's work has helped in recognizing power relations and history in texts unlocking new dimensions in New Testament approaches.

Warren Carter (2006), for example, does consider the New Testament writings as "hidden transcripts"; they are not public writings targeting the elite or addressed to any person who wants to read them (Carter 2006:12). Rather, these texts are written from and for communities of followers of Jesus crucified by the Empire (Carter 2006:12). As such, the New Testament writings assist followers of Jesus in negotiating Rome's world (Carter 2015:12). New Testament writers demonstrate that life in the Empire was approached in various creative ways by Christ-followers (Diehl 2011). Some of their suggested ways of living mimicked the very patterns of the Roman world while rejecting the dual options of "total escape" or "total compromise" of the imperial Roman order (Diehl 2011:23; Carter 2006:12-13).

Other scholars note that the New Testament authors employed "subversive language" to communicate their message. The anti-imperial scholarship argues that "NT authors did employ subversive rhetoric in their communications with their audiences within the Roman Empire" (Diehl 2011:11). Accordingly, the New Testament authors wrote in a politically charged context because of their immediate socio-political, and religious, conditions, which necessitated them to be cautious about their messages for their personal safety and that of their readers. Certainly, explicit language and direct anti-government or anti-emperor literature would have been quite dangerous. Such writing could have resulted in the death of the ones communicating opposition to the ruling authorities and/or the audience to whom they wrote (Diehl 2011:11).

Godawa (2009:115) defines "subversion" as "radical interpretation or undermining of commonly understood images, words, concepts or narratives". According to him, subversion is key in making sense of the New Testament writers and their "negotiation" (Carter's word) of Rome's imperial culture (Diehl 2011:21). His final analysis is that certain features of the New Testament writings should be interpreted as "subversion" of the dominant socio-political and cultural institutions of the Roman Imperial order (Godawa 2009:134). The New Testament authors wove together an arrangement of Greco-Roman philosophy and Jewish imagery into a uniquely Christian rhetoric (Diehl 2011:21). The gospel writers did not fall into "syncretism" but redefined the pagan

worldview in terms of Jesus Christ and the Christian perspective (Godawa 2009:121). According to Godawa, they did this to further the cause of Christ's gospel (Godawa 2009:121).

Jesus and his initial adherents, referred to in the New Testament gospels, had a "strong desire for liberation from Roman political, economic, and social oppression Beck (1997:16). This assertion leads Beck to believe that "there are probably more coded messages (anti-Roman cryptograms) of hope and liberation (in the New Testament) ... than we have realized throughout most of the history of interpretation" (Beck 1997;17). The coded Christian messages switched from their original understanding in communities led by Jesus and his disciples to an imperial understanding with the official recognition of Christianity as a state religion (Beck 1997:17). Beck aims to show the modern man how persecuted, threatened, and estranged people of the New Testament used coded hidden messages (Diehl 2011:22).

Jewett (2006) acknowledges that criticisms of the Roman Empire were not veiled at all, but rather offered more overt contrasts between the kingdom of God and the kingdom of Caesar. In the realm of the New Testament, Luke is a compelling example of a hidden transcript of political struggle (Amoussou 2014). Luke's ultimate purpose is to prepare his audience for a kingdom other than Caesar's and his client kings in the first century Greco-Roman world (Amoussou 2014). In terms of Scott's classification, the gospel text itself is a "public script", whilst Luke's coded message of resistance is a "hidden script" (see Coles 2020). Prior to Scott, much of the Lukan scholarship regarded Luke at face value as an *apologia* subservient to the Roman regime (Medina 2005). Scott's theory helps us go beneath the surface with a fresh look at Luke's gospel, to discern hidden transcripts invisible to the untrained eye (Coles 2020:42). Indeed, as shall be demonstrated, fresh hermeneutical textual meanings emerge when our interpretive perceptions go beyond the surface script and embrace the covert message of Luke encapsulated into his gospel.

Horsley (2004) perceives "Q" in Luke's primary source. This is a hidden transcript emerging from and representative of the peasants' ideals and aspirations from the margins. He agrees with Scott's theory of a camouflaged ideological resistance that charges that Luke's Jesus does not have to lead an armed assault on the temple or

Roman military to effect a revolutionary change. The fact that neither Luke nor Jesus ever explicitly advocated for a revolt does not mean that they were compliant with the Roman Imperial system (Horsley 2004). For example, Scott's theory revolutionises Luke's gospel by revealing that Luke disguises his defiance in such a way that the Roman authorities have no reason to suspect opposition. Scott's approach has also revolutionized the way texts narrating power dynamics between the dominant and subordinates are analysed (Coles 2020). That Luke would call for disciples of Jesus to be compliant with the dominant Roman culture whose ethos is diametrically opposed to that of God's Empire is absurd. Scott's theory helps us move from a middle-class interpretive obsession with personal salvation and otherworldliness in the interpretation of Luke to discerning socio-political and economic justice motifs in Luke's theological message.

Luke is a counter-narrative against the backdrop of imperial society, subverting the dominant ethos and practices that underpin Greco-Roman society whilst presenting Jesus and his followers as representatives of a marginalized experience, advocating for a subaltern politics, namely the "kingdom of God" (Pickett 2009:426). For Medina (2005), Luke is a theological work whose ideological worldview encourages colonial resistance. It adopts a variety of approaches and tactics to traverse the intricate maze of colonial existence, depending on the colonial context at various stages in the narrative.

2.2. PRIORITY OF THE POOR AND RESISTANCE TO WEALTH

Frequent references of Luke as "the gospel of the poor"³³ are replete amongst Lukan scholars (Degenhardt 1965; Schmithals 1975; Pilgrim 1981; Scheffler 1990) amongst others. This is because ministry to the poor is characteristic of Jesus' mission and descriptive of his vocation. The term "good news to the poor" captures the essence of Jesus' job description (Green 2014). Kings (2019) reads in Luke's economic message a prophetic cry of justice for the destitute, downtrodden, and disadvantaged, warning against wealth's destructive influence. According to King, the two cardinal tenets to this radical Lukan message are good news for the poor and a call for resistance to wealth

³³ Of the 34 occurrences in the New Testament of the term *πτωχος* (poor), Luke uses it 10 times (Scheffler 2011).

Luke's message represents a significant departure from the ancient Roman Empire's prevalent ethics, as well as presenting a significant challenge to modern international economic systems. Luke's message depicts God on the side of the poor, advocating their cause for justice, while denouncing the wealthy and advocating a massive wealth redistribution for the destitute (King 2019).

The seminal work of Robert Karris (1976:219-233) places the radical message of Luke squarely at the door of the rich. According to Karris, it is to the rich who are concerned with the genuineness of their own Christian conversion and personal salvation. Luke's gospel is addressed to the problems their riches pose to their own community of faith and how best to use their possession in the light their newly found faith. If indeed Luke's gospel emerges out of the concerns of the rich, the question arises then of how a text intended for the rich can be used as a radical tool to champion the plight of the poor and marginalized. Moreover, Luke's social location, occupation, and station in life, betrays him as a pseudo-revolutionary masquerading as a champion for the poor. After all, the patron of Luke's writing project is one Theophilus, a mysteriously wealthy individual belonging to the equestrian rank (Kim 1998). Exemplified by tax-collectors generally, and Zacchaeus particularly, is the assertion that the elites often employ services of native collaborators who serve as proxy and "glorified slaves" in serving the interests of their slave masters.

One of the colonial and imperial strategies throughout the centuries has been the miseducation of natives through production of propagandist literature written from the point of view of the colonizers, often written by native collaborators whose life and work are financed by the colonizing powers. Notable scholars like Mosala (1989) see the Lukan text as irreversibly tainted by its concern for the rich to communicate a radical liberating message for the poor. Luke's Jesus is co-opted on the agenda of the hegemonic bourgeoisie class, diluting his radical message to fit the interests of the elite ruling class. This, according to Mosala (1989), is "an act of political war against the liberation struggle" of the poor, marginalized and exploited masses of the world. It leads him to the conclusion that "by turning the experiences of the poor into the moral virtues of the rich, Luke has effectively eliminated the poor from his Gospel".

The radicality of Jesus' message has already been softened by Luke's appeal to the benevolence and generosity of the rich towards the poor, whereas Jesus calls for a more radical response (Nessan 1995). Accordingly, Luke allows the presuppositions of his times to limit Jesus' radical message by interpreting it with the rich as his filter. The result is the urbanising of Jesus' radical message, disfiguring it to suit the interests of the rich in cosmopolitan centres (King 2019). Robbed of its Galilean geo-political, socio-economic, and religious setting, Jesus' message becomes "docetic" (Nessan 1995). Mosala (1989) views this as treasonous to Jesus' message.

According to Mosala (1989), the elite dominate Luke's Palestinian audience even though the axis of his message revolves round the material conditions of the poor, and the result is the betrayal of the poor's liberation struggle. There is no substantial pushback by Luke towards decisive economic reform, instead he only reinforces the *status quo* (Boer & Patterson 2017:177-178). Is Luke's gospel therefore not the proverbial "opium" seeking to lull and restrain the revolutionary spirit of the peasant masses in their struggle for liberation? Degenhardt (1965) mitigates this question by arguing that the "good news to the poor" corpus of Luke makes no sense if Luke's gospel remains the sole preserve of the rich (See also Gillman 1991).

King (2019) picks up this discussion by lauding Luke's literary genius in his ability to "code-switch" a message intended for the rich to champion the cause of the poor and marginalized. He then proceeds to warn his fellow liberationist scholars that notwithstanding the deficiencies in Luke's gospel, Luke "contains the clearest expression of God's good news for the poor found in the New Testament". King argues, there is no reason to abandon Luke's radical message since no other gospel comes closer to Luke in expressing the radical message of good news to the poor. Though mediated through the voices of the rich, and as imperfect as it is, King argues that Luke's message must be taken seriously in its focus on good news to the poor and marginalized, since Luke is "the best" we have.

This study agrees with King (2019), Mosala (1989) and indeed all liberationist scholars above who are correct to employ a hermeneutic of suspicion against Luke and are justified in their lack of trust in the authenticity of Luke's intentions. Specifically, the Lukan concern with the rich has informed the history of interpretation of the Lukan text

to the point of minimizing its good news for the poor. After all, Luke himself does not share the socio-economic status of the proletariat majority living in marginal Palestinian backyards as stated earlier. Moreover, King himself traces the longstanding tradition of middle-class bias in Lukan studies of economic issues, both archaic and recent. These incessantly attempt to undermine Luke's fundamental message of "good news to the poor" and "resistance to wealth".

Like the author whose name the third gospel bears, it is often privileged middle-class experts, s writing from the ivory-towers of oppressive hegemonic centres who parade themselves as paragons of Lukan economic ethics. These usurp the right to idealize these ethics, suppressing marginal and impoverished voices in the process, while acting as self-appointed prefects of the time, championing the cause of the very poor and marginalized whose voices they are oppressing. Medina (2005) highlights the hypocrisy of this bias by pointing out the intentional failure of the hegemonic historical-critical method of scholarship with its attendant claim to unpack "the world behind the text" to recognize the "dehumanizing effects of colonialism/imperialism". This renders Luke's text incapable of addressing modern imperial realities.

The poor are often used either as an experiment in studies reinforcing the dominant ideological outlook of imperial powers, with no definite interest in undoing poverty, oppression, and inequality. The consistent radical message of Luke's "good news to the poor" and "resistance to wealth", is often undermined by emphasis on the growing chorus of competing views, inconsistencies, and ambiguities in the text. Isolated micronarratives replicable nowhere else in the gospel are often used, whilst reading strategies that take seriously "the poor"³⁴ in Luke are deemed "popular', oversimplified, and insensitive to the multivocality of the Lukan text. The obsession exists with postulating a historical reader through redaction-critical readings and the building of symbolic consistency through figurative readings. This is often a strategy to water down the radical message of Luke, both in the contemporary scholarship and first-century Graeco-Roman Palestinian world. The initial focus of the redactional-critical approach

³⁴ See, for example, Cassidy (1978). Cassidy argues that Luke's ideological outlook and redactional activities is consistently favourable to those who were "literally poor".

was on who exactly, between the disciples and the people, must make complete renunciation and who is allowed to keep their wealthy pomp.

The Degenhardt (1965) monograph is hailed as a ground-breaking effort of providing a consistent reading of Lukan wealth-poverty ethics. It creates a dichotomous category foreign to Luke's wealth gospel by distinguishing between *μαθητής* (disciples), and *λαός* (people), creating a non-existent gulf between clergy and laity in the application of Luke's divestiture motif. Degenhardt's call that complete renunciation was only for church leaders in Luke's time is a caricature attempt to deny Luke's message of resistance to wealth. This half-measured approach to divestiture is equally a half-hearted commitment to addressing the plight of the poor.

Koenig (1985) likewise creates two different sets of disciples with two different lifestyles, economic ethics, and obligations. According to Koenig, complete divestiture is for itinerant disciples whilst residential disciples are allowed to keep their possession and lavish lifestyle. Their only obligation is to partner with the itinerants and support their ministry efforts. Little is said about the residential rich disciples' obligation towards the poor. In the same vein, Schottroff and Stegemann (1986) delineate between specialist disciples and non-specialist general followers of Jesus. Whilst they regard Luke as the only testimony to the radical, historical Jesus they reduce the term *πτωχοί* (poor) specifically to poor disciples by reason of Jesus' enlisting (Schottroff and Stegemann 1986:17). Detailed examination of the Lukan usage of the term "disciple" does not support the narrow description of the term "disciple" by the above social-science scholars, but only serves to buttress the "elite bias of nearly all of Luke's professional interpreters" (Coleman 2019:2-3; King 2019:9). Nessian (1995) views this as the genesis of the de-radicalisation of Luke's message of "good news to the poor" in service of the elites' interests in upholding the hegemonic structures of economic exploitation of the poor.

Schmithals (1973-4:163) understands Luke's wealth ethics within the context of persecution, where Christians are faced with options of either suffering financial penalties in the form of property confiscation; banishment from their homes and families, or the death penalty. For Schmithals, Christians should only allow for their property confiscation in the face of the imminent threat of apostasy. The general thread

in Luke, however, is the practice of generosity towards those who have lost their own possessions for the sake of Christ. Schmithals thus provides a consistent reading of Lukan wealth-poverty ethics, reconciling the tension between renunciation and almsgiving. However, his assumptions are based on extratextual experiences of a real or perceived threat of persecution based on philosophical and religious constructs with no internal evidence in the Lukan text itself. His categorization therefore falls flat in the face of the overwhelmingly great amount of Lukan material in support of the renunciation ethic aimed at ‘good news to the poor’.

The other strategy employed is to emaciate Luke’s radical message of “good news to the poor” by magnifying the inconsistencies in Luke’s wealth ethics. This is done by focusing on the chasm between wealth the abandonment ethic and charity, resulting in the relinquishment of the former completely, with the haphazard practice of the latter almost as to clear conscience. This lack of consistency perspective has been popularised by Luke Timothy Johnson who concludes that “[t]he problem we face is that although Luke consistently talks about possessions, he does not talk about possessions consistently” (Johnson 1977:130). Johnson’s conclusion that Luke’s message on possessions is contradictory is tonal for a burgeoning crop of scholarly approaches to Luke’s economic study. Johnson’s literary approach breaks away from the redactional-critical approach obsession with those who must surrender their possessions and those who must properly maintain them but instead it focuses on Luke’s renunciation ethic and almsgiving. He views the gulf between renunciation texts and almsgiving to be so wide and irreconcilable as to warrant a consistent Lukan wealth ethic. Calls for almsgiving are seen as generally applicable norms for Christian stewardship of riches. Nevertheless, Johnson argues that renunciation texts must be seen as a symbolic metaphorical call to engender limitless discipleship. Johnson argues that this limitless discipleship is for all disciples irrespective of economic status.

Coleman (2019:4) asks a relevant question as to whether the text of Luke itself supports the division of Luke’s teaching’s classification as literal and symbolic. King (2019) argues that Johnson’s classification is inadequate, since it is based on a small quantity of Lukan content and thus detracts from Luke’s economic message of radical agenda. Moreover, as King has demonstrated, many of Luke’s alleged radical inconsistencies may be simply addressed. Through mimicry, a literary subversive tool,

Luke subverts power and Empire images, juxtaposing the kingdom of God against the with the deadliness of the prevalent social order in his carefully crafted parables (King 2019). According to King's new analysis, 95% of Luke's economic content may be interpreted in the light of Luke's radical message. By reclassifying the most troubling verses in the 5% which favour rich elite's encounters with Jesus with no condemnation, King has anchored the radical message of Luke echoing throughout his gospel with a 95% best-case scenario.

Other critics rightly warn against underestimating the radical call of the Lukan Jesus' summons to renunciation. This is because the spiritual posture of divestiture ("limitless discipleship") that Johnson purports, is only achievable for those ready to make the real, material sacrifice (Coleman 2019). Whilst Coleman (2019) argues that this spiritualization of limitless divestiture by Johnson does not overlook Christian ethics. Johnson, according to King, avoids discussing Luke's radical wealth message's ethical consequences, choosing rather to focus on the symbolic values of the prophet and people.

Johnson wilfully avoids placing a demand on the rich, even on his criteria of literal almsgiving and is instead deliberate and unrelenting by paying attention to the representational significance of possessions. He diverts attention away from the gospel's ethical implications, focusing on prophetic and healing themes with no economic consequence and making sure that the marginalized are included. Yet this softening of the Lukan radical thrust of "good news to the poor" cannot escape the moral and ethical demands of the Lukan wealth ethic. As McReynolds (2016) acknowledges, Jesus' disability ministry, his miracles, interactions, and benevolence towards them is in fact the very essence of his gospel mission of concern for the poor.

Seccombe (1982) nevertheless rejects the idea of a Christian wealth ethic derived from the radical Lukan message with its renunciation ethic, as this call idealizes poverty and forces a demand and obligation not called for by Luke. There is a contradiction in Luke between the radical renunciation ethic and romanticization of wealth, but the inconsistencies in Luke are superficial. Only in extremely rare situations would a disciple have to make the costly decision of giving up possessions, making the claim whatsoever for a radical wealth ethic based on Luke's message baseless (Seccombe

1982). This author has therefore done away with the Lukan wealth ethic and eliminated the possibility of what he calls limitless discipleship, which is the rare occurrence of completely giving away possession if needs be. This, in turn has exonerated the rich from any responsibility towards the poor and pledged complete alliance with Mammon, the rival god Luke's Jesus warns about (see King 2019). Such anxiety about the call for renunciation is demonstrated in the claim that, even if the renunciation ethic was binding, it would only be relevant in Jesus times, making wealth okay to keep provided it used correctly (Seccombe 1982; King 2019).

However, as King (2019) observes in the parable of the Rich Man and Lazarus (Luke 16:19-31), Abraham makes an emphatic argument that those who are wealthy will experience reversal in the next life just because of their wealth. This is because the only way to stay wealthy is to not share with Lazarus, the wretched beggar at the gate. Jesus asks us to keep on giving (for the needy are always with us) until we have shared all with the poor and are no longer wealthy and are motivated by love for the impoverished, not asceticism (King 2019). Seccombe's strategy is to employ a "more subtle and thoughtful application" of Luke's economic themes, rejecting the "over readiness to make direct ethical applications" and demands from Luke (King 2019:17).

Seccombe opts to compartmentalize the poor, contrary to the insightful parallelism displayed by Alter (2011:122) in Luke's usage of Isaiah, who weaves together different text to broadcast the missionary thrust of Jesus in his "good news to the poor. Seccombe rather draws three different non-related nuances of the poor, to unconvincingly suggest that the use of *πτωχοί* as setting Jesus' program refers solely to "the nation Israel suffering and in great need". For Seccombe "the poor" are not religious people, nor are they a specific social category, nor are they people who have given up their possessions freely. Rather "the poor" is a term that is frequently used to describe Israel as an entire nation in desperate need of God's salvation.

The poetic function of the triad actions of Jesus in his mission statement, that is, release, restoring sight, and enacting Jubilee, serve as a restatement of the initial declaration, that is, 'good news to the poor', clarifying the meaning and scope of the first. Seccombe views Jesus' actions as three different perspectives on the same reality of Israel's exile. Granted, in Isaianic terms, Jesus explains his mission, referring to

God's long-awaited restoration of Israel. This mission, however, has been expanded in its scope to include people on the bottom rungs of the privilege ladder, accustomed to marginal existence, characterized by deplorable status and treatment (see Green 2014). Coleman (2019:48) demonstrates that this declaration of "glad tidings" is the "definitive, over-arching purpose that encompasses the others". Green (2014) rightly concludes that the gospel of Luke sums Jesus' mission as "good news to the poor", with themes of wealth and poverty intertwined with issues of belonging, power, and social privilege. His narrow definition of the phrase to Jesus' economic concerns in Luke is, however, problematic. The phrase "good news to the poor", serves as Jesus' job description (Luke 4:18) detailing the character of his mission (Luke 7:22) (Green 2014).

Seccombe is adamant that Luke is not concerned about the poor and alleviating their plight, instead Luke's radical message is about "Jewish nationalism, and not money" (Seccombe 1982:84-96). Seccombe's assumptions and assertions that Luke's Jesus seems to condemn riches, idealize poverty on the one hand and bestow favour upon the rich on the other hand, are unfounded. Whilst he does well to offer a consistent reading of wealth issues in Luke, his conclusions are insufficiently corroborated and at times forced. Seccombe refuses to let go of his Western privileged presuppositions, which undermines his best methods and intentions. Firstly, his Lukan notions of the "poor" unsuccessfully forced into Isaiah's categories are unfounded. His middle-class bias robs him from acknowledging the socio-economic dimension of Jesus' message of "good news to the poor". Where Luke does not support his thesis, Seccombe is prepared to completely disregard Luke's context. This includes universal scholarly consensus, as in his failure to see Luke 6:20 as a prologue introducing beatitudes, with Luke 6:30, 34 immediately following. These passages clarify the meaning of Luke 6:20 by speaking of limitless generosity with one's material goods and money which would inevitably lead to poverty. In the final analysis, Seccombe does not reflect the radical nature of Jesus' attitude on wealth and possessions but instead presents a watered-down version informed by his presuppositions and bias. When rich and poor are interpreted metaphorically, the critiquing potency of practices and structures that are oppressive is lost (King 2019:27).

Some, like Horn (1983), see Luke's message too as anti-wealth, that Luke must have sourced his material on wealth ethic from an earlier tradition of the Ebionites. He retains and uses this for the symbolic, metaphorical purposes of keeping a healthy distance from worldly possessions and not as moral imperatives. Horn's relegation of Luke's wealth ethic to the time of Jesus is a concerted effort to absolve contemporary scholarship and indeed Christendom of the practical responsibility towards genuine intervention to uplift material conditions of the poor. Schmidt (1987), on the other hand, perceives Luke as too haphazard in his handling of his inherited material to provide a consistent reading on issues of wealth and ethics. According to Schmidt, Luke's hostility to wealth can be traced to the Hebraic and Jewish traditions in antiquity which perceive wealth as a religious rival god. The only way to demonstrate trust and allegiance to the one true God is to free yourself from the dangers and snares of wealth by completely renouncing it as an act of self-regarding. This act of self-preservation, Schmidt argues, is completely independent and has no relevance to the socio-economic conditions and concerns for the poor.

Schmidt's conjecture is foreign both to the Hebraic Jewish tradition which emphasized care for the poor, needy, orphaned, and widowed, and to Luke's concern for the poor and disenfranchised. Luke's Jesus indeed juxtaposes Mammon as a rival god, and advocates for complete trust in Yahweh. Nonetheless, Luke's renunciation ethic embedded in his radical message consistently points out that complete divestiture is always aimed at service for the poor. Petracca (2003) follows the same thought as Horn by limiting the radical message of Luke to the first eyewitnesses of Jesus' mission. Klauck's (1989) comparison of poverty with celibacy suggests that poverty is either the lot, fate, or choice of the "the poor" in Luke, and therefore no decisive action can be done to change their situation. According to Jesus, celibacy results because of either design, choice, or forced circumstances. Klauck's untenable suggestion is that Luke does not force asceticism on all and that the poor masses in Luke are nomadic peasants avowed to poverty. In essence, Klauck blames the poor for their condition whilst absolving the wealthy of any responsibility towards the poor, let alone complete divestiture in service of the poor.

Yoder (1972) is responsible for popularizing the hypothesis that in Luke 4:16–30 Jesus was proclaiming a "Year of Jubilee" with social and economic as well as spiritual

consequences. Cassidy (1978) further claims that Jesus' radical teachings created a kind of peaceful resistance to Roman imperial powers, although his treatment is brief and superficial. Kraybill and Sweetland (1983) employ group dynamics to understand the Johnsonian inconsistency, locating it within the embryonic phase of the Lukan community in which sharing, and communalism are critical. For Moxnes (1988) the liberation of the poor in Luke is critical. Gillman (1991) is correct in asserting that Luke-Acts promotes the special status of the poor whilst underscoring the peril of wealth and promoting its distribution.

According to Yang (2013), Luke tones down his gospel to avoid confrontation with Rome, which might result in perceiving the church to be a menace to society and lead to its closure. The rich are redeemable if they repent, and they have a critical role to play in society to alleviate the burden of the most destitute (Yang 2013). Whilst Kim (1998) acknowledges that the radicality of Luke's wealth ethic with its focus on the wretched poor is uncharacteristic of the Graeco-Roman culture of patronage, he completely abandons the renunciation ethic in favour of almsgiving. Kim agrees that the extreme imbalance of wealth that leaves the poor exposed is condemned by Luke. He however gives the wealthy a leeway in his bi-vocational solution of itinerants who are to renounce wealth, and sedentary disciples who are to practice almsgiving and stewardship. Consequently, Luke's radical message of "good news" to the poor is watered-down.

For Philips (2001), Luke addresses the sin of greed and not the problem of wealth ownership. Consequently, how one feels about money is far more significant than how much money one has. According to Philips, it is okay to keep wealth for as long as it does not deter a person's devotion to God. Any suggestion that Luke advocates for wealth divestiture in favour of the poor is misguided. Lukan texts advocating for the renunciation of wealth must be read metaphorically. The result of Philips's reading is again a middle-class bias that fraternises with wealth. Philips's early metaphorical selection of the meaning of terms "rich" and "poor" results in him making light of the force of Luke's radical terminology in his gospel. Luke's message that wealth can and must be renounced in the service of the poor is made obsolete. Instead, generous acts of charity are encouraged, albeit not measured.

Nonetheless, Luke is unequivocal in his criticism of money and uncompromising in his radical message (Metzger³⁵ 2007). Avoiding the spiritualizing inclinations which pervert the radical message of Luke's wealth and poverty ethics by most interpreters, Pilgrim (1981) acknowledges that Luke calls for a radical response for the wealthy Christians, and that the "rich cannot be saved with their riches intact". Pilgrim agrees that the rich must give radically of their wealth in service of the poor. Whilst he believes that wealth must be resisted because of its corrupting power, Pilgrim does not believe that the renunciation ethic is binding on Christians. Rather, he calls for the right use of wealth for the equalization and liberation of the poor whilst spurning the idea that the rich can go about their business in the face of glaring poverty without advocating for the poor. Whilst Pilgrim strikes the right notes in terms of radical giving to the poor for economic equality and liberation, it is however not clear how the above can be advocated and achieved without the rich ultimately disposing their wealth in total service of the poor. One hurdle that Pilgrim cannot cross is the blatant command by Jesus in Luke 14:33 for all his disciples to renounce wealth. Pilgrim's suggestion that renunciation ethic is limited to Jesus' disciples is unfounded.

Esler (1987) unmasks the middle-class bias of scholars in the ivory towers of seminary and university academic enterprises. These seek to emaciate Luke's radical message of wealth, renunciation and good news to the poor, sacrificing it at the altar of private, individualistic and spiritual approaches to salvation, whilst serving the interests of the bourgeoisie class. Esler notes the concerted effort by wealthy professional interpreters to mute Luke's radical message of "good news to the poor". Esler argues that these professional interpreters fail to acknowledge the privileged position of the poor in Luke's interpretive matrix. This is contrary to the dominant Hellenistic society which treated them like dregs whilst he appropriates Luke's two-volume work as the "theology of the poor". According to Esler, the rich cannot "set themselves right with God by bringing their riches to a bottomless pit and throwing them in, while the starving poor looked helplessly on". Mere almsgiving cannot satisfy the radical demands of Luke's radical message of wealth renunciation in service of the poor, and the only appropriate response is complete divestiture for the benefit of the poor. Any interpretive lens that

³⁵ Metzger focuses on the following four parables in the Travel Narrative: the parable of the Rich Landowner (Luke 12:16-21), the Prodigal Son (Luke 15:11-32), the Unjust Steward (Luke 16:1-13) and the Rich Man and Lazarus (Luke 16:19-31).

seeks to water-down, derail, distract, ignore, or explain away Luke's radical message is suspect. Esler rightly warns about the obsession with almsgiving that seeks to rationalise, circumvent, and dismiss the revolutionary message of Luke in an attempt to save the rich individuals [or at least clear their conscience]. Instead, he insists on the systemic radicality of Luke's message not quenched by acts of charity. Luke demands justice and dignity for the poor.

Charity fosters dependency, thus Jesus lays out the principles of communal life based on solidarity and sharing with release from enslaving and impoverishing economic systems as the pillar of his message of good news to the poor (Pickett 2009:431). The salvific nature of "good news to the poor" is also in the main pluralistic and communal, as evidenced by the predominantly pluralistic use of the poor (*πτωχοί*) in Luke (Wi 2017).

Hays (2010) perceives the heterogeneity and multivocality of Luke as the diverse manifestations of the self-same renunciation ethic. Hays discards the interim and bi-vocational solutions of previous scholarships whilst advocating for a mixture of vocational and personalist applications that take in cognisance of one's location and station in life. According to Hays, whilst Luke is consistent in his renunciation ethic, the form in which it finds concrete expression is particular to an individual's situation. It may not always be a complete surrender of all assets to follow Jesus, but it is life-altering and life-changing, demanding a radical approach towards the poor beyond pre-existing notions of almsgiving (Hays 2010:180).

Luke thus presents Jesus as a radical social change agent whose mission is reordering society, putting those at the margins of society like the poor at the centre, whilst re-evaluating economic practices to upscale their social standing in life (see Johnson 1977; Pilgrim 1981; Bock 1992). There is no dichotomy between the preaching of good news (*itself directed at the poor*) and denouncing injustice, discrimination, and all forms of oppression in Luke's gospel, since Jesus' words and deeds were inextricably intertwined (see Newbigin 2002:181). Luke threatens the privilege of those enjoying social honour and prestige, making them to rather dismiss and disregard his message as purely symbolic and metaphorical (Miller 2014:417).

2.2.1. Luke's pro-poor stance

Nolland (1989:197) notes the “vexing question” of defining the poor in Luke. A plethora of views exist, ranging from spiritual and religious understanding of the poor and socio-economic and political understanding (See Donahue 1989:142-143). According to Scheffler (2011), when Luke wrote his gospel in Rome³⁶, he had the “poorest of the poor” in mind (in other words, the bottom 25% of [Friesen's] economic scale).³⁷ Thus, it was his purpose to mobilize all other economic strata of society (even those who just lived) to care for the dying or “begging” poor. The term either tops the list of the variegated suffering people (Luke 4:18; Luke 6:20; Luke 14:13,21) or is climatic of the Jesus story in Luke (as in Luke 7:1) (Albertz 1983:199).

The way Luke altered his sources reflects his economically pro-poor bias (Scheffler 2011). Exactly who the poor are is a subject of much scholarly debate and speculation. Barr (1969:218) warns against the prevalent temptation to spiritualize Luke's use of the term poor, robbing it of its economic connotation as evident in most biased³⁸ western readings. Moreover, grammatical considerations of the Lukan usage beg no other meaning besides the economic meaning of the poor, destitute (see Louw & Nida 1989:564), and what Rienecker (1970:137) refers to as the “begging poor” (*bettelarm*). Being rich, on the other hand, meant being powerful, safe, independent, and trapped in an exploitative relationship with the poor (Van Eck 2009:2). The tendency to view the term as an aggregate noun for all those who are marginalized resulting in diverse nuances³⁹ and perspectives of the term is unwarranted (Busse 1978).

The use of poor and rich in Luke's gospel is socio-economic in nature (Wi 2017:5). For Luke the poor are real people living in this world whose concrete material needs in this world must be met, and not a spiritualized concept crystallized somewhere in some

³⁶ A growing number of scholars believe Luke-Acts was written in Rome. See, for example, Schnelle (2007).

³⁷ The now outdated Friesen's scale (2004) distinguished between seven economic classes present in the economic structure of the Roman society (Imperial elites, Regional or provincial elites, Municipal elites, Moderate surplus resources, Stable near subsistence level (with hope of remaining above the minimal level), At subsistence level (and often below minimum level to sustain life), Below subsistence level).

³⁸ Above, the study has already dealt with the sin of middle-class biases in reading Luke's economic material exemplified for example by Schmithals (1980) and Seccombe (1982).

³⁹ The various nuances and perspective of the term poor were dealt with in Chapter 1. See footnote 24, pg. 29).

eschatological bliss (Scheffler 2011:129). The ten uses of *πτωχος* by Luke, seven of which are in plural, connotes that the poor are a socio-economic category of people on the fringes and bottom rung of society because of either their station or location in life (Wi 2017). It is their dearth of material possessions, under-nourishment, landlessness, and nakedness, all of which are socio-economic indicators that identify them as poor.

The Friesen poverty scale⁴⁰ is a heavily relied upon tool by most scholars as a manner of comprehending the economic structure of Roman society, with a consensus that Luke does not present a binary of extremely rich and extremely poor, but rather a multi-layered one (Scheffler 2004; Wi 2017; King 2019). As noted earlier, Scheffler (2011) argues that the “poorest of the poor” were in Luke’s mind, that is, the bottom 25% of the economic scale. It was his purpose to mobilize all other economic strata of society (even those who just lived) to care for the dying or “begging” poor. Land ownership and access to food and clothing are key indicators differentiating this bottom rung of an extremely poor group from the rest of the groups (Wi 2017). According to Wi (2017), the poor are the heavily indebted, malnourished, hunger-stricken, disease prone masses at the bottom of the scale whose lack of food is a socio-economic marker contrasting them with the well-fed rich. Another social indicator of these poorest of poor was clothing that was worn out and patched, referred to as rags, common among the public, except the bottom poor (Wi 2017).

King (2019) reverse-engineers the Friesen-Longenecker⁴¹ seven-tiered scale using the Scheidel-Friesen dataset⁴² to surmise that it is quite safe to include category 7 (about 25% of the population) in Luke’s definition of “the poor”. Regardless of who’s data are used or where Luke’s neighbourhood falls on the urban-rural continuum, and the people Luke refers to as “poor” make up most of the population: between 55-82%.

King observes that when the Scheidel-Friesen data is plugged into the Friesen-Longenecker economy scale, it indicates a society dominated by people who live on

⁴¹ Steve Friesen (2004) proposed a Graeco-Roman urbanism’ “poverty scale” as a framework against which to evaluate elements of the early urban Christian communities. In 2009, Longenecker (2009) updated the economic scale to reveal the missing middle.

⁴² This refers to new information shedding light on the degree of economic inequality and demand distribution in the Roman world. See Friesen and Scheidel (2009). Available at SSRN: <https://ssrn.com/abstract=1299313> or <http://dx.doi.org/10.2139/ssrn.1299313>.

or below the poverty line. Following Barr's (2002) suggestion, King (2019) employs a simple method of listing and counting to quantify Luke's economic material. According to King's accounting, the highest references of Lukan economic material on economic matters are directed to God's favour for the poor.⁴³ This is followed by stern warnings on wealth. Whilst much of the Lukan wealth-poverty scholarship has focused on the debate between renunciation and almsgiving, the Lukan material shows that concern for the poor is at the heart of Luke's economic message. Another significant factor is that the second largest material in the gospel's wealth corpus displays the heroes of Lukan stories showing favour to the poor.⁴⁴ Luke also displays solidarity with the poor and warns against money in a substantial portion of the book.⁴⁵

Luke employs various descriptions, titles and identity markers to socially locate people in his stories, exploiting this literary strategy to drive home his thematic expression (Arlandson 1994). This mixed Lukan strategy is where social underpins the literary, and literary assumes that social places social-class structure as an important factor in understanding the Lukan stories and the message they seek to convey.

The first-century cultural constructs of honour and shame have been identified as critical cultural markers in understanding life in the agrarian, stratified, and hierarchical world of the New Testament, through various sociological and anthropological methods. Accordingly, one's gender and social location in life accorded them a position of honour or shame in the eyes of the public. Malina and Neyrey (1991:26) observe that one's honour in the first century Mediterranean world was determined by one's power, gender, and social status. To lose honour, reputation, and respect on the other hand, was an act of shame (Malina & Neyrey 1991:26).

Häkkinen (2016:1) describes the first-century Mediterranean world as a limited good society with the majority of people living below the poverty line, whilst the few elites enjoyed the finest things in life (See Malina 1981; Rohrbaugh 1993). Political struggle,

⁴³ Based on King's (2019) new accounting, God's favour for the poor is attested in 74 passages, whereas 73 verses provide warnings against riches. Only 29 verses make even a passing reference to almsgiving, while 41 verses deal with wilful dispossession in some form.

⁴⁴ Following King's new accounting, the heroes of the gospel are described in 52 passages as showing favour to the poor.

⁴⁵ 73 verses in the largest category warn about prosperity, such as the thorns of wealth that strangle the Sower's word (see Luke 8:14).

social marginalization, and physical and mental suffering are all linked to Luke's concern for the poor (Scheffler 2011). Wi (2017) surmise that three concepts can be used to describe the socioeconomic reality of Roman Palestine, that is, *concentration of land ownership*, *growth in the number of tenants and day laborers*, and *peasantry's over indebtedness*. According to Wi (2017), the profiling of landowners demonstrates that socioeconomic privilege is inextricably linked to political and religious authority, with the rise of huge estates and landowners mirrored by the rise of the landless. The peasantry's over-indebtedness caused by the ever-growing inequality between the rich landowners and landless peasants resulted in a vicious economic cycle rooted in social, political, and religious factors, with the rich elites exploiting the poor in land tenure turning them into debt-slaves, tenants, or day labourers (Wi 2017).

Miller (2017) distinguishes between *conduct marginalized* (those like tax-collectors and prostitutes who are disdained by society due to their own behaviour), and *condition marginalized* (those disdained by society because of their condition or station) in life. Women generally and the poor specifically belonged to the latter category. Power dynamics therefore play a critical role and must be considered when interpreting the Lukan text (Du Plessis 2010).

Luke's opinions on poverty are set against the backdrop of ancient Roman economics (Scheffler 2011:117). Luke seeks to humanise the poor and disenfranchised whose dignity is violated by the active prevailing horrors of marginal existence in a hierarchical and stratified class-based society protected by the Roman imperial powers (Elliot 2008; Du Plessis 2010). Rome was obsessed with economic domination and expropriation of excess resources (Moxnes 1988:27). Du Plessis (2010) sums early Mediterranean societies as honour-shame driven and controlled, enshrined in the patron-client paradigm, with distinctions between the classes. Such included the valuable and worthless, rich, and poor, significant, and unimportant, where dignity was not inherent in every human being, with power struggles between the several Empire's that ruled the civilization as competing groups, always at odds with one another.

A patron-client patronage society, thriving on unequal power relations, exhibited one's economic and political privileges, with a patron having exclusive access to positions and resources that are vital for the survival of his client (Moxnes 1991:248). Luke

exposes these oppressive colonial structures and their dehumanising effect on the impoverished and disenfranchised in Roman Palestine (Vijayaraj 2004). Luke makes it apparent that poverty results because of dysfunctional human relations and societal systems (Knoetze 2019). It is the abhorrent socio-economic and political conditions of Roman Palestine that inform the Lukan care and concern for the oppressed poor, the disadvantaged, the social outcasts, and women; and his interest in restoring their human dignity, and rights.

2.2.2. Resistance to wealth

Luke employs the term “rich” to refer solely to people of material wealth (Coleman 2019). Hays (2010:186) argues that despite the multivalence of forms of discipleship with attendant varied responses and appropriations of the radical Lukan renunciation ethic, one thing certain is that wealth renunciation remains a non-negotiable for a follower of Jesus. Luke is unequivocal in his frequent reminder that for a follower of Jesus, the use of social and economic capital, that is, *possessions, power, and privilege* is critical (Miller 2014:416). Luke exhibits a clear call to employ social and economic resources in a revolutionary, contra distinct manner to the hegemonic culture (Miller 2014:426. All wealth surpluses must be used for the benefit of the poor and marginalized as demonstrated by the Lukan almsgiving and hospitality motifs (Coleman 2019:150-154). It is only in solidarity with the poor that the rich’s hope for salvation can be realized (De La Torre 2015).

Wi (2017:181) perceives the redemptive quality of wealth with its proper or improper use having eternal soteriological consequences. According to Wi, the rich’s invitation to the eschatological banquet is contingent on the fundamental transformation of their relationships with the poor (Wi 2017:208). Their eternal reward is based on their earthly divestiture in service of the poor (Wi 2017). King (2019:121) sees this as the only way a rich individual can pass through the eye of the needle (see Metzger 2007:121; Pilgrim 1981:133). Luke’s renunciation ethic goes beyond the normative standard of almsgiving, forcing the wealthy to radically alter their lifestyle *to the benefit of the poor* (Hays 2010:106).

There is thus a clarion call in Luke’s gospel for a wholesale abandonment of one’s past and pomp, divesting property and possessions, whilst advocating for a subsistent

consumption of goods (Metzger 2007:195). Metzger (2007:195); King (2019:27) see proponents of the almsgiving tradition as taming Luke's message to maintain "oppressive economic practices and systems". Thus, the romanticization of wealth in Luke is by far outweighed by the radical call to renounce it in the service of the poor (King 2019). King walks through Luke's micronarratives, unlocking Luke's radical message and exposing the middle-class bias in most of the scholarly interpretation of the Lukan wealth material whilst establishing Luke's unambiguous thrust for the emancipation of the poor.

According to King's new accounting, 42% of Luke's material accounts for wealth avoidance coupled with identification with the poor, with Jesus and his disciples setting a precedent to shun wealth. Luke prescribes the proper use of wealth, that is, just and compassionate divestiture to help the impoverished, as the wealthy's way of participating in the economy of God (Wi 2017:207). Wi highlights the two-pronged restorative and redemptive nature of wealth, that is, rescuing the poor from their dire straits in the here and now. This offers eschatological hope for the rich with prospects for reward in the future dawn of God's Empire with its attendant festivities (Wi 2017:207). Giving up one's possession for the benefit of the poor is always the right response to Jesus and his radical message (Coleman 2019:188). Wi (2017:208) concludes that the rich's salvation is contingent upon them divesting their wealth to help the less fortunate if they are to partake in the blessedness of God's economy. This is because socio-economic interests are embedded in Luke's salvific message (Wi 2017:208).

The strongest case concerning the toxic nature of wealth and its consequent abandonment by Jesus' followers is perhaps seen in the Parable of the Rich Fool and the Parable of the Rich Man and Lazarus (King 2019). The requirements of Jesus for the rich are best captured in the diametrically opposed responses of Jesus' encounters with the rich ruler (Luke 18:18-30) and Zacchaeus (Luke 19:8-10)⁴⁶ (King 2019). The rich are to share in pivotal resources like land, food, and clothing; breaking the vicious cycle of debt in the land tenure regime through debt-cancellation whilst sharing their resources with the poor to alleviate hunger and nakedness (Wi 2017:206). Miller (2014:423) concludes that Luke's Jesus commands an intentional minimalist attitude

⁴⁶ Chapter 3 will explore the Luke 19:1-10 micronarrative.

to wealth that shuns excess and directs volitional abasement for the benefit of others regardless of one's standing.

Luke's anti-wealth attitude overrides the biased middle-class distortion by contemporary interpreters who seek to trivialise Luke's radical implications by employing rhetorical gymnastics which bypass large anti-wealth material. Such attitudes drive a wedge between the almsgiving and renunciation ethic whilst confining renunciation to a specific time or people (King 2019). The only way to free oneself from the enslaving nature of wealth to the soul is to give it away for the benefit of the poor, thereby effecting God's justice (King 2019:122). This is the foundation of a just and equal society, an ideal society founded on God's economy (King 2019:122).

2.3. INFANCY NARRATIVE

2.3.1. Introduction

Key statements and moments exist in the introduction of Luke's gospel, offering a paradigmatic lens to Luke's message and programmatic agenda to Jesus' mission, giving meaning to the "good news to the poor". With economic connotations, Luke 1-3 provides the foundation for the remainder of the gospel, suggesting God's preferential treatment of the poor and marginalized (Coleman 2019; King 2019; Rodriguez 2012). Luke reveals his narrative and theological programme in these chapters by exhibiting faithful respondents drawn from lower-class peasant society in peripheral geographic locations to broadcast the gospel as good news to the poor and disenfranchised. Brown (1977:38) sees in the first two chapters, "theology so succinctly and imaginatively presented" unlike nowhere else in the gospels. Luke hammers through the motifs of peace and reversal to broadcast the story of justice, and liberation for the poor in these foundational texts, setting the tone of his gospel.

2.3.1.1. Lukan songs from the margins

The reason for Luke's focus is because the footprint of the repressive regime is present in the Palestinian colony from the onset of Luke's infancy narrative (Luke 1:5-2:52) through Herod the Great, its vassal client king. Like most colonial regimes, Herod is famous for curtailing fundamental human rights and civil liberties like freedom of speech and freedom of movement (Schürer *et.al.*1973:315). The *Magnificat* and

Benedictus are Theo-political hymnic responses to the civic realities during Herod's reign. Mary's song particularly is a revolutionary anthem against Roman colonialism, whilst economic exploitation of Palestine is inferred by Luke's mention of the census under Quirinius' governorship (Luke 2:1-3). This poll was intended to further extract wealth from the already heavily taxed local peasantry reeling under excessive Roman taxation. Thus, though he set his Jesus story squarely in Roman Palestine (Luke 2:4), Luke understood that Palestine was a colony of the Roman Empire (Luke 2:1) as evidenced by his explicit reference to Augustus and the Roman world (Scheffler 2011).

In Luke's gospel, the *Magnificat* is the first instance of economic polarity being addressed (Schmidt 1987:137). Through this hymn, Mary becomes a symbol of the impending social deliverance about to manifest in Israel as a whole. The saviour (Luke 1:47) and mighty one (Luke 1:49) of Mary is later explained in the *Magnificat* and Zechariah's song as the same God who reverses social order through deliverance of his people Israel. The infancy narrative is thus the first major section of Luke introducing the themes of the entire gospel, whilst previewing God's salvific purpose. Salvation in this instance is not just spiritual, personal, and private, but rather includes liberation from oppressive socio-economic and political structures (Mekhael 2018). The term salvation echoes the exodus motif and as used by Zechariah, includes physical understanding connoting the idea of deliverance of the oppressed from their oppressors, with the attendant root meaning of bringing help amid trouble. Thus, the term "salvation" as employed in the Lukan infancy narratives refers to both political deliverance (Luke 1:71) and sin forgiveness (Luke 1: 77) (Vijayaraj 2004:3).

The dichotomy between sacred and secular, private and public, personal sin, and public structures so prevalent in western understanding of salvation is foreign to Luke, since Luke's salvation is all-encompassing (Green 1997:25). The political and spiritual components of salvation are indissolubly linked in the Lukan view of salvation, as Marshall (1978:92) correctly remarks. This is because religion was never divorced from social, cultural, economic, or political life in ancient communities (Horsley 1993:152-154).

Luke's world is characterized by the elite's virtual control of resources and socio-political frameworks shaping life in imperial Rome (Pickett 2009:249). The Lukan

audience did not escape the political tyranny of Roman colonialism but suffered alongside the rest of the imperial subjects. Thus, it makes sense that full spiritual liberation necessitated a holistic deliverance from all oppressive forces, both spiritual and physical (Vijayaraj 2004). The politically helpless and poor are rescued from the margins into the centre through God's historic intervention in Jesus. God's salvation in the infancy narrative picks up low degraded outcasts from their dehumanised conditions, affording them dignified living in the here and now.

Moreover, the force of Mary's language in the *Magnificat*, with the use of the ingressive aorist verb, signal that the reversal of fortunes has already begun (See Medina 2005; Coleman 2019). Thus, the future invades the present in Jesus' person and ministry and marks the beginning of the eschaton (Wi 2017; York 1991:55). Its focus is on those marginal individuals on the fringes of society whom hegemonic powers deem outsiders by virtue of their condition, and those at the bottom rung of social mobility, deemed inferior by hierarchical standards of society (Kraybil & Sweetland 1983). The poor and oppressed in Israel are therefore portrayed as being liberated by God's salvation in Jesus (Mekhael 2018:8).

2.3.2. Peace motif

Through carefully written allusions to Isaiah, Luke weaves together the songs and exhortations in the birth narratives to present a motif of peace, cutting across gender, geopolitical, and socio-economic barriers. This peace comes at the backdrop of socio-political upheavals characterized by foreign occupancy, social-banditry, and revolutionary prophetism and messianic pretensions that bedevil the social world of the Lukan corpus (Ford 2010:3-10). The earthly peace is firstly heralded terrestrially by the miracle speech of the priestly Zachariah in the *Benedictus* (Luke 1:17) supported by the celestial angelic choir in the *Gloria Excelsis Deo* (Luke 2:14) before being sealed by the devout Simeon and prophetic Anna, giving it its scope and content.

The scope of this Lukan peace has both theological and geopolitical categories (Kayumba 2017). For example, Luke collapses two Isaianic motifs of "the suffering servant" and "Davidic king", both messianic, into Jesus as both the source and agent of this peace. From a vertical perspective, peace has to do with repentance, faith,

forgiveness of sins, and reconciliation with God. This vertical dimension of peace, however, finds expression horizontally in human relations, resulting in harmony with one another, justice socially and the vanquishing of political enemies, signalling peace in the land.

Through the literary genius of subversion, Luke juxtaposes the *Pax Romana* with Caesar Augustus as the agent, and the peace brought by Jesus as divine agent. Whereas the *Pax Romana* is maintained through military force, political oppression, and economic exploitation (Luke 2:1); the *Pax Christi* is characterized by piety, and liberation from all forms of exploitation (Luke 4:18-21). Moreover, the explicit morality of the sacerdotal couple (Luke 1:6) and the veracity of Zachariah's prophecy given its agency (Luke 1:67,79) seeks to contrast the moral life and double-tongued nature of the Jewish aristocracy. These are the corrupt native collaborators with Rome engaged in self-enrichment through economic exploitation of the peasant populace (Ford 2010).

The focus of the *Benedictus* is salvation (Luke 1:69) and peace for Israel, and salvation in this instance has socio-political overtones, meaning deliverance from enemies (Luke 1: 71, 74) occupying the promised land. The Jews did not see themselves as owners of the promised land of the patriarchs, since Rome claimed ownership of the land it owned (Bauckham 2008:338). King (2019) claimed that a premium was placed on wealth obtained through land ownership with special honours attached to land-based wealth production. Carter (2006:3-4) further perceived land as being the primary source of wealth for the elites. If this was true, then then salvation from Israel's enemies meant land restitution marking economic justice for the colonized people.

True to the paradigmatic and programmatic nature of the salvation motif in Exodus, Zachariah through the agency of the "Spirit" envisaged a day in which Israel would be delivered from her colonizing powers. This would result in spiritual freedom from the Roman pantheon (Luke 1:74-75), social freedom from state interference into their domestic affairs (Luke 2:1-3), political freedom from the brutal oppressive Roman regime. It meant restoring the patriarchal land (Luke 1:71-73) and bringing economic freedom from Roman exploitation through taxation (Luke 2:1-3).

The Lukan peace, therefore, is premised upon three scriptural motifs: the promise of land to the patriarchs, deliverance from foreign domination, and a new dispensation characterized by a just order under a Davidic king, free from enemies (Bauckham 2008:337). Politically, therefore, there can be no peace unless God saves his people from foreign domination with its socio-economic implications. Bauckham (2008:343) sees Luke depicting in Zachariah's song 1:78–79 “the Messiah lighting the way of escape for his people from darkness of captivity and into the way of peace.” For God's people to live in peace, their enemies must be dealt with (Kayumba 2017:31). Peace is possible as a result of salvation at two possible levels, that is, theologically through *forgiveness of sins*, and politically through *deliverance from enemies*.

Through Isaianic allusions, Luke envisions Jesus as the promised Messiah of Isaiah 9:6 with emphasis of his sonship and childhood in the birth narratives (Grassi 2004:7). The six-pronged Isaianic titles culminate in the climactic title “Prince of Peace”. Accordingly, Luke accords that title to Jesus and not Caesar. Unlike the oppressive Caesar, Luke presents Jesus as a Davidic shepherd-king, bringing peace to the conflict-ridden nation, often with shepherds and village settlers battling it out for mutually beneficial social co-existence. This peace brings harmonious socio-economic relations and genuine restoration between shepherds and village peasants resulting in the “resettlement of shepherds upon the land and the incorporation of their flocks into the rural economy” (Oakman 1991:171). It is to this low-ranking non-elite category in the marginal existence of society that the Christmas story is first sung. These representatives of Rome's impoverished and subjugated peoples receive the amazing news of the Saviour's birth (Coleman 2019:36).

The Lukan peace promises safety and enjoyment of possessions to those *othered* and disenfranchised by imperial Rome, based on their nativity, location, and station in life. Luke contrasts the motif of peace and salvation to bring about a state of theological, socio-economic, and political wellbeing to this marginal group of shepherds who have known no peace at the hands of the Romans. Luke might have adapted his notion of peace from Mark, and Q, adding to his special sources (Frankemölle 1992:220); but the Lukan *eirene* brought about by Jesus “is neither a puppet nor an ally of the Pax-Romana” (Swatley 1983:32). Though announced at the backdrop of imperial might

(Luke 2:1-2), this peace is geared towards the poor at the bottom rung of society and not the ruling elites.

2.3.3. Reversal motif

The reversal motif appears in 46 verses of Luke, resulting in a change of positions between the poor and rich (King 2019:46). York (1990:9-10) views reversal as a common subject in Luke's Gospel, both overtly and implicitly.⁴⁷ At the very outset of the Lukan narrative, there is an irrefutable challenge to the imperial order (Medina 2005). In the first instance, the annunciation of Jesus' birth (Luke 1:26-38) becomes a critical anti-imperial text, in that it depicts Jesus as the genuine "Lord" and his kingdom eternal, in contradistinction to Caesar and Rome. It perpetuates the Davidic dynasty tradition in Bethlehem, a concrete geo-political place, as opposed to Caesar's rule in Rome. Luke unashamedly ascribes titles such as Saviour and Lord, to thrust to the forefront of the political scene, intended for the Roman emperor in Luke's historical context, due contemplation of Jesus' sonship and political power as Messiah. This deliberate act of political subversion of Roman dominion becomes the frame of reference from which the rest of Jesus' life and mission should be understood.

Luke couples the divine agency of Jesus' birth with political nuances to present Jesus as a revolutionary Davidic leader. In the *Gloria Excelsis*, Luke employs subversive language in the angelic song to present Jesus and not Augustus as the "saviour" bearing "good news" bringing about "peace on earth". The Roman imperial cult understood the emperor to be the saviour of the world chosen by the gods to bring good news of peace to the whole earth. Against the backdrop of the traditional imperial announcement of the good news of the emperor's birth, the angels in the *Gloria Excelsis*, subvert this tradition, referring to the birth of Jesus as "good news of great joy for all the people" (Luke. 2:10b-II).

The birthday of Caesar Augustus was known to be the beginning of a new year, heralding "good news" across the world. However, Luke subverts this tradition by

⁴⁷ York's research splits the Lukan reversal passages into two categories: explicit reversal (Luke 1:53–55; 6:20–26; 16:19–31; 18:9–14) and implicit reversal (Lk 2:34; 3:4–6; 7:36–50; 10:25–37; 14:7–24; 15:11–32; 18:18–30; 18:18–30).

reimagining the birth of Jesus as the occasion of “good news” to all the world. This is the dawn of liberation and freedom from Rome’s colonial rule. Again, Luke manoeuvres politically to unreservedly assign titles historically reserved for Caesar to Jesus Christ, the saviour and Lord of the world.

Moreover, by selecting the shepherds, one of the lowest socioeconomic levels in society, as the recipients of the divine message, and not the powerful imperial elites; Luke reverses the order of honour and shame so prevalent in the first-century Roman world. These working-class shepherds at the fringes of first-century existence receive a divine memorandum, placing them at the centre of Luke’s liberation story (Bock 1992:506).

Luke has laid the foundation for social ordering as the crux of Jesus’ mission affecting human relations, class, gender, and economic status, and not just spiritual renewal. It is not only the vertical personal relations between mankind and God that Jesus’ mission seeks to correct, but it also affects horizontal human systems and institutions adding a sociological dimension to Jesus’ mission.

Societal change is at the heart of Jesus’ mission (Mekhael 2018). Mary becomes the first beneficiary of the radical message of good news to the poor as Luke challenges the imperial and misogynist worldview of first-century Roman Palestine that held women as marginal outcasts. Interestingly, unlike Matthew, who prioritizes Joseph in the birth narrative, Luke emphasizes the role of Mary in a culture that held women as generally inferior in the second temple Judaism. Whereas Matthew advocates the poor,⁴⁸ Luke views poverty as a social reality anchored in the socio-economic divide between the rich elites and poor peasants (Blount 1995:3).

⁴⁸ The reference here is to μακάριοι οἱ πτωχοὶ (Mt 5:3), but the Matthean form continues, “in Spirit, for theirs is the kingdom of heaven”. It is more likely that Matthew inserted “in Spirit” to his text than that Luke removed the phrase. According to Matthew’s account, Jesus’ blessings might be extended to those who were wealthy in material belongings if they were impoverished “in spirit” (Craddock 1990: 89; Schnackenburg 2002:47; see Thomaskutty 2014). Luke’s version however refers to the poor and hungry without qualification, with Luke also offering a sequence of “woes” addressed to the wealthy and affluent, which contrast with the poor and hungry’s benefits (Green 1997:267; Davids 1992:704-705; See Thomaskutty 2014). The cumulative consequence is that the benefits are directed to those who are truly destitute and hungry.

The good news to the poor evokes a Theo-political praise response in the *Magnificat*, celebrating the great reversal of colonial socio-economic and political realities. In her song from the margins, Mary prophetically foresees a reordering of the socio-political landscape resulting in the powerful roman colonizers and their local religious enablers brought low. She anticipates the lowly colonized peasants exalted, the hungry and poor masses satisfied with good things, whilst the corrupt rich are sent away empty-handed (Luke 1:51-53).

Medina (2005) is correct in his assertion that the *Magnificat* is a revolutionary liberation song aimed at broadcasting God's military intervention to bring about justice for the oppressed and conquered people. In this sense, Mary joins in the tradition of women celebrating the breaking of colonial yokes through divine agency and signifying God as the liberator of the oppressed and poor.⁴⁹ It is the mercy and justice of God that demands the saving of the poor from their unenviable plight and prompting God to act compassionately to rescue the powerless (Wi 2017:123).

Coleman (2019) does a sterling work of punctuating the radicality of Mary's song in the *Magnificat*. This sets the tone as the hermeneutical lens for the interpretation of Luke's gospel by juxtaposing Mary with the relatively high status of the sacerdotal couple Elizabeth and Zachariah. It spells out the *lineage, social-economic status, gender, physical location, response, and timing* in the narrative. Employing a literary technique to maintain a male-female pair in infancy stories, Luke highlights the role of the lowly despised women denied public life in first-century Roman Palestine (Tannehill 1996).

Women were in a lower position in both family life and public life in Jesus' day because Jewish society was essentially patriarchal⁵⁰ (Cassidy 1976:126). The forty-one times women are mentioned in Luke's gospel (the highest in the New Testament only at par with 1 Cor.) is intended to improve their standing in the face of a culture that devalues them (Miller 2017). Witherington (1984:10) argues for a low view of women before, during, and after Jesus' era in extra-biblical literature. Arlandson (1994), on the other

⁴⁹ See, for example, Miriam's song in Exodus 15:1-21, Deborah's song in Judges 5:1-13, and Hannah's song in 1 Samuel 2:1-10).

⁵⁰ Mekhael (2018) writing as a modern Mediterranean, asserts that today's Mediterranean society, particularly in the Middle East, still denies women public responsibilities.

hand, notes that Jewish women bore the brunt of gender and class distinctions and were at the bottom rung of society compared to their male counterparts in all social mobility indicators.

The concern that Jesus has for women in the gospel of Luke is striking considering the patriarchal realities of first century Roman Palestine (Prior 1995:50). According to Gutiérrez (1989:317-318), Jesus' collaboration with and general attitude toward women signified a fundamental break with this distortion among his people and with the dominating categories of his time. Coleman (2019) makes an excellent case for Mary's song as radical good news for the poor. In the *Magnificat*, God not only acts in the affairs of the world, but He acts on behalf of the impoverished and oppressed championing their justice whilst administering judgement to the powerful and proud. The military language of the *Magnificat* connotes a complete re-ordering of society. On the other hand, it speaks of the bleak colonial social realities in which the powerful oppress the weak, and the rich disdain the poor, a picture that needs changing by Jesus' mission. In this social reordering, the downtrodden and the underprivileged are prioritized by Jesus' mission.

The *Magnificat*, according to York (1990), implies a divine bi-polar reversal of society, where insiders according to social standards become outcasts, and those on the fringes of social values become insiders. This ushers in an eschatological society in which people are valued for who they are rather than what they possess (Mekhael 2018). Barclay (2001) and Tamez (2006) warn against the excessive spiritualization of Mary's *Magnificat*, and advise that it should rather be taken for its true economic reversal message, which is consistent with the rest of Luke and Judaeo-Christian voices.

In Luke 1:46-55, the beneficiaries of injustice and oppression are deposed from their undeserved thrones, whilst the impoverished victims of injustice are lifted (Reid 2009:40). This is a vision for a new world order envisioning not just a reversal of roles but "God's justice as creating a circle in which all have an equal place at the table; all are in right relation, each one knowing their integrity and preciousness in God's eyes, each one free to love fully" (Reid 2009:40). According to Reid, the empowerment of individuals who were previously oppressed, as well as the relinquishment of power,

privilege, and status by those who currently have them are two parallel movements. Both are necessary to realize Mary's moral vision enshrined in the *Magnificat* (Reid 2009:40). The language of the *Magnificat* is loaded with military overtones of power and judgement, capturing socio-political and theological dimensions of peace (Kayumba 2017:14). Luke mimics the military force that brings about the *Pax Romana* to illustrate the force with which God acts to bring about justice in human relations and institutions. The picture of God overthrowing tyrants and causing social upheaval by a show of force should not be difficult to reconcile, since it is in the nature of the oppressors to maintain the oppressive systems and institutions that benefit them.⁵¹

The *Magnificat* is a typical example of a concealed transcript, or a seemingly politically unobtrusive written story expressing resistance to the Roman government's intellectual, political, and ethical norms (Coles 2020). Green (1995:94) is right to suggest that a closer reading of Luke breeds an understanding that "Salvation is pre-eminently, status reversal". It is the middle-class interpretations of the affluent which have often distorted the "just concerns of the innocent biblical sufferers into concern for the salvation of sinners" (Sobrinho 2008:26). Coles (2020:58) rightfully perceives a motif of dissent in Luke's status reversal narratives, aimed at the "promotion of an ideal of ontological, existential, and ethical justice for the marginal".

The *Magnificat* has been the "favo[u]rite rallying cry of revolutionary and dissident groups throughout history" envisioning a "complete reversal of human values" (Miller 2014:89). The Lukan songs are therefore not powerless and non-offensive "sweet lullabies" often portrayed in paintings with some tame Mary but are rather revolutionary clarion calls radical enough to warrant banishment and silencing⁵² (Reid 2009). Miller discerns the "primacy effect" in the placement of the *Magnificat* in Luke's narrative. This indicates that "divine actions of reversal are made manifest not only in the cross and resurrection, but also in Jesus' concrete ministry of social justice and community engagement" (Miller 2014:121).

⁵¹ Most commentators struggle to reconcile the military language of violence and force embedded in the *Magnificat* (see Morris 1988; Coles 2020). Kayumba (2017) wrestles with the notion and concludes that "it is hardly fair to completely rule out the idea of 'military' force or battle in Luke's concept of peace as it was also perceived in the *Pax Romana*".

⁵² Reid (2009) states that the Guatemalan government banned the public recitation of the *Magnificat* in the 1980s because of its revolutionary potential.

Mary's authorship of the *Magnificat* is taken seriously by Spencer (2014:38-43), who notes that its sentiments seem to form the basis for Jesus' own radical ministry, and that she serves as an inspiration for the oppressed class in society. Mary is regarded as an unusual leader chosen by God, a source of encouragement for those who live on the margins of society.

2.4. BAPTIST ETHICS

The teaching of John the Baptist in Luke 3:10-14 is a uniquely Lukan account, crystallizing repentance through socio-economic acts of mercy and justice in line with Luke's salvific message (Wi 2017:124). In the Lukan narrative, John's message plays an *archetypal* function (Green 1999). For example, Luke redacts his sources to present John as the embodiment of the socio-ethic of his message, voluntarily choosing a low-profiled ascetic lifestyle and thus setting the stage for the towering socio-ethic and ministry of Jesus (Scheffler 1990). True to Lukan paradigmatic and programmatic hermeneutical lens,⁵³ the genesis of John's ministry is carved within the historical-political setting of oppressive Rome with its client native collaborators.⁵⁴ Luke positions the ministry of John within the geo-political powers of his day (Wi 2017:127). By classifying the crowds who come to John's baptism according to their economic standing⁵⁵, Luke connects the historical-political situation with the socio-economic framework of his time (Green 1999:124-125; Wi 2017:128). The Baptist's message of "good news to the poor" is carved in economic terms (King 2019:58). Luke thus alters

⁵³ Luke follows a similar path in his first three chapters (Seo 2015:23-30). Coleman (2019) contends that the early ministry of John the Baptist and Jesus is defined by good news for the poor, leading to meaningful deeds in the last panel (Luke 3:1-4:44), and both individuals are challenged by the wealthy and powerful. According to Coleman, Luke demonstrates that "the motif of riches and possessions is intricately tied to the subject of reversal (the nature of God's redemptive activity)" and "the theme of appropriate response (the nature of discipleship)" across three "panels" of the introduction (Luke 1-3). Thus, Luke establishes the twin themes of reversal and appropriate response right at the start of the gospel.

⁵⁴ John the Baptist began his ministry during the reigns of Caesar Tiberius (14-37 CE), Pontius Pilate, governor of Judaea (26-36 CE), Herod Antipas, tetrarch of Galilee (4 BCE–39 CE), Philip, tetrarch of Ituraea and Trachonitis (4 BCE–34 CE), and the high priestships of Annas (6–15 CE) and Caiaphas (18–37 CE). See, *inter alia*, Luke 3:2.

⁵⁵ Wi takes cue from Fitzmyer (1985:470) and Marshall (1978:143), suggesting that they are most certainly Jewish, as residents in Roman Palestine are generally involved in collecting indirect taxes, whilst referring to Josephus' (*Ant.* 12.169–178) mention of the Jews' participation in tax farming. Soldiers from Herod's army are thought to have frequently aided tax collectors in their efforts to collect taxes (Fitzmyer 1985:470; Marshall 1978:143), whilst Josephus (*Ant.* 12.180) says that Joseph took two-thousand-foot soldiers for assistance in tax collecting. Schürer (1973:372, 374) says that as the tetrarch of Galilee throughout John's ministry, Herod Antipas controlled the collecting of taxes and tolls.

John's preaching, giving primacy to socio-economic interests whilst relegating judgement to the background of his message (Scheffler 1990:21). Consequently, elimination of greedy exploitation resulting in acts of mercy and mutual sharing crystallizes the salvation of the poor in ordinary day to day life (Scheffler 1990: 32).

Phillips (2001:2) fails to discern Luke's undercurrent when he only perceives an ethic of generosity and a warning against greed whilst seeing neither hope for the emancipation of the poor nor rebuke for the oppressive Roman systems. By disregarding the political-historical setting and economic framework within which John's scathing rebuke takes place, Phillips misses out, if not ignores, the radicality of John's socio-economic message of good news to the poor. This calls for the distribution of clothing and food to the needy (Luke 3:11), the fair collection of taxes (Luke 3:13) and restraint from extorting the people by soldiers (Luke 3:14). John's radical call is one for institutional reform, and a challenge to the exploitative systems of his day. Josephus (*Ant.* 18.117–118), who is usually a harsh critic of prophet-like figures⁵⁶, portrays John in a positive light when ascribing his message to the practice of virtue and justice with eager adherents ready to practice his advice.

It is John's influence on Antipas's critical props of his financial and military power threatening his political and economic rule that lays the foundation of his martyrdom as a prophet of justice (Meier 1992:237). Luke not only introduces the historical-political context for John's message through the inclusion of geo-political and local retainers in soldiers and tax-collectors. With it, he brings a reflection of their power abuse and economic exploitation (Wi 2017:130). The gospel of Luke begins with a passionate defense of God's preference for the impoverished (King 2019:74). Luke thus paints the hierarchic cycle of Roman economic exploitation and patronage network. This begins with the ruling Caesar, through the imperial governors and to the local elite collaborators and retainers to which John calls for decisive action to radically improve the material conditions of the ordinary people as a mark of repentance. Coleman (2019:73-95) moreover perceives in John's ministry a message of "good news to the poor", demanding reversal of their fortunes, and radical giving on the part of the rich

⁵⁶ See, for example, his reference to Theudas (*Ant.* 20.97-99), an Egyptian Jew (*Ant.* 20.167-170; *J.W.* 2.259–263), and an imposter (Josephus, *Ant.* 20.188).

as the only right response to that message. The only appropriate reaction, according to Luke, is a shift in behaviour that addresses “specific social, moral, ethical, financial, and religious inequalities” (Pickett 2009:428).

2.5. NAZARETH MANIFESTO⁵⁷

The Nazareth manifesto is a summary of Jesus’ mission statement, setting an agenda for Jesus and his followers (Uwaegbute 2013:143; see also Onwu 2002:276). It comes against the backdrop of gross poverty, rampant inequality, indentured servitude, disease and malnourishment, slavery and heavy taxation and exploitation characteristic of Palestine under Roman colonization (Mgbemena & Obielosi 2019:4). Jesus utters this remarkable statement as an eyewitness to the Herodian dictatorship, the hoodlumism of the diseased Nazareth slum-dwellers, and social injustices resulting in the banditry of fellow Galilean dwellers, forced by the environmental hostilities to mount a counter guerrilla warfare against the Roman might (Okpalike 2014:91).

Jesus’ programmatic mission statement in Luke. 4:16-32, especially Luke 4:18-21 is a single most ardent exemplar of anti-imperial rhetorical text in the New Testament (Medina 2005:156-157). The programmatic nature of the Nazareth manifesto is unanimously recognized in Luke’s gospel, focusing on status reversal images while delivering a clear message concerning the identity of Jesus of Nazareth and the mission he is about to undertake (Miller 2014:133). For example, the Nazareth incident (Luke 4:14–30) is referred to by Garland (2011:189) as a “frontispiece” to Jesus’ public ministry. Bock (1994:331) further sees in the Nazareth manifesto both an overview of Jesus’ work and a representation of his teaching.

The Nazareth manifesto builds on Mary’s *Magnificat* as the foundational text laying seeds for the reversal motif. It credits God with authoring the reversals, changing Rome’s Empire into God’s Empire while developing the reversal motif and highlighting the “Roman imperial hierarchy’s human and arbitrary nature” (Bock 1994:331). The Lukan social justice concern in the salvation motif is embedded in the Isaianic text (particularly Isaiah 44-66). It is echoed in the annunciation, *Magnificat*, *Benedictus* and

⁵⁷ Sugirtharajah (2003:2) notes that this appellation has been in vogue since the fall of the Soviet Union.

Simeon's *Nunc dimittis* with Jesus in the Nazareth Manifesto fulfilling justice and righteousness as a prophetic figure of Isaiah 61 (Afulike 2018:44).

The Nazareth manifesto is a critical part of the economic agenda of Jesus written by Luke, which is first alluded to in the *Magnificat* (Green 1997:264-265). In this first meeting, Jesus announces to his listeners that his entire ministry career will be devoted to economic redress and release from economic injustice (Pickett 2009:429). The content of the manifesto demonstrates Jesus' manifest concern for the impoverished, marginalized, and disenfranchised of society (Mgbemena & Obielosi 2019:2).

Though natural and human factors conspired to create a state of poverty, this in first-century Palestine, was largely the result of the prevalent Graeco-Roman unequal socio-economic structure (Prior 1995:173; See Mgbemena & Obielosi 2019:7). This identification of God in Lukan theology poses a danger to the Greco-Roman world's social, economic, and ethical principles (Rowe 2009:142-143). The Nazareth Manifesto is an economic statement that lays out in detail the fundamental concepts of equality and justice, which are based on Jesus' vision of a changed system of social relations that is rooted in God's identity (Green 1997:203; Also in Miller 2014:134).

As a prophet, Jesus confronts the fundamental structures of economic oppression, whilst as a teacher he envisions an alternative worldview facilitating God's economy (Pickett 2009:429). Jesus announces himself as a prophetic messianic figure with a mission to create a just and equitable society and henceforth challenges the rich to fulfil the obligations stipulated in the mosaic legal tradition of justice beyond mere almsgiving (Mgbemena and Obielosi 2019:7-8). The significance of this Nazareth episode lies in its primacy effect as the first recorded preaching encounter in Jesus' ministry (Abogunrin 2003). Matthew and Mark placed the Nazareth rejection with its attendant message at the end of Jesus' first ministry year. Luke however, intentionally placed the episode at the beginning to outline Jesus' programme of action (Abogunrin 2003). This is a significant Lukan narrative device changing the plot to highlight the pivotal role of the Nazareth episode (Prior 1995:87-88).

Metzger (2007:25-31) also establishes the Nazareth manifesto programmatic foundation in his attempt to correct the consumerism of the western church through

using the parables of Jesus in the travel narratives.⁵⁸ According to Schürmann (1969:221), Luke 4 prepares the reading eye for the rest of the Lukan corpus, whilst Luke 4:16-30 is Jesus' own witness to his programme, consistent with his revelation in the infancy narrative. This prophecy in the stage-setting Nazareth pericope guides the reader's comprehension of the forthcoming narrative (Johnson 1991:81). The Nazareth pericope envisions the entire ministry of Jesus in the gospel, and not just the Galilean encounter⁵⁹ (Coleman 2019:10). This Nazareth manifesto grounds the life, ministry, and preaching of Jesus in the ethic of God's preferential option for the poor and marginalized (López 2012:8-9). The Nazareth manifesto is an example of Luke's status reversal motif, with those in the bottom rung of society benefiting from God's salvific economy instead of the well-to-do elites (Coles 2020:3). Miller (2014:133) views it as a "traditional non-elite hidden transcript" finding practical expression in interpersonal relations, whilst defining status reversal and its intended recipients.

Jesus' mission statement in Luke gospels culminates in the axiomatic expression "good news to the poor" (Wi 2017:100). As a result, the preaching of good news to the poor is the content demonstrating Jesus' messianic identity as revealed in his mission (Wi 2017:100). Preaching good news to the poor was at the top of the list of his Spirit-anointed actions in the Nazareth sermon, and it served as the interpretative category for the rest (Coleman 2019:65). Jesus makes the quotation from Isaiah directly applicable to himself, and he does this in such a way that it evokes a dramatic reaction in the people in the synagogue (Scheffler 2011). Luke's version of the Isaianic text suspends judgment once more to emphasize the freedom of the oppressed (Green 1999 209-210). By including the chapter on the release of the oppressed, Luke, on the other hand, underlines the Old Testament jubilee tradition. This pushes for the return of tribal land for bonded labourers owing to indebtedness and socio-economic concern for the marginalized (Ringe 1985:28-30). In contrast to popular culture, the Lukan Jesus promotes an alternative vision of life and action for his listeners that embodies divine generosity without expectations, freeing people from the patronage system's traditions, including competing for honour (Pickett 2009:432).

⁵⁸ The parables of Jesus specifically, and the travel narrative generally, will be dealt with in the next chapter.

⁵⁹ According to (Coleman 2019:11) the message and ministry activities in Luke 4:14–44 portray the nature of the Son of God anointed by the Spirit setting the tone of the rest of the Lukan narrative.

Some have argued against the feasibility and historicity of the jubilee tradition. Nevertheless, Crossan (1998-195-197) warns that its power lies in its canonical inclusion as a noble agenda to defend and administer justice for the powerless non-elite, given the incessant insatiable power-mongering of the elites. In line with the LXX rendering of the Isaianic texts fused by Luke, the Nazareth manifesto represents Jesus' royal reign characterized by justice for the poor and concern for the orphans and widows, the socially powerless and marginalized dregs of society (Wi 2017:105).

Luke subversively adapts the Isaianic texts on redemptive hope for the powerless exploited masses and judgement on the rich's hypocrisy, injustice, and sin. He gives hope to the marginalized peasant poor under Roman rule, with Jesus as their spirit-commissioned prophetic liberator (Blenkinsopp 2003). Luke places the political restoration of Israel as a fundamental aspect of Jesus' missional agenda, embedded in Isaiah's messianic expectation (Is 58:6; 61:1-2) (Medina 2005:157).

The triple repetition of "the scroll" by Luke emphasizes divine intentionality and purposeful choosing of the entire Isaianic text by Jesus (Coleman 2019:46). The Nazareth proclamation, according to Trocmé (1973:234), is a dissident anti-colonial manifesto of a non-violent revolutionary leader set on releasing the colonized captives, ministering to the destitute, improving the health conditions of the ordinary people, and instituting Jubilee (Medina 2005). It is a statement of a self-effacing man, made tangible by genuine concern for the wellbeing of his compatriots with no sense of personal gain. Jesus forfeited what little comfort he had in his parental home to fulfil a divine calling of liberating the poor, oppressed, and disenfranchised of Palestinian society (Okpalike 2014; see also Mgbemena & Obielosi 2019). The key to understanding Luke's texts on riches and poverty, possessions, and abandonment of goods is to summarize Jesus' ministry as "good news to the poor" (Miller 2014:60)

2.6. BEATITUDES

The essential theological component in terms of Jesus programme, apart from Nazareth's programmatic agenda (Luke 4:16-21) is Luke's Sermon on the Plain (Medina 2005:141). Accordingly, Luke canonized his hermeneutics, ethics, and theology in the sermon on the mount (Medina 2005:141-142). These teachings of

Jesus are part of the narrative arc, laying the groundwork for a new social vision based on the Divine generosity conveyed and exemplified by Jesus and other characters in the gospel (Pickett 2009:430). The sermon prioritizing the poor marks Jesus' commitment to doing away with class distinctions and fostering equality in society (Ndekha 2020:7). The Sermon on the Plain as a good pledge to the poor and hungry, whilst the generosity of the audience is enlisted to address beggary and indebtedness (Luke 6:20-21), marking the beginning of Jesus' teaching of good news to the poor (King 2019:65).

It is noteworthy that "the beatitudes begin by the blessing of the poor and hungry" Miller (2017:155), marking the primacy of the poor in Jesus' teaching agenda. The overarching interpretive criteria for the ensuing pairings are provided by the opening beatitude and woe pair ("happy are you poor" (Luke 6:20; "woe to you affluent", Luke 6:24; Coleman 2019:62). The link between the rich and the poor is highlighted by Sermon's *makarisms* (Ndekha 2020:1).⁶⁰ The beatitudes stand as a key text atop the sermon on the mount, deliberately echoing the reversal motifs of both the *Magnificat* and the Nazareth Manifesto (Coleman 2019:60). The Sermon bears strong resemblance to Greek panegyrics in its general format of *makarisms* and laments (Luke 6:20–26), followed by exhortation (Ndekha 2020:2).

Because Jesus delivers advice in Luke 6:27–49, Kennedy (1984:45) characterized it as deliberative. The panegyric was a formal public speech, generally in verse, given in celebration of a person or phenomenon, to impose commonly held values. It formed part of a ruler's eulogy combining praise and censure, as well as exhortation, as a distinctive feature of Greco-Roman panegyrics (Kennedy 1984:45). Ndekha (2020:4) perceives a panegyric-like relationship in the literary structure and content of the Sermon.

According to Nightingale (1995:97), its association with panegyrics is confirmed by the fusing of the two rhetorical genres (blessings and woes). The setting of the *makarisms*, according to Bovon (2002:222), was the home, with its pleasant events, and the school, where the industrious student's satisfaction was commended. *Makarisms* were

⁶⁰ The technical interpretation of the Greek plural word Μακαρισμοί (blessings) is *makarisms*.

originally a type of congratulation or appreciation for exemplary behaviour (Hornblower & Spawforth 1996:914). According to Fitzmyer (1981:632), they glorified or exalted a person's good fortune. They also voiced the acclaim of individuals who followed God's ways in cultic circumstances (Bovon 2002:221). Sheard (1996:770) suggests that praise reinforced public moral norms, making praising equivalent to requesting a path of behaviour.

The woes, on the other hand, reveal the accusing and shameful tone that every Greco-Roman male tried to avoid (Liddell *et al.* 2020). According to Ndekha (2020:1), praise and blame were valuable weapons of social control for the Greco-Roman audience. The Greco-Roman normative world of honour and shame is the context for the above *makarisms* and woe (Ndekha 2020:1). The Greco-Roman competitive mentality, in which individuals were eager to win and be labelled the best, found expression in the general cultural search for honour (Ndekha 2020:2). According to Hanson (1996:81-111), the matrix of *makarisms* and woes is a world-field and value system of honour and shame. The Greco-Roman competitive spirit, in which individuals were pushed to win and be termed [the best], found expression in the general cultural striving for honour (Pomeroy *et al.* 1999:60). Public recognition of one's skills or achievements was the core motivation for honour competition (Pomeroy *et al.* 1999:60).

The patronage concept of reciprocity and authority that ruled interpersonal connections in Greco-Roman society is disrupted by Jesus' practical strategy for alleviating poverty (Pickett 2009:429). The teaching of Jesus envisions life free of patronage, which is later reflected by the following episodes in the Lukan narrative (Pickett 2009). Luke's Jesus promotes limitless giving (Luke 6:30) whilst prohibiting interest-bearing loans (Luke 6:34-35) (King 2019:142). On the other hand, lending money without expecting a return is a good way to spend it (Luke 6:35; King 2019:142).

Luke's Jesus then simultaneously invokes and subverts the basic pattern of reciprocity in Greco-Roman culture which held people dependent. Jesus taught his followers to be generous and do good without expecting, thus turning upside-down the "totalizing cultural system that encompassed every dimension of life" (Pickett 2009:429). The paradigm was inextricably linked to Greco-Roman culture's competitive drive, and it was used to exchange honour and disgrace (Kurke 1991:93). The practice of giving,

receiving, and repaying made sense in the context of a challenge and riposte, in which the recipient of a gift or challenge was obligated to return something equal to or better than the first gift or challenge (Kurke 1991:82).

Luke has once again redacted his sources, that is, Matthew and Q,⁶¹ to relate a counter-cultural message of Jesus, subverting panegyric Greco-Roman overtones to foster an egalitarian community where there is neither destitution nor extravagance (Ndekha 2020:7). Luke characterizes the poor and rich by their concrete material conditions: the rich are those with full stomachs, merriment, and public praise, whilst the poor are those with concrete conditions of hunger, vilification, exclusion, and defamation (Coleman 2019:61). Unlike Matthew, Luke's version of the beatitude is personal, immediate, and direct, with no spiritualization of the poor's plight (Coleman 2019:61; King 2019:83). Jesus was poor and he came to proclaim the gospel to the poor, in economic terms, who are poor by any standards and not just to the poor in spirit who are aware of their need of God (Padilla 1975:96). Thus, socio-economic categories⁶² resulting in shame and exclusion are the right inference of Luke's dichotomy of poor and rich in the beatitudes (Cassidy 1978: 22-23).

Luke's "poor" and "rich" categories are diametrically opposed (Krüger 2005:169-201). Luke blesses the literal poor whilst adding a curse against the rich (Luke 6:20b-26), he blesses the physical hungry whilst warning the now full of reversals of their fortunes in the future (Alley 2001:60). Because they have not shared their present blessing with the poor, Luke offers a stern rebuke to the rich (Alley 2001:60). Seccombe (1982:164; see Phillips 2001:165; *contra* Kim 1998: 204-205; Gillman 1991:54-55; De La Torre 2015; Coleman 2019:112) makes a forced reading of a metaphorical and soteriological nature whilst denying any suggestions of economic import and reversal overtones. Kim views the pairing of Jesus' blessings and woes as both a prophetic fact and a thematic paradigm, finding expression in subsequent episodes.

⁶¹ For a recent treatment of Luke and the Matthean version of the beatitudes, see Coleman (2017:48-67).

⁶² Others, like Seccombe (1982) and Marshall (1989:120-123) see soteriological nuances in the term. The multivalent reading approaches in reading Luke, that is, metaphorical, spiritual, and literal, have already been dealt with.

The Lukan version of the beatitudes of God blessing the poor and chastising the wealthy find resonance with Dio Chrysostom's *De Divitiis*,⁶³ whilst Clement⁶⁴ favours Matthew's spiritualized version (King 2019:198-209). The term "the poor" is always personalized by Luke (King 2019:177), emphasizing the shame and social estrangement that it causes (Ellul 1984:142-147). Marginalization in this sense has both sociological and economic overtones of material poverty, implying limited resources, sub-human existence, political oppression, and economic deprivation by the hegemonic power (López 2012:28). The term "rich", on the other hand, has a single meaning, always referring to people who have financial wherewithal (together with the social standing, privilege, and power that comes with it; Coleman 2015:65). This group is the target of Jesus' harshest criticism and command (Krüger 2005:177-178).

2.7. CONCLUSION

This chapter has analysed Luke's material on wealth, poverty, the rich, the poor, and money to focus on Luke's radical economic message. Foundational texts that are both paradigmatic and programmatic for the Lukan narrative were the focus of this analysis. Luke's special interest in political and socio-economic matters and their influence on his narrative was underscored. The chapter took a cursory look at the various interpretive lenses to Luke's narrative message and Luke's solidarity with the poor. Luke's criticism of the Roman Empire was underscored in the infancy narratives, focusing on the Lukan songs from the margin, the inaugural sermon, the Nazareth Manifesto, and lastly the beatitudes as the foundational teaching of the alternative vision of life in God's Empire contra the Empire of Rome.

We now turn to our focal text, Luke 19:1-10, its place within the Lukan travel narrative, evaluating the history of interpretation of Luke 19:1-10, whilst highlighting Zacchaeus' radical response in the context of the overall Lukan economic message. The Chapter will argue that Zacchaeus is the model for the rich's right response to Luke's message of Luke's radical message with its twin-pillars which favour the poor and loathe riches.

⁶³ The *De Divitiis* categorically states that God condemns the rich generally with no distinction between the "good rich" and the "evil rich" whilst it eulogises the poor as blessed (*De Divitiis* 205).

⁶⁴ Clement creates his own version of the beatitudes through redaction of the synoptic versions. His pastoral concern for the rich betrays his exegetical approach forcing him to pacify the radical message of Luke's Jesus in the beatitudes.

Chapter 3

Luke 19:1-10: History of interpretation

A new door for genuine reconciliation has been opened. We have an opportunity to do it right. And if we do this, our horizons established by the kingdom of God, our strength renewed by the hopes of the poor, our faith rooted in the reality of the Lordship of Jesus Christ, we will rediscover our voice, reestablish our belief that the world can be changed, that God's kingdom will come, and that God's will shall be done, on earth, as it is in heaven"
(Allan Boesak 2008, *And Zaccheus remained in the tree (Reconciliation and justice and the Truth and Reconciliation Commission, p. 653).*

3.1. INTRODUCTION

This Chapter will evaluate the scholarly interpretation of the Luke 19:1-10 Zacchaeus pericope over the years. It will demarcate two leading views from the interpretation history namely, traditional rendering as a conversion/salvation story, and the opposition reading as an *apologia*/defence story. The chapter will analyse two important words, that is, of *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 which are the interpretive nexus leading to either a defence theory or conversion theory in the history of interpretation. The context of the story as placed within the travel narrative of the Lukan gospel will serve as the backdrop of our interpretive thrust. Lastly, the chapter will highlight the radicality of Zacchaeus' response in Luke 19:1-10 within the overall Lukan message of "good news to the poor" and wealth and locate its place in the Lukan gospel narrative.

3.2. CONTEXT

3.2.1. Immediate context

The context of the story of Zacchaeus is the final stages of Luke's travel narrative (Lk 9:51-19: 27). The pericope is viewed as a symbolic summary of Jesus' ministry, that of seeking and saving the lost, before going to Jerusalem (see Pilgrim 1981). According to Méndez-Moratalla (2001:120), "Zacchaeus, a chief toll collector, is the final example of repentance in the travel narrative (19: 1-10)". Themes such as Christian discipleship, consumption and wealth, and attitude towards possession have been demarcated in the analysis of the pericope (Pilgrim 1981; Metzger 2007; Méndez-Moratalla 2001). The narrative context of the story of Zacchaeus and his encounter with Jesus is the period during which Jesus travelled from Galilee to Jerusalem. Scholars have

historically designated the material for the period as the travel narrative (see Lanier 2014; Metzger 2007). Through a series of parables and teachings, God's mercy and compassion is related by Jesus to the outcast and rejected in the travel narrative, a point highlighted by Manson (1975:282) who terms the material in the travel narrative, "*The Gospel of the Outcast*" (emphasis mine).

Though much of the Galilee-Jerusalem ministry travel events are present in all Synoptic gospels⁶⁵ (Mk, Mt and Lk), the Zacchaeus pericope is uniquely⁶⁶ Lukan. Luke has a unique source deemed "L" in addition to Mark and Q that he shares with Matthew (Fitzmyer 1985:1218; McMahon 2012:147-152). Luke has either copied the story from the uniquely Lukan source "L" or redacted the story from "L" to fit into his narrative plot (see Chineke 2017). Luke purposefully chose Christological occurrences that fit his gospel composing (Bock 1996: 1513-1524). Most scholars acknowledge that Luke had access to three sources – Mark, Q, and L. Yet, his altering of the Markan material, and the distinctive terminology, motifs, and theology found through critically analysing the text points to Luke's preservation of an older tradition (Galloway 2011:6-7). Accordingly, Luke took advantage of the resources at his disposal, aiding the theological goal of writing his gospel. Drury (1976:73-75) sees in the story, the fusion of three main sources, that is, Mark, Q, and the Septuagint (LXX). Nevertheless, his conjecture that the story is a redaction of the Jericho stories involving Elijah, Rahab, Joshua in the LXX, healing of Bartimaeus in Mark 10:46, and the saying of Jesus in Matthew 21:32 concerning tax collectors and harlots is speculative. There is scanty evidence that Luke concocted the account based on the LXX (O'Hanlon 1981:3). It is unlikely that Luke would invent stories, given his close affinity with Mark and Q (Marshall 1978: 80). Like all researchers of his time, Luke redacted his sources, giving them a Lukan feel, whilst preserving the historicity of his account (Lk 1:1-4).

Responsible exegesis of a particular text of a biblical author is only possible through the understanding the biblical author's themes (De la Potterie, quoted in Navone 1992:323). Zacchaeus's account, with its distinctly Lukan vocabulary and style, is

⁶⁵ Except for the "request of the sons of Zebedee" in Matthew 20:20-28 and Mark 10:35-45, Luke contains all the travel narrative's events.

⁶⁶ The other unique Lukan inclusion in the travel narrative is the "Parable of the Ten Pounds" in 19:11-27.

central to the broad context of Luke's Gospel, displaying and clarifying its major themes, whilst preserving reasonable traditional language drawn from an earlier source. The story of Zacchaeus is both the climax and conclusion of the travel narrative deemed the 'Gospel of the Outcast' (Lk 15-19).

Luke's profound influence is seen in the Luke 19:1–10 pericope, where every word is infused with the characteristic Lukan vocabulary, style, narrative structure, themes, and theology (Galloway 2011:6). As Luke weaves his language and moral theology into a tale about money and repentance, Zacchaeus, the story's primary rogue character, reveals the human face and joy of the gospel (Drury 1976:72). The use of 151 unique words⁶⁷ and phrases, in contrast to Matthew's ninety-five and Mark's forty-one, many of which are found in Luke 19:1–10, signify Luke's unique editorial hand (Hawkins 1909:15).

Fitzmyer (1981:113) claims that 90% of Luke's language is also found in the LXX, despite claims that Luke was influenced by Matthew or flimsy suggestions of a shared source with Matthew called "Q." The question of whether Luke used the same "Q" source as Matthew remains a sheer conjecture (Galloway 2011:6). Therefore, even the best of arguments on Luke's redaction of "Q", remain tenuous (Marshall 1978:30). Jeremias (1980:275-277) however alludes to possible preservation of an earlier source, written or oral, identified by traditional language replete in the pericope. This leads to the possibility of a Lukan reliance on an earlier source to which Luke laid his imprint (see Galloway 2011:33). The presence of parataxis (the juxtaposition of clauses with a simple conjunction) also points to an earlier source (Fitzmyer 1985: 1219). The non-Lukan origin of the story is also attested by the vocabulary and style of the pericope, such as the frequent usage of simple verbs and the use of the conjunctive *καί*, though this argument is inconclusive (See Fitzmyer 1985: 1219).

⁶⁷ Hawkins' study shows that these words and phrases must appear at least four times in one Gospel but not at all in the other two, or they must appear in that Gospel twice as frequently as the other two put together.

3.2.2. Zacchaeus in the broad context of Luke's gospel

An individual passage serves as a useful component of the overall narrative, rather than being an isolated fact (Tannehill 1991:3). The Zacchaeus pericope is therefore best understood by the broader Lukan narrative context, much as it clarifies and strengthens other Lukan texts in the narrative. Luke purports to have written an orderly narrative recital (*διήγησιν*). This, according to Hermogenes, the ancient rhetorician is a longer narrative consisting of numerous events in terms of ancient historiography, as opposed to a *diegema* which concerns a single account. Tannehill (1991:2-10) demonstrates that the term *διήγησιν* occurs frequently in rhetorical handbooks, much as in ancient historiography as in the early Greek histories of Herodotus and Thucydides. The *progymnasmata*, is one example of such handbooks, which were introduced students to the fundamentals of rhetoric useful in the composition of speeches and prose beyond the exercises of basic grammar and literary studies (Braun 1995:146). The rhetorical sophistication of the Lukan corpus suggests that Luke was schooled in the oratory and literary art of arguments and their effective presentation as well as material choice and arrangement which are the subject of rhetorical treaties (Satterthwaite 1993:344). The various rhetorical techniques in Luke's 19:1-10 suggest careful selection and arrangement, displaying Luke's rhetorical competence, and the ability of Luke's Greco-Roman audience to recognize and engage (Parsons 2007:19). Luke is a "master storyteller" who has purposefully placed Luke 19:1-10 within the context of his narrative as a persuasive story with a dramatic framework defined by flow, change, and conflict (Johnson 1977:22-25). Luke's Gospel is a masterfully crafted story with intra-textual parallels and echoes, with earlier stories setting up later events for readers, and later events reflecting on earlier accounts, both moving towards the fulfilment of a wider goal (Tannehill 1991:1-3). Individual pericopes contribute to the broader storyline, with the overarching purpose of providing their interpretive context (Dahl 1976:90). This is particularly true of the Lukan corpus (Luke-Acts). Through this, Jesus' ministry career fulfils Israel's salvific promise in Luke, and the apostles propagate that message to the latter ends of the earth in Acts with God's purpose controlling the storyline (see Galloway 2011:30). Luke's orderly account of the gospel prologue is thus a rhetorical presentation of material and not a chronological presentation of history (Dillon 1981:221-222).

Tannehill (1991:108) observes that Zacchaeus' story forms an *inclusio* with the account of the call of Levi (Lk 5:27-32), with the two stories providing an interpretive lens for

Jesus' ministry career. Jesus' "seeking-and-saving ministry" to the lost, specifically to tax collectors and sinners, is bookended by these two stories (Galloway 2011:44). Both the end of Jesus' extended travel to Jerusalem and his preparation for the next episode are marked by Zacchaeus story, making it an integral part of Luke's narrative; concluding one end of Jesus' ministry and preparing the next (Galloway 2011:31). It is the embodiment of the multivalent themes of the "Gospel of the Outcast" in special (*Sondergut*) "L" material (Mason 1970:282).

Striking parallels exist between the Call of Levi (Lk 5:27-32) and the Zacchaeus story (Lk 19:1-10). Both encounter Jesus at a seminal point in his ministry career, the former at the beginning and the latter at the end, and both are socially outcast tax collectors. Unlike Matthew and Mark, who identify Levi as "sitting at the tax office" (Matthew 9:9/Mark 2:13), Luke directly identifies Levi as a tax-collector (Lk 5:27), a critical motif in the development of his gospel. Luke demonstrates the relentless and redemptive attitude of Jesus towards tax-collectors. They respond positively to John's message and are model symbols of penitence and righteousness contrary to the self-righteous pharisees and Scribes (Lk 18:9-14), with Zacchaeus appearing as the last and chief representative figure (Loewe 1974:322). Jesus initiates contact with both men, and both respond positively to his invitation (Lk 5:27;19:5), resulting in both men hosting Jesus with celebration and joy (Lk 5:29; 19:6). Heeding Jesus' invitation and hosting him for a meal result in radical socio-economic consequences for both men, as Levi "leaves everything to follow Jesus" (Lk 5:28), and Zacchaeus pays restitution and divest all his wealth to follow Jesus (Bock 1996:1518). Following Jesus results in radical attitudinal change towards riches and possessions and radical divestiture for both tax-collectors. For example, in response to Jesus' abrupt dominical imperative, Levi responds immediately, rightly responding to Jesus' call for discipleship marked by radical renunciation of possessions (Coleman 2019:58). Levi still has enough remaining to host Jesus and the socially disenfranchised for a lavish banquet. This illustrates a nuanced combination of both leaving and using possessions for the benefit of the poor as the right response to Jesus' radical call, correctly portrayed throughout the narrative (Coleman 2019:59). This makes it possible for the poor and socially disenfranchised to move "from marginality to comradeship" (López 2012:44). Zacchaeus likewise makes a fourfold restitution, going against the bare minimum prescribed in the legal code, and coupling it with divestiture of half his assets, in

essence giving away everything that he owns to follow Jesus. Both accounts involve grumblings from the crowd (Lk 5:30; 19:7), questioning Jesus' association with their kind, and prompting Jesus to utter programmatic statements unpacking his mission (Green 1997: 84-86). It is against these pithy assertions forming an *inclusio* that the entire ministry of Jesus from start to finish is to be interpreted (Tannehill 1986:106-113). The story of Zacchaeus is a crescendo of closely knitted narrative episodes, woven together one after the other. Each contributes to and fills aspects of Luke's grand story with "The Call of Levi" as the start of this narrative flow culminating in its parallel in Luke 19:1-10, itself illuminating themes which were introduced in Luke 15:27-32 (Tannehill: 1986 106-113).

The journey motif is one biblical theme that Luke exploits, as nearly 40% of his Gospel details Jesus' purposeful travel from Galilee to Jerusalem, compared to only two chapters in Matthew and one in Mark (Filson 1970:3). Whereas differences of opinion exist regarding the end of the travel narrative, Jerusalem remains the climax and conclusion of Jesus' earthly ministry (Galloway 2011:35). The Spirit is poured out at Pentecost, stirring attendant missional fervor to the ends of the earth. This makes Jerusalem an important geographical location for Luke, as Jesus instructs the disciples to tarry for the Spirit's promise whilst praying (Galloway 2011:35). Luke's journey motif is an expansion of Mark's version (57 common verses) with fifteen uniquely Lukan passages appearing in uniquely Lukan style. These differ from both Mark and Matthew in order and context, implying a redaction and synthesis of three sources "Mark", "Q", and "L" to present a uniquely Lukan material and style (Robinson 1960:20-21). Luke's travel narrative is uniquely Lukan (Talbert 1974:114). The constant reminder that Jesus is enroute to Jerusalem creates a dramatic effect, setting Jerusalem as the narrative climax with heightened expectations in Jericho, the last station before Jerusalem (Ravens 1991:21). The appropriate Markan ending of the travelling narrative is Bartimaeus' opening of eyes denoting the disclosure of the messianic secret (O' Hanlon 1981:10). However, Luke concludes his journey motif with the story of Zacchaeus as a retrospective summary of Jesus response to the lost, integrating preceding themes and weaving them "...into a live, one-act portrayal of Jesus' entire journey (Moessner 1989:169). This culminates in the anticipated sufferings in Jerusalem, without which Jesus' mission would be incomplete (Ravens 1991:21). Only as readers draw connections between incidents, thinking back on earlier events and

contrasting them with current events, can the story of Zacchaeus be fully appreciated (see Galloway 2011:37). This is the way Luke has purposefully structured his Gospel to have an impact (Tannehill 1991:108),

The Lukan economic theme continues with Jesus taking a stand against the greed of the temple establishment (Phillips 2001:176-177). Luke gives a unique warning: “Take care! Be on your guard against all kinds of greed; for one’s life does not consist in the abundance of possessions” (Lk 12:15). This begins an elaborate teaching and parable section in the travel narrative, as the clearest and most laconic warning against wealth (King 2019:100). Luke perceives wealth to be a barrier to discipleship (Navone 1970:106). It is the sternest warning in the Lukan corpus that life’s worth cannot be gauged by how luxurious one’s possessions are (Seccombe 1982:139, 141). Rather than being a warning against the risk of diversion from the Word of God (Seccombe), this is a more comprehensive warning against possessions (Pilgrim 1981: 109-110; also in Gillman 1991:74). The warning is next followed by the Parable of the Rich Fool (Lk 12:16-21), a parable about greed and possession. This is exemplified by a self-absorbed ‘over-consumptive and hedonistic’ landowner with an insatiable ‘rapacious and aggressive’ desire to advance one’s interest at the expense of others. It is likely associated with a class of ruthless elite who show no concern whatsoever for the poor, inevitably coming up with a strategy that opposes Jesus’ objective to help the poor (Metzger 2007:83-84). This is because resources for others must inevitably be depleted as the wealthy guy accumulates more items in a limited-good society (Carroll 2012:268). In a short monologue, characterized by first-person singular verbs and pronouns, the man’s unrelenting self-focus is revealed, obsessed with the upkeep of his wealth whilst congratulating himself for his great hoarding feat (Coleman 2019:68).

The travel narrative (Lk 9:51-19:27) contains four uniquely Lukan parables that all deal specifically with possessions, and these begin with the story of the Rich Fool being the first. The context of the parable is the pharisaic hostility towards Jesus and his criticism of his opponents, whilst the immediate context is a plea for Jesus to adjudicate on matters of inheritance by a nameless man (Coleman 2019:67-68). Wright (2000:217-239) underscores the parable’s revealing and imperative power, emphasizing how the former describes the kingdom’s presence and its nature, while the latter calls readers to a change in behaviour, attitude, and worldview. Given the evangelist’s penchant for

issues of wealth and poverty, the descriptive use of riches in a parable nearly always includes imperatival overtones relating to the use of material things, even when wealth is not its major subject (Wright 2005:214; see also Blomberg 2000:127). The story shows that, rather than just being unfaithful or greedy, the correct response to Jesus requires a reorganisation of economic goals and activities (Johnson 1991, Seccombe 1982:144-145; Coleman 2019:69). The parable closes with the adapted “Q” material to give a moral lesson about renunciation of possessions, and almsgiving (Kim 1998:182-183), while its Matthean counterpart teaches about freedom from anxiety and faith in God. Renunciation and almsgiving are prompted by the absence of anxiety (King 2019:103). The Lukan instruction is profoundly challenging as it not only advocates for worry-free living (like its Matthean counterpart), but a life of radical giving of possessions (Johnson 1977:202). The subsequent imperatival overtones demonstrate that the meaning of being rich towards God and securing undiminishing treasure is to share with the poor – a use for riches that evidently never occurred to the self-centred man in the parable (Coleman 2019:69). Thus, Luke 12 is a skilfully built chapter of economic content highlighting economic themes and contains some of the strongest appeals to wealth renunciation and rebuttals against materialism, including ‘The parable of the Rich Fool’ (King 2019:104). The parable sets the stage for the Jericho encounter, where Jesus will meet another rich fellow in Luke 19:1-10. It remains to be seen whether rich Zacchaeus will pass the test of greed and wealth renunciation or spit at the face of the poor like the Rich Fool in the parable. The response of Zacchaeus in Luke 19:8 defies narrative expectation, as he transcends the clutches of greed and mammon worship, divesting his wealth to break the grip of poverty whilst mending the fraudulent ways of greed.

Luke synthesises his sources in the latter half of the Travel Narrative (Lk 15:1-19:10), demonstrating God’s concern for the marginalized, presenting unlikely candidates as positively responding to Jesus in what Manson has called “The Gospel of the Outcast”. Manson (1975:282) views the material from chapter 15 onwards, leading to the passion week as demonstrated in the Pauline text: “God commended his own love towards us, in that, while we were yet sinners, Christ died for us”. Zacchaeus is strategically paraded by Luke at the end of the Travel Narrative as a quintessential sinner. He is a supreme example of the lost in Luke’s programmatic and paradigmatic seeking and saving of Jesus throughout his travelling mission (Marshall 1978:694).

A defence of Jesus' ministry is offered in the parables of Luke 15 which begin with a pharisaic disapproval echoing the themes of Luke 5:29-32, and which are in the context of Levi's call recorded by all three synoptic gospels (Tannehill 1991:107). The penitential attitude of the sinners is explicitly (Lk 15:7; 15:10) and implicitly (Lk 15:25-32) contrasted with the self-righteousness of the pharisees and scribes, with the theme of joy in heaven over the repentant sinner (Galloway 2011:39-40). It is to sinners that Jesus' call for repentance is directed, and not the righteous (Kistemaker 1980:216). The themes of the parables, and the last parable particularly resonate with the Zacchaeus story in that both the prodigal son and Zacchaeus are irretrievably lost. Negative triad connotations are associated with the pair, that condemn both protagonists in the eyes of Luke's audience (Galloway 2011:41). The prodigal is "dishono[u]rable towards his father, dissipated in regard to lifestyle, and unclean on behalf of the swine". and Zacchaeus is the "chief tax collector, wealthy, and short The Lukan term for 'prodigal' is employed by both Aristotle and Plutarch in a bad light, denoting destructive waste and male prostitutes whereas Zacchaeus descriptors ridicule him as a morally challenged outcast (Behm 1967:423; Parsons 2001:50). The main character in both stories however is God, who in Jesus pursues and saves Zacchaeus, much as the father is extravagant in his readiness to restore the prodigal home (Stagg 1997:226). The saving love of the Father and Jesus trumps the protest voices of the elder brother in the parabolic story and the Jericho crowd in the Zacchaeus story. The parables of Luke 15 and the story of Zacchaeus are bound together by Jesus' aphoristic statement in Luke 19:10: "The Son of Man came to seek and to save the lost" (Tannehill 1997:107).

The themes in the story of Zacchaeus equally link to the parables of Luke 16. These model the redemptive use of money (parable of the Unjust Steward), and the perilous result of hoarding (parable of the Rich Man and Lazarus). The distinctively Lukan parable of the Rich Man and Lazarus (Lk 16:19–31) articulates the twin economic themes of good news to the poor and resistance to wealth (King 2019:104). In an apparent juxtaposition of sheer opulence and abject poverty, Luke paints a picture of a life of decadence and over-consumption in the face of pauperism. This contrast in life results in a contrast in death, resulting in the reversal of fortunes in the afterlife. The Rich Man's failure to dispose of excess resources bars him from entering heaven

(Metzger 2007:156). Simply put, the rich man is condemned due to his wealth (King 2019:106). Seccombe (1982:180-181) views the parable as dealing with “extremely far-reaching demand for charity to the needy” Nevertheless he acknowledges that Luke makes it clear that people who close their hearts to the poor will always be outside the Kingdom. It is the fact that the wealthy man ignored obvious suffering while he was in its presence that condemns him (Philips 2001:155-160). The rich man is however not just guilty of disregarding Lazarus, he is guilty of hoarding wealth in the face of poverty (Pilgrim 1981: 59-60, 113-119; Kim 1998: 188-191; De La Torre 2002:79; Hays 2010: 153-158; Levine and Witherington 2018: 454-455). The parable connects the twin themes of “good news to the poor” and ‘resistance to wealth’, as “Luke continues to insist that right response to Jesus and his message always involves the renunciation of personal benefit from wealth for the sake of the poor” (Coleman 2019:79). The renunciation and almsgiving ethics are interwoven in Luke as demonstrated by the parable, and the attempt to separate them proves absurd as the two remain a unit (King 2019:107).

Zacchaeus effects restitution to build bridges with his estranged poor countryman in the same way that the 'Unjust Steward' uses his influence to break the cycle of debt and poverty, endearing himself to his fellows. Zacchaeus also gives generously to the poor, unlike the rich man in Luke 16:19-31 (Loewe 1974:323). Luke thus weaves together the thoughts in the twin sets of parables to prepare his readers for the conversion of Zacchaeus; that is, criticism of the self-righteous Pharisees and having a correct attitude towards repentant sinners and wealth. The Lukan instruction to the disciples is that wealth must be renounced, whereas the Pharisees are indicted for their despisal of repentant sinners and love for money (Nolland 1993:796).

The immediately preceding pericopes of Luke 18 are also closely related to the Zacchaeus story in Luke 19:1-10. The persistent widow is undeterred by the unrighteous judge, showing determination in her pursuit of justice in the Luke 18:1-8 parable about relentless prayer. In the same way, Zacchaeus is relentless and undeterred in his efforts to see Jesus, despite his notoriety and stature, before the crowds (O' Hanlon 1981:9). The question of faith at the end of the parable is answered by the subsequent literary section which demonstrates that repentance, trust, and faith are the right attitudes towards the divine salvation offered by grace (Galloway 2011:45).

Instead of the righteous Pharisee, God justifies the contrite, humble tax collector in Luke 18:9-14, with the vulnerable children allowed kingdom entry without question in Luke 18:15-17. The failure of the rich ruler to trust God and let go of his possessions becomes his deterrent to enter the kingdom in Luke 18:18-34. This is contrasted with the destitute blind fellow outside society who is granted kingdom entry in Luke 18:25-43. Zacchaeus, the sinner par excellence, enters the kingdom through repentance and restitution, whilst the crowd receives justice (*contra* Loewe 1974: 330, who sees the crowd as left outside the kingdom). The Pharisee and the affluent ruler do not exhibit proper faith, while the tax collector, the children, the helpless blind man, and the short, rich, chief tax collector do. This marks the Lukan motif of reversal of fortunes in which “some are last who will be first, and some are first who will be last” (Galloway 2011:45-46; Luke 13:30).

The parable of the ‘Rich Young Ruler’ has almost always been interpreted together with the Zacchaeus narrative in Luke 19:1-10. The two pericopes have in the main been the interpretive thrust of the Lukan wealth-poverty ethic (King 2019:107). The two encounters help us understand the demands of Jesus on the rich (Kings 2019:107), whilst they also help answer the question of who is worthy of entering the kingdom of God (Coleman 2019:79). The two stories represent Luke’s “cumulative picture of the tension between riches and discipleship” and are a befitting climax to the build-up on the previous episodes (Coleman 2019:90). The first encounter presents Mammon (riches) as an impediment to genuine discipleship and entry into God’s kingdom, whilst the second encounter the power of mammon is broken marking loyalty from riches to God (Coleman 2019:90).

Ringe (2004:60) discusses the synoptic versions together, since Matthew and Luke’s versions of the story differ from Mark’s original only in a few minor aspects. The miniature differences in the sociological description of the man as “high-ranking and affluent” in the Lukan presentation of the first story is an important identity marker. It has a significant reshaping and accentuating effect (Schottroff & Stegeman 1986:74; also in Kim 1998:191-192). Another important observation is that the Rich Young Ruler stays in the Lukan scene to hear all the demands of Jesus’ kingdom message and the concomitant actions required for entry. Such demands have become a normal part of discipleship, hence the Lukan omission of the disciple’s awe (*contra* Mark) at Jesus’

call (King 2019:109). Luke has enough ground at this stage to make a demand to sell everything. He has built a strong case for divestment, wealth renunciation, for the benefit of the poor, and changing allegiance from money to God (Hays 2010:172; also in Coleman 2019:81). Luke's wealth ethic is compatible with Jesus' direct but unsurprising instruction to the rich ruler (King 2019:110). It is significant that the appeal of Jesus to the parallel checklist from the Decalogue, sparked by the man's polite yet hypocritical address, omits the command: "You shall not covet" (Coleman 2019:80-81). The knowledge that the wealthy man has a dysfunctional relationship with money is present with Jesus, even though the narrator has left this out (Ellul 1984:86). Jesus questions the man's irreverent address, viewing it as ironic, since the man addresses him as dignity accorded deity, yet he does not view God's word as authoritative to him (by yielding to covetousness) (Coleman 2019:80). The acquisitive heart of the Rich Young Ruler thus signifies incomplete devotion required by the silent commandment, which is the overarching thread in the whole package of commands (Coleman 2019:81). Since concern for the poor is the sign of a right response to Jesus a fundamental transformation in the rich man's heart is shown by his rejection of the wealth of this world in favour of those who have none (Coleman 2019; De Santa Ana 1979:25). The rich man is bound to idolatry, desiring to enter the kingdom of God but without switching allegiance from money worship to God (Talbert 2002:202). There are no two ways about the requirement of entering God's kingdom, only the twin practices of leaving and following as practiced by the disciples and affirmed by Jesus can guarantee entry (Coleman 2019:82). It would be overstated to claim that one cannot be wealthy and a follower of Jesus. Nevertheless, wealthy followers of Jesus who do not give generously in almsgiving and sell their possessions to benefit the poor never show up in the Gospels (Blomberg 2000:145).

This conclusion stands, despite attempts to minimize the force of the radical Lukan ethic. Such efforts question whether Jesus is calling on the Rich Young Ruler to be part of Twelve or viewing Jesus' command as an isolated matter only binding to the Rich Young Ruler (Pilgrim 1981:89). Luke's message can only be minimized by claiming that it calls for less drastic action or that its demand is so extreme that it cannot be intended to be carried out (King 2019:113). Phillips (2001:163), for example, views Jesus' radical call as a negative example that either does not demand total divestiture or unrealistically calls for it. This assertion comes, even though, there is no Lukan

example for total disinvestment, notwithstanding the disciples' having left all to follow Jesus as seen in (Lk 5:11, 28) (Schottroff & Stegemann 1986:75). Kim 1998:498) attempts to weaken the radical message in the Lukan ethic by driving a superficial dichotomy between sedentary and itinerant disciples with separate sets of wealth ethic. That is, the former are accorded the luxury of hoarding, and the latter are called to divest weaken. This attempt is equally seen in the dismissal of Jesus' radical command to the Rich Young Ruler as an irrelevant extreme scenario as having no practical bearing on the followers of Jesus' view of possessions today (Seccombe 1982:133-134). Nevertheless, one cannot reduce 18.22 to mythological ignominy by preventing its 'compelling divestiture' for all Luke readers (Hays 2010:173). The requirement to relinquish all is radical in that it demands total abandonment, just as Levi, Peter, James, and John were reputed to have done (Hays 2010:174). The goal of leaving or selling all is to uplift the poor as God does and not revel in them, since Luke never idealizes poverty (King 2019:114). The ruler is asked to give to the poor and not toss away his goods (King), and this is an admirable sign of a disciple's willingness to be poor to follow Jesus (Stegeman 1984:50). The only way the ruler can participate in the kingdom of God, as others of his kind are graciously doing, is by giving up his position as a rich man and redistributing resources according to the Nazareth model to help the needy (Metzger 2007:169-170). The unnamed Rich Young Ruler's attachment to wealth disqualifies him from being a Jesus follower, negatively illustrating the "woes" of wealth proclaimed by Jesus (Lk 6:24-26; 18:24; Coleman 2019:83). Every Lukan pericope's narrative context thus becomes crucial in demonstrating the evangelist's intentionality and order. This is because each of the earlier stories and parables illuminates the Zacchaeus story in Luke 19:10, with the Zacchaeus story serving as the culmination of Luke's Gospel up to this point (Galloway 2011:53).

Even though no passage in Luke's gospel has been the focus of considerable discussion regarding whether it idealizes renunciation or is less radical, Jesus' interaction with the rich ruler and the teaching and dialogue that follows (Lk 18:24-30) are the most overt invitations to renunciation (King 2019:182). The crux of the debate rests on the phrase: "through the eye of a needle" (Lk 18:25), and its legitimacy for renunciation (Brown 1992). The discomfort with this clear message is already demonstrated in how Seccombe (1982), Kim (1998), Phillips (2001) work hard to emaciate its radical import, whilst Hays (2010) struggles with its modern application

and relevance. This uneasiness is also evident in some scribal redactions of the various manuscripts, such as the Codex Sinaiticus (χ), which replaces the word $\pi\acute{\alpha}\nu\tau\alpha$ “all” with $\tau\grave{\alpha}$ $\acute{\iota}\delta\iota\alpha$ “instead” to indicate unease with the radical message of divestiture (King 2019:185). The discomfort is also apparent in the patristic writings, with Cyril of Alexandria among those who observe that an imagination of a ship’s rope rather than a camel passing through a needle is more plausible. Hillary of Poitiers reduces the needle to the gospel metaphor accessible only to the gentile without the law, whilst the Jews are obstructed by the burden of the law. Ambrose of Milan ascribes arrogance as a deterrent for passing through by refocusing the subject on one’s attitude towards wealth instead of its possession (Oden 2010). The attempt to subjugate the Lukan radical message is evident in the three patristic works (King 2019:18). Clement of Alexandria tempers Luke’s radical economic message in a manner similar to Phillips and others by promoting the notion that it is one’s attitude toward wealth matters, not their possession of riches (King 2019:186). Of course, Phillips has drawn a leaf from Clement in his reading of issues of wealth and poverty in Luke-Acts (Phillips 2001:260-266). Though being the first to examine the relationship between faith and wealth in a systematic way, Clement completely avoids the gospel’s command by switching from possession to attitude (Gonzalez 1990:112; King 2019:187). Clement’s reading is a pastoral concern aimed at assimilating the rich into the church, giving them hope that God’s kingdom is equally theirs. With casual adjustment, and their wealth intact, and they need not abandon the Christian faith nor hope of heaven (Clement, *Quis div.* 2; also see González 1990: 112; Phillips 2001:261; Rhee 2012: 78). Modern exegetes will find it much simpler to give deradicalized interpretations of the economic content that undermines Luke’s impact now, as they did in the third century in Luke-Acts, thanks to the early efforts of interpreters like Clement (King 2019:198). Ultimately Clement’s reading is an allegorical, symbolic distortion of the biblical text, picking and choosing verses to suit his interpretation whilst altering the meaning of the biblical text, completing ignoring the radical message of Luke for the rich.

On the contrary, since it embraces the Lukan radical economic message, the Pelagian work, *On Riches (De Divitiis)* from the early fifth century (408-414 CE) provides a counterargument to Clement’s interpretation (The Letters of Pelagius and his Followers, 1991; see King 2019). *De Divitiis* advocates for the literal meaning of Jesus’ statements in support of the poor and against money, contending against their

allegorical reading, with Luke's gospel as the main supporter of this contention (King 2019:199). Interpretations like that of Clement which suggest that it is possible to purge oneself of greed without purging oneself of wealth are immediately opposed by *De Divitiis*. Since the two are inseparable, striving or holding on to wealth while being under the power of greed makes the ethic of attitude impossible (King 2019:200). The mantra of *De Divitiis* is taken from the uniquely Lukan saying by Jesus that discipleship is impossible without wealth renunciation (Lk 4:33). This rejects Clement's economic rich-poor dualism whilst advocating for a midway which is self-sufficiency. *De Divitiis*'s polemical adage *sufficientia* shows with harsh precision the boundary of economic destitution below which the poor had been forced by the sheer existence of the privileged. This is contrary to Brown (1992:315-316) who suggests that *sufficientia* was a generally imprecise term for sufficiency in terms of possessions. To be rich is to have more than is required, and to be poor is to be less than is necessary, one must possess no more than is necessary (*De Divitiis*, 5.1.). It disapproves of the selective appropriation of Jesus' words to the apostles only during difficult times in the interpretations of some, like Kim (1998) who rejects them as logically incorrect (*De Divitiis* 10.4). In contrast to how the wealthy can be disciples while maintaining their money, the Zacchaeus narrative is an illustration of deliberate disinvestment to right the wrongs and share in the blessings of the poor (*De Divitiis* 11.7., see King 2019:204). *De Divitiis* rejects metaphorical interpretations that seek to exonerate the rich from the New Testament ethics as weakening the gospel. Such interpretations adapt its message to suit their lifestyle and fail to heed the commands to renounce wealth. They clearly see God as siding with the poor and challenging the rich to join God's side. Without embellishing or allegorising it in any way, *De Divitiis* takes Luke's radical economic message at its word and extracts a message of hope for the poor and opposition to wealth (King 2019:209). The church depends on the wealthy and powerful, who the Lukan utopian ideal sharply criticises, and its marginalization and explaining away is an effort to keep them around (King 2019:210). Despite keeping the commandments, Luke saw the wealthy as cursed because they prioritized their immediate needs, serving "mammon" rather than God, and, worst of all, disregarding the poor (Alana 2002: 5). Therefore, Luke needs to be moderated and tamed to make it more in line with social reality since it is too extreme and idealistic to be orthodox (King 2019:210).

3.2.3. Themes and theology

Luke 19:1-10 embodies the *soteriological tenets* of the twin Luke-Acts Lukan volume. The salvation of mankind through Jesus is the overarching theme of the Lukan corpus⁶⁸ (Marshall 1971:116). This is aptly summed by Luke 19:10 text: “For the Son of man came to seek and to save the lost”. This missional thrust finds concrete expression in the saving of Zacchaeus who was certainly lost. The Lukan usage of the nouns “saviour” and “salvation” is exclusive and his use of the verb “to save” is distinctive (Galloway 2011:12). As noted earlier, Luke’s use of the term salvation with its related cognates is all-encompassing, embracing socio-economic, political, physical, and spiritual dimensions. Luke views God’s plan in salvific terms and employs soteriological lenses to interpret the life of Jesus Christ.

Luke alone extends the Isaianic passage quoted by the synoptic gospels in Isaiah 40 to underpin the salvific motif by including the phrase “all flesh will see the salvation of God” (Lk 3:6). This emphatic soteriological motif resounds in Luke 19:10, which expresses Jesus’s soteriological goal “to seek and to save” in clear terms.

The four Lukan pericopes⁶⁹, two of which he shares with the other Synoptics, have a Lukan qualifier “your faith has saved you” in the lips of Jesus to underscore the connection between *faith and salvation*. Thus, faith which produces “fruits worthy of repentance” (Lk 3:8) is a requisite human response to the salvation offer. The inference of both faith and repentance is present in the Zacchaeus story who demonstrates faith in Jesus by trying to see Jesus. He overcomes limitations imposed by his stature and the crowd, and effects restitution to right the wrongs committed prior to meeting Jesus.

As it shall be demonstrated, it is precisely here that the defenders of Zacchaeus as a righteous man have erred.

⁶⁸The *inclusio* in Acts 28:28, where Paul says that “this salvation of God has been sent to the Gentiles,” correctly demonstrates that salvation is the two-volume work’s central focus (see Galloway 2011:13-14). The church in Acts thus implement the salvific offer by Jesus at his ministry inception (Nave 2002:28; see Galloway 2011).

⁶⁹ Two common stories are the woman with the issue of blood (Lk 8:43-48) and the healing of Bartimaeus (Lk 18:35-42, Luke has added the story of the sinful woman (Lk 7:37-50) and the story of the Samaritan leper (Lk 17:11-18).

Godet (1872), the inventor of the interpretation of Zacchaeus as a good man, acknowledges that it is Jesus' presence, not Zacchaeus' atonement and almsgiving, that gives him salvation and makes him a spiritual son of Abraham. Fitzmyer (1985:1220) in his elaboration of Godet's theory, shifts the merit of salvation from Jesus to Zacchaeus, with Zacchaeus earning his salvation through his works, and Jesus simply endorsing or vindicating his innocence. Mitchell (1990:169) further sees Zacchaeus earning his justification through his works.

To view Luke 19:8 as a defence, is to diminish the profound claims of salvation in 19:9-10, removing the necessity of Jesus for salvation and implying that Zacchaeus has attained salvation on his own (Karris 1990:711). There is no evidence of Zacchaeus' vindication in Luke 19:1-10, and this view is incompatible with the Lukan soteriological motif that places a high premium on repentance, forgiveness, and faith. (see Veras 1996:95-97). The idea of earning salvation through works is also foreign to Luke, and if Zacchaeus is not repenting, then it would mean that Jesus has not forgiven him. This makes the pronouncement in Luke 19:9-10 untenable since Jesus would have brought salvation to an unlost person who has no need for repentance. There is no salvation through vindication in Luke (see Veras 1996:98).

The *motif of joy* is also one characteristic of the Lukan gospel. The annunciation passages in the infant narrative underscore joy at the birth of John, with the attendant rejoicing by many (Lk 1:14). Shepherds also receive the good news of great joy at the birth of the Christ-child (Lk 2:10). Thus, all main actors in the infancy narrative express the motif of joy⁷⁰. This thematic expression of joy continues well into the ministry of Jesus, who instructs the disciples to rejoice and leap for joy when faced with persecution (Lk 6:23) in the last beatitude. The seventy-two disciples equally rejoice at their authoritative subjugation of demons in their missionary journey (Lk 10:17). The theme of joy is also captured in the triadic parables of chapter 15. Here, the shepherd rejoices at the retrieval of his lost sheep (Lk 15:6), the woman rejoices at the recovery of her lost silver piece (Lk 15:9), and the father rejoices at the return of his prodigal son (Lk 15:32). The joyful reception of Jesus by Zacchaeus (Lk 19:6) is thus a welcomed

⁷⁰ Zacharias (Lk 1:14), Elizabeth (Lk 1:25; 42-45) Mary (Lk 1:47), Simeon (Lk 2:26-32), Anna (Lk 2:38), and foetal John in (Lk 1:44).

response since Luke has already imprinted in the mind of his readers the theme of joy as an appropriate response to Jesus (Navone 1970:73).

Zacchaeus story is also a *paradigm of repentance* in Luke's gospel, even though the word repentance is absent. The theme of repentance is first introduced by John the Baptist in socio-economic terms as he challenges the imperial agents of Rome to "producing fruit worthy of repentance" (Lk 3:8). John claims that the outward sign of admitting guilt and receiving forgiveness for misdeeds are practical socio-economic measures to repair historical mistakes. Zacchaeus fulfils John the Baptist's call for repentance by returning four times as much as he had fraudulently acquired while working as a tax collector (see Galloway 2011:17).

Mark and Matthew preserve the saying: "I did not come to call the righteous but sinners" (Mt 9:13; Mk 2:17). However, Luke adds "to repentance" (Lk 5:13) signifying that Jesus has come to call sinners to repentance whilst warning the pharisees of the impending doom if they don't repent (Lk 13:1-5). The theme of repentance climaxes with the parables in Luke 15, as Luke reiterates that there will be more joy in heaven over one sinner who repents than over ninety-nine righteous people who need no repentance (Lk 15:7). As a result, Luke uses Zacchaeus as an example of the genuine repentance that John, Jesus, and Peter all preached about.

The need of Zacchaeus salvation is highlighted by Luke, in that it was necessary for Jesus to stay at Zacchaeus' house. This *divine necessity* is denoted by Luke's use of the term *dei*, placing the salvation of a corrupt tax collector as a necessary act on the way to Jerusalem. Thus, the divine plan of God is at the centre of Jesus' mission. Luke wants his readers to grasp the controlling purpose of God as a unifying thread in the story (Tannehill 1986). *Dei* (Divine necessity) is therefore the conceptual framework of the Lukan corpus (Conzelmann 1964:151-154). This "divine must" is evident in the necessity of the boy Jesus to remain in his Father's house (Lk 2:49). It is evident in the necessity of the journey towards Jerusalem (Lk 13:33), the necessity of the passion (Lk 17:25), and entry into celestial glory via death (Lk 24:26). The conversion of Zacchaeus is thus a microcosm of the grand plan of God to save humanity through the cataclysmic events awaiting Jesus in Jerusalem.

The Lukan theme of “*today*” recurs in Luke 19:5 and 9 of the Zacchaeus story, echoing Luke's view that salvation is possible ‘now’ and is for ‘today’. Luke had already etched this theme in the angelic Christological birth announcement to the nomads: “Today in the city of David there has been born for you a Saviour, who is Christ the Lord” (Lk 2:11), the Nazareth manifesto declaration: “Today this Scripture has been fulfilled in your hearing” (Lk 4:21), and sealing it in the crucifixion response to the penitent thief: “Truly I say to you, today you shall be with Me in Paradise” (Lk 23:43). Zacchaeus, the repentant chief tax collector fraudster, also benefits from the Lukan immediate view of salvation in the here and now necessitated by the need for Jesus’ stay at his house “today”, culminating in Jesus’ proclamation: “Today salvation has come to this house”.

The Zacchaeus story is thus the quintessential representation of the Lukan themes and perspectives, in which Luke has intentionally interwoven a microcosmic depiction of his gospel narrative through style and language. The absence of the story in Matthew and Mark, makes it a uniquely Lukan invention, prompting Bultmann to label it “manifestly imaginary” (Bultmann 1963:34).

3.3. LITERARY FORM

The literary form of Luke 19:1-10 is also the subject of much debate and speculation. Bultmann (1963:55-57) categorizes the text as a biographical apophthegm representing both an ideal and metaphorical situation. It is difficult for Jesus to speak about Zacchaeus in the third person right after Zacchaeus addresses him personally, according to Bultmann, who notes that some versions lack the *pros auton* in Luke 19:9a. The fact that Jesus establishes his relationship to Zacchaeus purely on Jewish grounds, and not by appealing to his morality also makes Luke 19:9 rather than Luke 19:8 a focal introductory point, marking Luke’s redaction to suit his moral (Bultmann 1963:34). For Bultmann, the story is an intentional Lukan redaction of the call of Levi (Matthew) in Mark 2:14-17. The specifics in Zacchaeus’ story however refute the suggestion that the story is a mere expansion of Levi’s story (Fitzmyer 1985:1219).

The narrative disturbance produced by Luke 19:8 is recognized by both Knox (1957:112) and Marshall (1978:695) as a Lukan insertion, whilst Schweizer (1984:290) see it as a pre-Lu[k]an insert. The Lukan interpolation in Luke 19:8 by the Bultmannian

assessment is supported by Fitzmyer, Talbert, and Kariamadam⁷¹ who all contend that this is obvious on linguistic as well as narrative and thematic grounds.

In the same vein, Bultmann (1963:34), and Schweizer (1984:290) suggest that Luke 19:10 is also a Lukan addition to the narrative, with Kariamadam (1985:43) agreeing, given its narrative vagueness. Fitzmyer (1985:1219) believes it to be a pre-Lukan addition, and Marshall (1978:695) believes it is a misplaced statement of Jesus.

Dibelius (1970:50-51) sees Luke 19:1-10 as a personal legend, although with a historical core (see also Marshall 1978:695). The actual key to understanding the Travel Narrative is to read Jesus and the other characters, respectively, as Moses and the people described in Deuteronomy, according to Moessner, recognizing that Luke depicts Jesus as a prophet like Moses (Moessner 1991).

Tannehill (1981:1-13, 113); see also O'Toole (1991:107-116) have argued for a pronouncement story, particularly of the quest type, for a proper reading of Luke 19:1-10 (see also Fitzmyer 1985:1219). According to Tannehill (1996:112), there are four unique Lukan quest stories, while seven out of nine of the synoptic quest stories are found in Luke. In Zacchaeus' account, he too finds himself on a mission akin to those of the widow in 18:3, the children in 18:15, and the blind beggar in 18:35 (Richardson n.d. 2).

3.4. IMPERIAL-CRITICAL AND EXEGETICAL ANALYSIS OF LUKE 19:1-10

In the second of a pair of pivotal interactions with the rich in Luke's gospel, Zacchaeus, exemplifies the potential for a rich man to become a disciple by heeding the warnings and exchanging the dominion of money for that of God (Coleman 2019:82). By introducing Zacchaeus as a wealthy top tax collector, Luke throws a wrench in the works, leading readers to make multiple assumptions and inviting conflicting messages about tax collectors (Thompson 2007:82). For example, the Lukan leitmotif betrays Zacchaeus as an outsider from the Abrahamic heritage, given his rich status (Richardson n.d. 2). The negative example of the Rich Young Ruler coupled with the generally negative portrayal of the wealthy in Luke, makes us wonder if the salvation of a rich tax collector in Zacchaeus is possible (Loewe 1974:322-323). Zacchaeus went above and beyond the call of charity and generously handed half of his money to the

⁷¹ See Fitzmyer, Luke X-XXIV, 1978 1219; Talbert Reading Luke 1982:176; Kariamadam, Zacchaeus story, 1985:33-38).

needy. He provided four times as much compensation to those he had cheated from the remainder and went above and beyond the legal standards for restitution, i.e., one and one fifth (Alana 2002:5).

The wayward tax collector is confronted by Jesus and resolves to turn over a new leaf in his life. According to the Christian tradition, this has consistently been interpreted it as a salvation story, inviting compelling arguments that have surfaced in the modern-day, drawing attention to a different reading. These contend that Zacchaeus' comments should be seen as a defence of his good deeds as opposed to a declaration of purpose to turn over a new leaf (Alana 2002:6). O'Toole (1991:109) for instance argues that reading 19:8 as a conversion act does not require reading 19:1-10 as a conversion story.

Notwithstanding, Luke's portrayal of Zacchaeus is of a man separating himself from his goods and slipping through the eye of the needle in demonstration of the liberating power of God, which inspires hope in wealthy aspiring disciples (Petracca 2007:18-23). Since the cumulative gospel vision of discipleship has been linked to behaviour toward the needy and impoverished, Zacchaeus' seeming transition into a follower of Jesus occurs precisely at the moment of his relationship to the poor (Coleman 2019:82). Luke has inserted the healing of a blind beggar (Lk 18:35-43) exhibiting an encounter with the marginalized as a norm for the rich's discipleship in between the climactic negative and positive examples of discipleship (Coleman 2019:82). It is against the backdrop of these two pericopes, that the story of Zacchaeus must be understood and interpreted (Hobbie 1977:286). The connection between the healing of the blind beggar and Zacchaeus is complementary, serving to illustrate how people respond to and appropriate Jesus' gifts. The former is portrayed as "vertical" in nature because he follows Jesus and exalts God, while the latter is portrayed as "horizontal" because he promises to pay back anyone he has wronged (Talbert 1982:175). Zacchaeus' response is antithetical to the Rich Young Ruler, pledging a quadruple restitution of illicit gain whilst divesting half his wealth to the poor as a sign of obedience and welcoming Jesus (Coleman 2019:83-84). He commits to both justice and the continuous practise of sacrificial giving, whilst making a resolute declaration implicitly stating his resolve to end corrupt behaviour in the present and the future (Coleman 2019:84).

The difference between Zacchaeus and the Rich Young Ruler, and the demands of Jesus to the pair have often been pitted against each other. The notion of how a righteous Jewish insider (Young Rich Ruler) gets rejected and a sinner outsider (Zacchaeus) gets accepted in terms of Jewish life is intriguing (See Phillips 2001:169-170). For Phillips (2001:170) the most significant difference in the two stories is the command of Jesus. Whereas Jesus commands the Rich Young Ruler to sell everything, Zacchaeus only gets to give half his wealth to the poor, with Jesus praising his actions. Jesus has [allegedly] shifted from demanding total renunciation from the Rich Young Ruler to applauding Zacchaeus' partial divestiture of his assets (King 2019:115). Seccombe (1982:132) views the two stories as paradigms of response, placing significant differences in how each of the pair responds to Jesus' demands. Both Phillips and Seccombe loathe the idea of renunciation as normative, since Jesus not only accepted but praised Zacchaeus' partial divestment, choosing to rather blame the Rich Young Ruler's response.

Kim (1998:199) views the two accounts as the only instances where the amount of material possessions to be given is explicitly stated. Here the difference in the amount Jesus prescribes to the Rich Young Ruler differ from the voluntary percentage of possessions given by Zacchaeus. This suggests that renunciation is not Lukan, and that individuals should voluntarily give whatever percentage they deem fit. According to Kim, the voluntary percentage given by Zacchaeus trumps the renunciation demand by Jesus to the Rich Young Ruler, becoming a general rule for subsequent followers of Jesus (see King 2019:117). King (2017:117) rightly observes that the three interpreters, Seccombe (1982); Kim (1998); Phillips (2001) wrongly marginalize rhetorically the story of the Rich Young Ruler. King claims that that voluntary giving must be something other than a renunciation by associating Jesus' demand for renunciation and complete divestiture for the benefit of the poor as an anti-Lukan obsessive aberration. These interpretations eliminate any normative suggestions of renunciation of wealth, asserting that Zacchaeus' act was voluntary and not Jesus' command. By emphasizing the voluntariness of Zacchaeus' gift these interpretations therefore seek to soften the meaning of renunciation by doing away with the concept of total renunciation, deradicalizing, domesticating, and defanging Luke's radical gospel (King 2019:118). Seccombe's (1982) assertion is inexplicable that Zacchaeus'

financial status was substantially unchanged after his contribution, despite it being voluntary (see Kim 1998).

Pilgrim (1981:133) offers a sobering perspective by observing the radicality of Zacchaeus' voluntary divestment. Usually, only one-fifth of one's income and not half one's possessions was seen as consistent with the will of God in the Hebrew scriptures and rabbinical literature (see also Tiede 1988:321; Barclay 2001:278-279). Zacchaeus thus goes beyond the normal definition of almsgiving in an act that even modern followers of Jesus would deem extreme and radical (King 2019:119; See also Schottroff and Stegemann 1986:109). Giving half of his ownership and compensating four times meant that Zacchaeus practically gave all he had, presuming that just one-eighth of his goods originated from honest dealings, since being a tax-collector involved a lot of exploitation (Malina & Rohrbaugh 2003:387-388; Wright 2001:222-223; see King 2019:119). This is contrary to O'Hanlon (1981; see also Seccombe 1982) who suggests that Zacchaeus remains well-off since he administered a once-off restitution and divestiture of only half his assets, thus failing to grasp the cumulative import of the twin acts. According to Metzger, an early Greek uncial with a possessive, genitive pronoun suggests that Zacchaeus is promising to give away half of everything he owns rather than pledge to give the poor half of his money and keep the other half for himself (Metzger 2007:176).

The need to care for the poor and to administer restitution makes Zacchaeus divide his wealth practically by giving all he has (Tannehill 1996:277; see also Wright 2001:203). To carry out Jesus' mission of economic justice, Zacchaeus concerns himself with redistributing wealth in a more equitable manner. This makes the surrender of wealth and concern for the poor inextricably interwoven (Metzger 2007:176-177; see also King 2019:120). This is an act of self-purging, liberating himself from the clutches of mammon worship, while at the same time, rejecting the imperial system of exploitation that characterize Roman culture (Crowder 2007:179). This is because the Romans did not pay the tax collector a salary; instead, he cheated the populace by taking as much money as he could from them. He paid the proper amount to the Romans, and then kept the extra money he had dishonestly amassed (Hale 1996:345). These actions gave rise to the reputation of a publican as an extortionist (Hendriksen 1978:208).

Zacchaeus exemplifies the hallmark of repentance fuelled by a redeeming act of regeneration in his use of the word “*idou*” (behold). This conveys an abrupt determination signifying a solemn, substantial, and quick conclusion and demonstrating a dramatic turnaround (Harold & Alexander 2015:7). In an unwavering swift act of repentance, Zacchaeus, pursues reconciliation through restitution (Harold & Alexander 2015:7). Quick action and total restoration on the part of Zacchaeus’ begins with an admission of historical, personal, and collective culpability (Maluleke 2008:687). Zacchaeus is thus a role model of radical divestiture for wealthy Christians who want to deal with their possessions in a way that goes beyond simple almsgiving (King 2019:120). In contrast to the Rich Young Ruler, Zacchaeus refuses to allow his possessions to stand in the way of his journey to salvation and heaven. Instead, he chooses to act in solidarity with the poor and pursue justice that brings salvation and liberation to both the oppressed and the oppressor alike (De La Torre 2015). Moved by the Saviour’s mercy, Zacchaeus not only gives half his possessions, but performs a fourfold restitution (Hobbie 1977:286-288).

It is interesting to notice that the proclamation “Today salvation has come to this house,” came right after Zacchaeus decided to divest his money, showing his commitment to a new life and resulting in the salvation that Jesus gave to him and his family (Schweizer 1982:34). Even though the Lord did not test him, Zacchaeus was challenged and determined to share his wealth after the murmur of the audience (Lk 19:7) prompted a sense of remorse and shame in him (Alana 2002:15). The suggestion by Evans (1990:661) that Zacchaeus’ commitment of renunciation and restoration was “rewarded” by the salvation granted to his household undermines the Saviour’s grace in seeking and saving Zacchaeus. To say that reconciliation took place before restitution, as claimed by Schweizer (1984:291-292), is to downplay the human partnership needed by the Lukan rich to switch alliances from wealth to God and make it right by the poor. Zacchaeus serves as an example of how a wealthy person can find salvation through repentance (Tuckett 1996:98). He showed his repentance via his deeds, which freed him from the love of money that had kept him bound to this world and restored his identity as a Jew and an Abrahamic son (Goulder 1989:677; Gooding 1987:299). Following his conversion, as an act of repentance, and due to his dedication

to Jesus, Zacchaeus decided to share his fortune among the needy and those he had cheated (Alana 2002:15).

One of the great features of Luke 19:1-10 is that it highlights a glaringly overlooked part of genuine repentance, strikingly illustrating how one should react after receiving God's forgiveness through Jesus (Harold and Alexander 2015:6). In addition to realizing who Jesus was, Zacchaeus realized his own long-lost identity as soon as he met Jesus (Gooding 1987:299-300). Zacchaeus was grouped with sinners, the lame, the blind, the prostitutes, and the other so-called expendable members of society, even though his riches and position should have gained him respect in his community and culture (Neyrey 1986:101,108; 1988:78). When Zacchaeus admitted his past sins and vowed to fully atone for his crimes and recompense his victims, his maniacal need to amass wealth ceased, realizing that God's acceptance had given him what he had long sought in vain from wealth (Alana 2002:7). According to Luke, radical wealth renunciation for the benefit of the poor is how a wealthy person can pass through the eye of the needle (Pilgrim 1981:133; Metzger 2007:179). The Zacchaeus story is therefore a summary of the primary themes in the Lukan corpus, particularly the gospel (O' Hanlon 1981:2-9,13,17,19,21-22).

3.5. GRAMMATICAL CONSIDERATIONS

Didomi (I give) and *apodidomi* (I restore) are in the present tense, according to scholars, with questions around whether they are iterative or customary present, which indicates a habitual action of the speaker (Vera 1996:71). An example of an iterative use of the present tense is in Luke 18:12, where a pharisee boasts about habitual practices of fasting and giving i.e. "I fast" (*nesteuo*) and "I tithe" (*apodekateuo*). In Luke 3:9, where John the Baptist warns that "every tree not producing healthy fruit is cut down (*ekkoptetai*) and is thrown (*balletai*) into fire," the futuristic usage is demonstrated (see Veras 1996:71). An iterative present in Zacchaeus' situation would mean the customary practice of donating half of his possessions to the needy, and repaying anyone he may have defrauded four times over. This made him a good man, with the futuristic present suggesting that Zacchaeus didn't do these things in the past, but he intended to do them in the future, which is what he resolved to do as an act of repentance (Veras 1996:71).

Δίδωμι appears three times in the two-volume Lucan corpus: Luke 4:6; Luke 19:8; and Acts 3:6, and grammatically it is parsed as a *verb indicative present active 1st person singular* (BibleWorks). In Luke 4:6 it is translated as a futuristic present ‘I will give you’, the context being Satan’s temptation to Jesus on the mount of temptation. The current form of Luke 19:8 text is open to either translation i.e. ‘I will give you’ or ‘I give you’ and is a subject of much debate as already demonstrated. In Acts 3:6, *δίδωμι* is translated ‘I give to you’, with Peter ministering healing power in the name of Jesus. *Αποδίδωμι* is Luke’s hapax legomenon (in the biblical texts) parsed as verb indicative present active 1st person singular (BibleWorks).

The Lukan use of *δίδωμι* and *ἀποδίδωμι* is best explained by what the BDF (168, 323) calls the ‘futuristic use of the present’, in which, “In confident assertions regarding the future, a vivid realistic present may be used for the future”. Hamm (1988:437) is correct in stating that “When a verse such as Luke 19:8 appears open (at least grammatically) to more than one interpretation, the implications of the author’s own story line and language should be the deciding factor”. In this instance, context seems to inform grammatical usage; at least as far as the natural translation of the indicative present is concerned.

3.5.1. *Δίδωμι* and *ἀποδίδωμι* in Luke 19:8: “Customary presents” or “futuristic presents”?

The debate over the correct interpretation of *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 has been ongoing among interpreters and scholars of the Greek text of Luke. The issue is whether *δίδωμι* and *ἀποδίδωμι* should be understood as customary presents or futuristic presents. The question is not so much how those present tenses are translated as to how they are to be understood. Proponents of the customary present view uphold the vindication theory, which views the words as a defence before a hostile and murmuring crowd. Advocates of the futuristic view, on the other hand, uphold the resolve theory, which views the words as a conversion followed by a commitment to act in a particular manner going forward. Customary presents denote customary behaviour whilst futuristic presents mark a change of attitude. The investigation of Luke 19:8 in its context, however, suggests that *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 are best translated as future presents signifying a resolve marked by a change of attitude into the future.

3.5.2. Comparison of English translations

⁸ But Zacchaeus stood up and said to the Lord, “Look, Lord! Here and now, I give half of my possessions to the poor, and if I have cheated anybody out of anything, I will pay back four times the amount” (NIV; Copyright ©1973, 1978, 1984, 2011).

⁸ And Zacchaeus stood, and said unto the Lord: Behold, Lord, the half of my goods I give to the poor; and if I have taken anything from any man by false accusation, I restore him fourfold” (KJV; Public domain).

⁸ Meanwhile, Zacchaeus stood before the Lord and said, “Sir, from now on I will give half my wealth to the poor, and if I find I have overcharged anyone on his taxes, I will penalize myself by giving him back four times as much!” (TLB)

⁸ Zacchaeus just stood there, a little stunned. He stammered apologetically, “Master, I give away half my income to the poor – and if I’m caught cheating, I pay four times the damages (The Message Bible)

⁸ Zacchaeus stood there and said to the Lord, "Look, half of my possessions, Lord, I will give to the poor; and if I have defrauded anyone of anything, I will pay back four times as much" (NRSV; Copyright © 1989).

⁸ And Zaccheus stopped and said to the Lord, "Behold, Lord, half of my possessions I will give to the poor, and if I have defrauded anyone of anything, I will give back four times as much" (NASB; Copyright © 1977, 1995).

The above picture shows that translators equally border on either of the two interpretive positions: customary presents and futuristic presents.

3.5.3. Discussion

The iterative interpretation of *δίδωμι* and *ἀποδίδωμι* as present tense has Godet as a pioneering figure in his Lukan commentary. Godet (1872) understands *δίδωμι* as referring to a gift given at that moment, once for all, and *ἀποδίδωμι* in the present tense as referring rather to a rule of conduct practiced for a long time. Godet suggests that Zacchaeus' fourfold restitution does not refer to “particular cases of injustice to be

corrected in the future” and is better interpreted as Zacchaeus’ long-standing code of conduct (Godet 1872:217). According to Fitzmyer (1985), *διδωμι* and *ἀποδίδωμι* are difficult to interpret since they are both listed as iterative and futuristic presents by A.T. Robertson in (1914). Zacchaeus goes beyond the demands of the law in accounting for the ‘involuntary injustices’ of his subordinates for which the crowds unfairly blame on him for cheating (*esykophantèsa*) (Godet 1872:218). Jesus demonstrates that Zacchaeus is a true “son of Abraham” despite the position he held that labelled him otherwise. Jesus rather announces salvation to his family rather than forgiveness, whilst Zacchaeus, on the other hand, never begs Jesus’ forgiveness or expresses regret, proving his innocence (Fitzmyer 1985:1220). Following in the footsteps of Godet, Fitzmyer regards Zacchaeus’ wayward ways as unintentional, and his act of restitution as coming from what is acquired and not what he owns (Fitzmyer 1985:1225). According to Ravens (1991:23-24), only when Luke 19:8 “is understood as expressing new intentions” can we employ a futuristic interpretation of *διδωμι* and *ἀποδίδωμι*, presuming his repentance, which is difficult to substantiate. White (1979-80:21) however (cited in Méndez-Moratalla 2001: 234) charges that ‘the traditional translation “I will give” and “since I have defrauded”, which he dates to the third century, is a forced one instead of its more natural translation “I give half” and “If I have defrauded”. Although these scholars cast doubts on the legitimacy of the futuristic present, there are notable contextual considerations which make the futuristic reading a legitimate argument, and a preferred reading that matches the context and tone of the narrative.

Zahn (1913:622) makes a valid claim when he observes that “Zacchaeus could give half of his goods only twice, and then he could surely no longer qualify as rich”. Zahn is right to rebut that giving half-possession as a customary behaviour though quantitatively possible, seems less probable and unsustainable. To say that it was customary behaviour for Satan to give all the kingdoms of the world to Jesus or anyone who bows to him, for that matter, as in Luke 4:6, would be equally absurd, unless if we infer elsewhere that he is “a liar and the father of lies” (John 4:44). Furthermore, it was not customary behaviour for Peter to heal the man at the “gate called beautiful” in Acts 3:6 otherwise there would be repeated miracle healings of the same person. Even if a different person was placed at the gate periodically, it would be far-fetched to suggest

that it was Peter's customary behaviour to heal any/or every lame person who sat by the gate.

To present a grammatical analysis of *δίδωμι* and *ἀποδίδωμι* as the sole argumentative cornerstone and deciding factor in rendering their translation therefore runs short. Méndez-Moratalla (2001:232) indicates that it is right to argue that “the story of Zacchaeus supported both by its context and by Lukan emphasis, is a story of salvation”. It is the story of a penitent sinner face to face with a merciful saviour. Moreover, the vindication story goes against the motif of the ‘table fellowship’ in similar settings i.e., Luke 5:27-32 and Luke 15:1-32, where both contexts signify Jesus’ dining with sinners with a repentance-salvation motif as the end results.

Méndez-Moratalla (2001:268) is therefore correct to conclude that “both *δίδωμι* and *ἀποδίδωμι* should be interpreted as future tenses, as the result of Zacchaeus’ repentance. He decides at that moment that he is going to give half of his possessions to the poor and pay fourfold to those he has deceived. He is not thinking about future deceptions.”

3.5.4. Two major interpretive theories

Two major theories of interpretation exist in the historical interpretation of Luke 19:1-10 pericope, namely vindication theory and resolve theory. The vindication theory interprets *δίδωμι* and *ἀποδίδωμι* as “customary presents”, implying that the words of Zacchaeus in the story signify customary behaviour in the practice of his Jewish faith as a “son of Abraham”. The resolve theory is diametrically opposed to the vindication theory in that it views *δίδωμι* and *ἀποδίδωμι* as “futuristic presents”. This means that that the words of Zacchaeus in the story signify a change of attitude with attendant change of behaviour going forward. This difference in interpretation substantially affects the meaning of the Luke 19:1-10 pericope.

Also employing a linguistic analysis, this study demonstrates that the words of Zacchaeus in Luke 19:1-10 are a radical response to Luke’s radical economic message focused on justice for the poor and marginalized. It is the story of divine justice as a judgement on systems of economic disparity (Myer 2016). *Apodidomi* (and *didomi*), as defined in Luke 19:8, is unquestionably an act of restitution (Harold & Alexander 2015:8).

3.5.5. Vindication theory

Golet (1872) remains a towering figure in pioneering defence/*apologia* theory in the interpretation of Zacchaeus' story. The theory gained traction in the 1960's with the brief exchange of notes by Watson (1965-66:282-285) and Salom's (1966-67:87) in the *Expository Times*. (Richardson (n.d. 1) notes that while many scholars to date espouse the view that these verbs operate as "futuristic presents" thus presenting Luke 19:1-10 as a conversion story, "there are those who interpret these verbs as 'customary presents,' thus arguing that Zacchaeus is here making a defence of himself against the crowd's accusation that he is a sinner".

The '*defence theory*' which is a corollary of the vindication theory is representative of Fitzmyer's view, who argues that "there is no need to understand *διδωμι* as a futurist present, since grammatically it is the same as the Pharisee's present-tense description customary behavio[u]r" (See Fitzmyer 1985:1225). Fitzmyer (1985) regards Luke 19:1-10 as a pronouncement story. Bailey and Green (1995:205) also regards the passage as an example of a pronouncement story, or *chreia* in which, in verses 1-8, a man seeks out Jesus, and in verses 9-10, Jesus declares that Zacchaeus is, in fact, a descendant of Abraham and is thus a member of the Kingdom of God. Jesus summarizes this declaration by saying that the Son of Man's mission is to seek out and save the lost. Fitzmyer's argument is regarded as "the most cogent to date for reading Luke 19:8 as defence rather than resolve" (Hamm 1988:433). Despite being a "sinner," Zacchaeus donates half of his assets to the underprivileged (Fitzmyer 1985:1221). Despite his occupation, which labelled him as anything but an innocent real son of Abraham, White (1990:21) claims that Jesus thinks Zacchaeus is. The crowd has wrongfully accused Zacchaeus of being a sinner, therefore Jesus persuades them to accept him as a son of Abraham (Ravens 1991:27). According to Fitzmyer (1985:1221), Jesus' proclamation of salvation is delivered to the complaining audience to defend Zacchaeus and make it apparent that even someone like him can find salvation. It is not done to demonstrate his own ability to forgive sin or to imply that previous acts of extortion are absolved. Veras (1976:91) argues that Luke 19:8 must be understood as the words of a penitent sinner journeying through a new way of life that demonstrates the same life-transforming power as similar to Jesus-initiated encounters in Luke's gospel, making Fitzmyer's reading incompatible with the Lukan context.

Mitchell (1990) concurs with this 'defence theory' and views *διδωμι* and *ἀποδίδωμι* in Luke 19:8 as "customary presents which serve as defence of Zacchaeus before a condemning crowd". According to Mitchell, the interpretation of Luke 19:8 as a defence is necessary because the Zacchaeus account lacks any clear references to sin and repentance. Mitchell asserts that Zacchaeus is righteous, since Jesus acknowledged his regularly carried out behaviours that were consistent with justification (Mitchell 1990:169). While *hyparchonta* may primarily refer to property, it also appears to apply to income, which can typically be cut in half and be distributed for charitable purposes. On the other hand, as its goal is to show how Zacchaeus differs from the typical toll collector and why, as a rightful heir of Abraham, he is deserving of salvation, *Esykophantesa* in Luke 19:8 need not be seen as a condemnation of Zacchaeus' history (Mitchell 1990:155). Richardson (n.d. 5-6) agrees with both Fitzmyer and Mitchell and argues that Zacchaeus' speech can be interpreted either as "Look, Lord, I'm giving half my goods to the poor and if I have defrauded any one of anything, I'm restoring it fourfold," (quoting Hamm 1988:431-432) or as "My customary practice is to give half of what I have to the poor, etc." (citing Green 1997: 671-672).

Johnson views the Zacchaeus narrative as a deceptive example of appearance, where everything about the tax collector would suggest corruption, but where, in fact, he is good in his deeds and is, as Jesus states, a "child of Abraham" (Johnson 1991:287). Johnson had previously believed that Zacchaeus' spontaneous conversion, in which he gave half of his possessions to the poor and made up for those he had cheated four times, was evidence that Luke 19:1-10 was a conversion narrative (Johnson 1977:145). According to Johnson, the Greek translation of Zacchaeus' conditional statement in the "if" clause "*ei tinos ti esykophantesa*," (if I have defrauded anyone) does not imply that he had committed extortion but rather means "if I discover I have."

The 'vindication theory' is thus a 'defence theory' seeking to project Zacchaeus as an upright Jew deserving of salvation because of his customary practice which is consistent with the Jewish law. It shall be noted, however, that the idea that Zacchaeus was good is irreconcilable with the structural, thematic, and narrative coherence of Luke's Gospel (Vera 1996:70).

3.5.6. Resolve theory

Luke 19:8 is a key text for scholars like Drury (1976:72); Talbert (1986:176); Kariamadam (1985: 56) who view Luke 19:1-10 as essentially a conversion story. The narrative is driven by repentance and is divided between a before and after in which Zacchaeus is depicted in Luke 19:8 as a rejected sinner before receiving salvation and becoming a son once more (Drury 1976:72; Veras 1996:82). According to Kariamadam (1985:55), 19:8 serves as the focal point of the narrative's body. Kariamadam (1985) extensively points to structural similarities between Luke 19:1-10; Luke 5:17-32, 5:27-32, 7:36-50, and Luke 18:35-43. For Mitchell (1990:161), any similarities with Levi's narrative and chapter 15 are negated by Zachaeus's account's omission of specific references to table fellowship and metanoia. Rather, Mitchell (1990:158) views the story as a pronouncement story. Mitchell (1990:154) however acknowledges that viewing *δίδωμι* and *ἀποδίδωμι* as futuristic presents represents a favourite consensus view among scholars. Drury (1976:11) views Luke 19:1-10 as a conversion story, pointing out that conversions occur in both Luke's parables and narrative sections. He contends that that Luke's account of Christianity's development, which hinges on conversions, is what gave Christianity its existence. Ravens (1991:28-31) interprets Luke's symbolic use of names to reinforce the idea that Zacchaeus is what his name means – an upright man – by constructing a *tryptich* with Simon the Pharisee (7:40–43,44) and Lazarus (16:20–23,24,25). Grammarians like A.T. Robertson, Nigel Turner, and Maximilian Zerwick all discuss how the present tense is used futuristically in the New Testament (Vera 1996:75). The futuristic present is shocking and attention grabbing, asserting rather than merely speculating and imparting a sense of certainty (Robertson 1914:870). Luke 19:8 makes use of the futuristic present to make bold claims intended to grab attention and with immediate fulfilment in mind (Turner 1963:63). Due to the impact of Aramaic, which frequently uses the (present) participle, especially for the near future, the present very frequently represents the imminent future (Zerwick 1963:93).⁷² The present tenses of 19:8 may have been influenced by Aramaic, according to Watson (1965[66]:286), who calls for consideration to investigate this option and hypothesises an underlying Aramaic original, where the

⁷² Zerwick (1988:258) parses *didomi* as “pres. ref. fut., meaning “I will give, I am determined to give. In keeping with the method statement at the beginning of the volume, which states that a word's explanation (or verb in the same tense) is not repeated in the two verses that follow, Zerwick translates *apodidomi* as “give back, restore.” (See Zerwick 1988: xxxvi, 258).

future tense is expressed by the participle. The strongest indication of an underlying Aramaic source⁷³ is the use of direct speaking in Luke 19:8 (Watson 1965:285). The meanings of the Greek words *hyparchonton* and *esykophantesa* are crucial for understanding how to interpret the passage in 19:8 as resolve, as Alfred Plummer, Nigel Watson, and Dennis Hamm have all noted.⁷⁴

Hamm (1988) believes that the words of Zacchaeus in Luke *δίδωμι* and *ἀποδίδωμι* 19:8 mark a resolve, thus rendering them as “futuristic presents”. He argues that “giving half of your possession” can only be a quantitative possibility and never a customary behaviour. According to Hamm (1988:434), “the most natural understanding of *ἀποδίδωμι* would take the statement as a resolve to fraud committed in the past”.

Drawing on the centuries’ old patristic tradition, Hamm (1988:431) argues that the traditional interpretation, from the patristic era down through most modern commentators, has understood Luke 19:8 as the vivid expression of a convert’s resolve. This might best be captured in the contemporary colloquial English in this way: ‘Look, Lord, I’m giving half my goods and if I have defrauded any one of anything, I’m restoring it fourfold’.

The halving of one’s possessions continually would be a numeric possibility for a while, but this would hardly make sense as a description of customary conduct. According to Hamm, even if *hyparchonta* were prolonged to include income, its basic meaning remains property or possessions (Hamm 1988:434). There is no linguistic basis to translate *hyparchonta* as “income” instead of “possessions to justify habitual halving (ibid). No toll collector could possibly uphold his moral behaviour while also acknowledging that he occasionally engaged in extortion; this is both inconsistent and absurd⁷⁵ (Hamm 1991:249).

⁷³ Godet (1872:216) also believed that Luke’s source language was Aramaic, though he does not apply this hypothesis the same way that Watson does.

⁷⁴ The common definition of *hyparchonton* is “possessions” or “property,” according to Alfred Plummer, Nigel Watson, and Dennis Hamm, whilst *sykophanteo*, according to Kariamadam (1985:35), only appears twice in the New Testament: here in Luke 19:8 and in Luke 3:14, when John the Baptist counsels tax collectors to live on their salaries and not defraud anybody.

⁷⁵ This is Hamm’s response to Mitchell’s (1990:156) claim to ‘inadvertent extortion’ by Zacchaeus. The absurdity of argument is further noted by Veras (1996:106) when he points that the defence interpretation rips the Zacchaeus story out of its narrative context if it is seen as the good man’s

Whilst Johnson, a defence theory proponent, acknowledges that *esykophantesa* refers to intentional extortion in his interpretation of 19:8, he casts doubts on whether Zacchaeus committed fraud at all, a fact that Fitzmyer⁷⁶ (1985:1221) also questions. There is no doubt about the presence of past malpractices because of the indicative *ei* (as opposed to the subjunctive *ean*) (Plummer 1896:435). Therefore, in this case, the “if” clause expands rather than limits the definition of extortion (Marshall 1978:698). The clause describing the reasons for the fourfold customary restoration cannot be completely contrary to fact, making the fact of the extortion a reality if the restoring happens (Veras 1996:77). The grumble of 19:7 must also be true if 19:8 is a repentant sinner’s resolution (Veras 1996:85). The structure of the story favours Luke 19:8 as a penitential confession stemming from the crowd’s legitimate protest against Jesus’s association with a known fraudster, with Jesus equally challenging the crowd to attitudinal conversion on who is worthy of salvation. Otherwise, Jesus would be denying the legitimate cry of the crowd, making Zacchaeus’ to defend both himself and Jesus; this is an untenable proposition by the vindication theorists like Mitchell⁷⁷ (see VeraS 1996:86). This understanding would imply that the crowd is wrong in thinking that Jesus is on a (salvific mission) to the house of a sinner (Veras 1996:87). The defence theory is in stark contrast to the gospel narrative, disjointing the story’s plot and position in that narrative, thus weakening its significance (Veras 1996:87). Luke 19:8 must be an act of repentance to fit harmoniously into its Lukan context, according to comparisons of 19:1-10 with other passages in Luke’s gospel and an analysis of Luke’s theme of salvation (Veras 1996:87). This demonstrates the contradiction in viewing Zacchaeus as a man who upholds the letter of the law whilst consistently defying the same law (Plummer 1896:435; Watson 1965-66: 283). The verb *esykophantêsa* “I cheated” in the aorist tense undermines Godet, and Fitzmyer’s claim that it is odd for a remorseful sinner to speak of injustices he will perpetrate in the future (Godet 1872:217; Fitzmyer 1985:122, quoted in Veras 1996:78). Zacchaeus is

justification in which, Zacchaeus is a tax collector, but he is not a sinner like the Lost Son; he is rich, but unlike other affluent men in Luke, he is not devoted to his riches; and Jesus associates with Zacchaeus not to bring repentance to a sinner, but to defend a decent man.

⁷⁶ The conditional clause, according to Fitzmyer, demonstrates little more than the possibility that Zacchaeus engaged in extortion.

⁷⁷ Mitchell claims that by quickly defending Zacchaeus and absolving him of all wrongdoing, Jesus’ proclamation neutralises the crowd’s criticism and serves two aims.

boasting in 19:8 if he is not repenting⁷⁸ (Plummer 1896:435; Marshall 1978:698; Hamm 1988:435).

Nowhere else in Luke is such a defence considered a legitimate attitude in answer to Jesus' invitation. Rather, self-justification is particularly forewarned against in discourse and parables, making 19:8 an admission of sin, which, like previous such admissions in Luke, is met by the redemptive power of Jesus (Vera 1996:94). Luke's Travel Narrative is introduced by the idea of humility in Luke 9:46–48, and the evangelist "intentionally structured this episode" (19:1–10) at the end of the Travel Narrative in accordance with this theme (Kariamadam 1985:67-68, 73). According to Luke's gospel, acknowledging one's sinfulness rather than defending oneself is the proper course of action (Veras 1996:93). Luke has previously treated tax collectors as penitent sinners and it seems improbable that Luke would depict Zacchaeus as a good man defending himself in Luke 19:8 against his own stereotype. Consequently, Zacchaeus' story is not only a continuation of Luke's subject but also most likely its climax (Veras 1996:102). The links between repentance and Jesus' death and resurrection in the two volumes of Luke, makes Zacchaeus' story in Luke 19:8 to be a resolution of a repentant sinner in its narrative context (Veras 1996:105). Luke juxtaposes the conversion of Zacchaeus after the prediction of the passion and resurrection. This is in anticipation of the post-passion notion of repentance and forgiveness of sins with the opening of the eyes (salvation) of the blind man in the preceding pericope (Lk 18:31-34) (Kariamadam 1985:72). This view of Zacchaeus accords with the themes of repentance and forgiveness Luke has established in his account up to this point. It also emphasizes these elements by acting as a narrative climax (O' Hanlon 1981:10-11). Thus, the pericope is epitomizing and archetypal in nature (Loewe 1974:331). According to Hamm, Luke's "audience was well-prepared to understand the story of Zacchaeus as a climactic example of the same kind of *metanoia*" due to the immediate setting as well as the parallelism of 19:1–10 with 5:27–32 and 15:1-32.

⁷⁸ Fitzmyer (1978:1221) contends that because he is defending himself rather than expressing himself, he is not bragging like the Pharisee in 18:11-12. According to Mitchell (1990:157) the defence is necessary given the murmuring of the crowd.

Whilst acknowledging that “the use of the present active indicative tenses, as in the case of *δίδωμι* and *ἀποδίδωμι*, allows for both an iterative and a future translation”; Méndez-Moratalla (2001:260) contends that “the study of the context of these verbs is so important”. The question is “” not so much how those present tenses are translated as how they are to be understood” (see Hamm 1988:431). Respecting Lukan integrity serves as a reminder that understanding difficult sections does not determine how we interpret the gospels; rather, it influences how we interpret passages that have linguistic issues (Veras 1996:108).

Méndez-Moratalla (2001:260) argues that “The established context of the story requires a future present as the best reading of Zacchaeus’ intentions; a present resolution showing his repentance and inclusion in the Kingdom of God”. Assuming the futuristic present stance of *δίδωμι* and *ἀποδίδωμι*, Méndez-Moratalla (2001:260) subsequently translates Luke 19:8 as “Look, half of my possessions Lord, I will give to the poor; and if I have defrauded anyone of anything, I will pay back four times as much”. The Zacchaeus pericope appears to be best understood when read critically within the context of the journey narrative. Within this, Jesus comes to seek and call sinners to repentance as well as to proclaim the salvation of the impoverished and the downtrodden (Alana 2002:10).

The resolve theory is ultimately a conversion theory which sees Zacchaeus as a repentant fraudster who at the point of conversion commits to making restitution out of his ill-gotten wealth to effect justice for and reconciliation with his victims. Boesak (2008:641) views these to be “radical consequences of genuine reconciliation: transformation, restoration, justice”. Salvation by turning away from one’s sins, is therefore exemplified by Zacchaeus’ encounter with Jesus (Alana 2002:8).

3.6. SUMMARY AND CONCLUSION

This Chapter has evaluated the interpretive history of Luke 19:1-10 Zacchaeus pericope. It has demarcated two leading views from the interpretation history namely, traditional rendering as a conversion/salvation story, and the opposition reading as an apologia/defence story. The chapter has analysed two important words, that is, *δίδωμι*

and *ἀποδίδωμι* in Luke 19:8 as the interpretive nexus leading to either a defence theory or conversion theory in the history of interpretation. The chapter looked at the debate on whether *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 should be interpreted as customary presents or futuristic by the Greek interpreters of the Lukan text. Depending on one's interpretive lenses, the words *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 can be interpreted as customary presents, supporting the vindication theory which views the words as a defence. Alternatively, they can be interpreted as futuristic presents which upholds the resolve theory that views the words as signalling conversion followed by a commitment to act in a particular manner going forward. The contextual understanding of the words determines the appropriate rendering of the meaning in each context. Having looked at the Lukan corpus, grammatical analysis, and intra-inter contexts; the author is convinced that *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 are best translated as future presents which signify a resolve marked by a change of attitude and behaviour. When *δίδωμι* and *ἀποδίδωμι* in Luke 19:8 are read in the context of the third Gospel, with all its linguistic, structural, and thematic implications, and not in isolation, they are clearly futuristic. They lend an iterative or futuristic use of the Greek present fading into the background and favour an interpretation in which Zacchaeus is a repentant sinner resolving to change (Veras 1996:107). Key terms like *hyparchonton*, *esykophantesa*, *soteria*, and *apoloios* would need to be redefined if Zacchaeus were a righteous man in the text. Thus, viewing Luke 19:8 as the resolve of a repentant sinner retains and emphasizes the structural, thematic, and narrative integrity of Luke's gospel (Veras 1996:107-108). The context of the story as placed within the travel narrative of the Lukan gospel has served as the backdrop for the interpretive thrust. Lastly, the chapter has highlighted the radicality of Zacchaeus' response in Luke 19:1-10 within the overall Lukan message of "good news to the poor" and "wealth renunciation" and locate its place in the Lukan gospel narrative.

Chapter 4

Roman imperial economy

To plunder, butcher, steal, these things they misname empire: they make a desolation and they call it Peace (Calgacus, the chieftain of the Caledonian confederacy; c. 83-84 AD; see Rutherford 2010)

4.1. INTRODUCTION

The vastness⁷⁹ of the Roman empire, and its timespan, coupled with the nature of the sources available makes analysing the Roman imperial economy an ambitious project fraught with difficulties. By the first century AD, an estimated 50 to 60 million individuals from a broad range of religious affiliations, languages, ethnicities, and social classes may have resided in the Roman Empire. Moreover, the various areas of the Roman Empire would have experienced the Roman Empire and its beginnings in distinct ways (Erskine 2010:50). It is thus crucial to avoid emphasizing homogeneity while discussing Romanness to preserve the local context (Erskine 2010:62). The distinct perspective of the provinces is best illustrated through archaeological and epigraphic evidence. The perspective of the centre however is best illustrated through literary works such as the works of Titus Aurelianus, Lucius Julius Claudius, and the works of Pliny the Younger (Erskine 2010:63). It can be difficult to summarize the Roman Empire economy because it's often driven by elite ideology, focused on what 'ought' rather than what 'actually' happened, which means more research is needed (Shim 2016:49).

Archaeological research in the Roman West focuses on the extent of Roman imperial influence and the legitimacy of the notion of 'romanisation'. The West is seen as tribal and identified primarily through archaeological evidence, while the East is seen as more urbanized. This has attracted the attention of ancient historians and classicalists, particularly those interested in the concept of what it was like to be Greek within the Roman Empire (Erskine 2010:50). The ancient Mediterranean world was traditionally divided into two major regions by scholars: the Hellenistic and Roman civilizations, with the civilizations of Egypt and the Near East, thus forming a sub-region of the Greek-Roman economy (Manning & Morris 2005:1). One must therefore be cautious of

⁷⁹ The entire Roman Empire encompassed about 30 nations and covered more than 3.5m sq. km, with an estimated population of 55-65m, and extended east and north to the Black, Red, and British seas (see Frier 2000:787-816).

popular nomenclatures treating the Roman empire as a monolithic entity. Roman history can be subdivided into the regal period, the republic period, and the imperial period with the preceding principate.⁸⁰

The economic industries prevalent within the Roman Empire, as depicted in the narrative of the Lukan period, correspond to the four main industrial sectors: 'agriculture and land, non-agricultural industry, commerce and trade, and money and finance' (Shim 2016:77). A combination of local, regional, and global commerce characterized the Roman economy, as demonstrated by archaeological evidence⁸¹ (Harris 2008:710-740). Pliny suggests that since it was so ubiquitous over the entire Mediterranean, long-distance trade⁸² was not a unique occurrence (Pliny the Elder, *Nat.* 11.118; see Rogers 2019:82). Roman and provincial nobles, as well as other local nobility and wealthy individuals, submitted requests for various luxurious items from outside the metropolis (Shim 2016:82). These were necessary to satisfy their lavish appetites and to embellish the architecture of the Roman Empire and other major and minor imperial cities, Roman imperial families,

The Roman Empire's economy was basically one big open economy with a lot of different regions and time periods, made up of different ethnic-political groups that were forced together after Rome was conquered or formed an alliance (Shim 2016:50). Such political, social, and actual market economies were all combined to form the Roman economy (Mattingly 2006:295). Unified political conditions, the expansion of communication networks, and the transformation of the Roman Empire all contributed to economic integration (Shim 2016:88). With the same factors such as income, interest rates and wheat prices in many regions, the Roman economy achieved integration and efficiency in labour, credit and commodity markets (Temin 2001; 2006; 2012; Kessler & Temin 2008). The study of the structure and performance of the Greco-Roman economy must therefore consider a variety of political, cultural, and social elements as well as the demographic characteristics (see North 1981:3). The *Institutional School of Sociology and Economics* emphasizes the interdependent and

⁸⁰ The principate is the transitional period between the Republic and Empire.

⁸¹ A pottery workshop in southwest France had a kiln capable of producing 3000 pots daily, likely for large-scale distribution beyond surrounding areas' supply (see Peacock 1982:114-128).

⁸² Rome imported other goods from beyond imperial borders like ivory from India and the coast of eastern Africa, silk from China, amber and furs from the Baltic (Dunstan 2011:339).

influential nature of socio-cultural organization and economy (see North 1990; Groenewegen *et al.* 2010, *emphasis mine*).

4.1.1. Modernist and primitivist debate

The historical socioeconomic evaluation of natural resources and the Roman world is primarily concerned with the way in which land and resources were utilized. This was either through hierarchical state control in provinces or through market forces, within the Roman economy (or any other economic system) (Zuiderhoek 2015:4). For more than a century, the debate between modernism and primitivism has driven research into economic history, since neither school of thought allows for a comprehensive knowledge of Greco-Roman economic life (Ghio 2015:2). Modernists see it as a precursor to a modern economy and highly respect it for its economic acumen and potential for advancement. However, primitivists see the ancient economy as essentially a household economy that was part of the early phases of economic growth (Shim 2016:8).

The primitive economy was qualitatively and quantitatively different from the modern economy and was primarily composed of self-sufficient households, regardless of size. Primitivists claimed that this ancient economy, should receive a low overall rating as it was in its early stages and did not provide a stimulus for subsequent development (Shim 2016:54). According to Bücher's (1893, 1901) three-stage theory, the ancient and modern economies were qualitatively different because agriculture was primarily used for internal consumption, trade was non-existent, technology was archaic. Capital formation was also lacking, and slavery was an economic development that was brave but cautious. Primitivism's central argument is that modern economic models cannot be used to study the ancient world.

In contrast, modernism puts the late medieval and early modern periods in line with the early capitalist and market economy, Modernists argue that the old economy is not too different or too distant from the modern economy, since the two differ mainly in size (Shim 2016:53). For instance, Meyer (1895) had earlier maintained that the same methodology and terminology should be used for examining ancient and contemporary economies, claiming that these are analogous in that they both have similar industrial processes. Meyer (1895:118-119) argues that the economic development of Europe

during the 14th to 16th centuries BCE is largely comparable to the economic development of Ancient Greece during the 7th to 5th centuries BCE. However, the Roman imperial world's economic performance shows that its market economy was more advanced than that of the Middle Ages (Temin 2006:133-151). It is widely accepted that the Roman Empire was more varied and dynamic than previously thought. This strongly implies that, in the context of the primitivism-modernism controversy, the Roman Empire's economy was far more advanced in pre-modern terms (Shim 2016:66). In contrast to the notion of an anaemic backward agrarian economy, the economic performance of the Roman Empire was dynamic and heterogeneous (Shim 2016:67).

Modernists consider the ancient economy to have been a dynamic one, with well-developed markets in a variety of industrial sectors, and high potential for future expansion. This necessitated the application of traditional methodological and conceptual analysis of modern economics. This encompassed mathematical modelling, and statistical analysis using economic indicators and concepts (gross domestic product (GDP), purchasing power index (PIE), prices, monetary demand, etc.) (Shim 2016:53).

Weber (1904) accepted the economic analysis founded on capitalist principles that were associated with modernists, while maintaining a primitivist strong belief in the structural deficiencies that had affected trade and business in the past. Weber rejects the manorial structure as a criterion for the definition of Roman agriculture. Nevertheless, he acknowledges that the major turning points in Roman history were often related to the economic realm, particularly in the sphere of agriculture. He proposes further that the development of the Greek-Roman economy was largely determined by the political and military forces, with non-economic factors influencing economic factors (see Weber 1904; 1909). Pearson (1957:8,10) views Weber's approach as a middle-ground "military-political approach". Weber's analysis of the socio-political relationship between ancient and medieval cities also reveals a distinct structural economic distinction between the two. The ancient city was one of

consumption⁸³ that obtained its resources from its surrounding area and then engaged in a relatively short-term commercial activity (Weber 1922:1219). Thus, the practise, theory, and attitudes of a mighty metropolis ruling a far-off land make up this Roman imperialism (Said 1994:9). Ancient cities were preoccupied with food security and not economic activity, with the economy being subservient to politics in Greek city states (Hasebroek 1931). The surplus products from individual breeding were gathered for consumption in ancient big cities with centralized governments and ruling classes (Bücher 1968:371). Rural communities generate surplus production in a range of industries, particularly in the agriculture sector. They remit taxes and rent payments to consumer cities that depend on this production without exchanging any tangible commodities (Sombart 1916:142-143). The focus on Roman manufacturing capacity suggests that the primary function of a city within the Roman imperial economy may have been to consume rather than to produce. This was due to the Roman manufacturing capacity being extremely limited and underdeveloped, with a workforce of less than 30 people and a minimal level of labour division (Peacock 1982:1-11; 90-128).

4.1.2. Substantivism-formalism debate

Polanyi argued for a new approach to the analysis of ancient economies, challenging the notion that a market-based economy was the standard of human economic development and history. He contextualized modern capitalism based on the power of autonomous markets as a new economic system that had only recently emerged and was only applicable to certain societies around the world (Polanyi 1944; 1957; 1968). Polanyi argued that the market's role in economic exchange is relatively limited, and that distribution and reciprocity play a central role in the history of economic exchange. The economic conduct of individuals in human economic transactions has generally been influenced by other social relationships and cultural norms rather than the purely depersonalized and inflexible rules of markets motivated by the pursuit of profit. This has contributed to the integration of the economy into social structures rather than its separation from them (Shim 2016:55). Consistent with Weber, Polanyi distinguishes

⁸³ Other scholars dispute this consumer-city notion. Wilson (2002:231-273), for example, demonstrates the textile manufacturing in Timgad in Algeria, and fish-salt produce in Sabratha in Libya. DeLaine (1997; 2000) demonstrates that construction and service industries were there in Rome and Ostia. The considerable production capacity is visible in Pompeii based on archaeological evidence (Laurence 1990:71-90; Parkins 1997: 83-111).

between economic substantivism, which sees economics as an essential part of society, and formalism, which sees it as separate from other social structures (Shim 2016:65).

Economic substantivism considers sociological concepts such as status, social organization, culture, and faith and analyses ancient economies in relation to them as it regards them as part of sociological research rather than as a subfield of economics. *Economic formalism* however utilises modern developments in economic theory, such as Gross Domestic Product (GDP), income distribution and trade data, in comparison to the classical economy. (Shim 2016:56). Carney (1975) draws on Polanyi's arguments and economic anthropology, as well as some modern theories such as monetary theory and markets, to construct historical models that capture both the static and dynamic nature of ancient economies.

Finley (1985) developed a radically different view of pre-modern economies which was supported by Weber and Polanyi's claim that they were qualitatively distinct from modern capitalism. This approach was based on economic social embeddedness, out of frustration with the anachronistic modernizing approach to economic history (see Zuiderhoek 2015:6). Finley's analysis of the effects of status anxiety on the ancient economy focuses on status rather than class (Shim 2016:57-58). Finley draws on the words of Cicero regarding the proper occupations and economic practices for the free, when he (Cicero) argues that some profit-making activities are typically associated with deceit and exploitation. Cicero extolls the virtues of agriculture as the most suitable profession (Cicero, *Off.* 1.150-151; see Finley 1985:35-61). He further argues that certain economic prospects are subject to the criteria of reputation and integrity, whereas status considerations have impeded the advancement of labour, finance, land, commerce and technology.

In the distribution of goods, reciprocity and the allocation of power were as important as commerce, as elites owned and used the land to generate a regular income. This allowed them to participate in political life in the cities they governed and to lead a life that was consistent with their position and status, despite the existence of both local and regional markets (Zuiderhoek 2015:7).

Greco-Roman banking included a wide range of occupations, such as money changers and professional bankers (*nummularii*, and *cofactor argentaria*), who provided credit to auction participants (Andreau 1999:30-63). It appears that the Roman imperial economy had achieved a high degree of commercialization and currency integration (Howgego 1992:1-31; 1994:5-21). It is also noteworthy that the Roman currency system developed to the extent that it allowed for small-scale exchange within a local marketplace, which has led some historians to suggest that money played a significant role in the development of the market economy (see Mattingly 2006:296; De Ligt 1993; Frayn 1993). The interregional system of finance supported maritime commerce by lending money to one port and redeeming it in another (Rathbone 1991:318-330). Moreover, the use of money served as the unit of account for describing and determining the worth of non-monetary transactions (Dig. 45.1.122.1; see Shim 2019:84). All this was proof that there were some financial activities that took place outside of the local sphere during the Roman period.

Harris (1993:9) however argues that the Roman imperial economy was a complex amalgamation of various interdependent economic entities that were confined to various regions of the empire. Natural, climatic and demographic factors, as well as various socio-political trends and the benefits of imperial policies seem to have influenced economic performance in the West, East, Roman Egypt and frontier regions (Scheidel 2007:24-27). Nevertheless, despite their dominance of the inhabited world, the Roman economy was not homogeneous because they did not have the authority to enact economic regulations that could be uniformly applied throughout the entire Roman Empire (Scheffler 2011:117-118). Consequently, it is simplistic to distinguish between a policy that applied at a particular time and place and then to apply that policy to the entire ancient world or Empire (Scheffler 2011:117-118). Thus, wealth was seen as something that exists only to be wasted in an ostentatious display of immense wealth and grandeur, and the elites were not expected to care about money as their income was virtually guaranteed (Kautsky 1982:188).

Finley (1985) argued that the analysis of the ancient economy could not be conducted through the lens of modern neo-classical economics, which was primarily a theory intended to explain (or at least justify) capitalism. The dominant mentality and economic behaviour of the ancient economy were however significantly different from

those of capitalist market economies. According to Finley, labour as a unit of production did not exist in the past, and neither the labour market in the contemporary sense nor the financial market in the form of capital goods ever truly developed. Land was not regarded as a commodity in the traditional sense, nor did there exist any professional terms for land sellers and property sellers in either Greek or Latin. Finley therefore argued that the non-citizens were prohibited from owning land or property in the Greek poleis. The high moral stigma attached to Greek or Roman citizens who speculated on the ancestral inheritance that was to be preserved for future generations consequently prevented the development of a suitable market for land (Finley 1981:71-73, 1985:117-120).

Agriculture, despite its difficulties in being quantified, played the most prominent role in the Roman economic industrial system (Shim 2016:77). As Rome was a tributary empire, land distribution among the elite of the empire was largely determined by imperial power and tribute collection, with the influence of the market being minimal, if any (Bang 2008:93-110). The Roman Empire and its ruling class perpetuated a system of taxation through the exaction of import duties and other fraudulent practices. This enriched a select elite class, to the detriment of traders and the population of the provinces in general⁸⁴ (Bang 2008:93-110). Provincial communities⁸⁵ were provided with usurious loans by the senators and the knights which enabled them to pay taxes, which in the event of non-repayment resulted in domestic land forfeiture to the debtor community (as was traditional). Alternatively, investment in provincial land was done from the proceeds of exaction and corruption during the reign of the provincial governor (Bang 2008:93-110).

In cases where there were no heirs to the property, or where the property belonged to a person sentenced to death, the property was generally forfeited, and there were other methods of forcibly taking property⁸⁶ from its owners (Tacoma 2015:80). A widespread social contract existed, probably based on the threat of confiscation if the Emperor's

⁸⁴ The ability of tax revenue to be invested in land resulted in the formation of the major land-owning families in Egypt, particularly the family of the Flavius Apiones in the nome of Oxyrrhynchite (see Banaji 2001-2007).

⁸⁵ In provincial land, taxation was paid by the landowner or tenant, usually as a tax on fruits (product of exploitation), whereas in Italian land, exploitation was tax-free (see Jakab 2015:121).

⁸⁶ Confiscation is recorded as the primary mode of property acquisition during the Julio-Claudian period (see Millar 1977:163–74).

demands were not met. Through this, the Emperor received inheritances, legacies and was often mentioned in the wills of non-imperial relatives⁸⁷ (see Verboven 2002; Millar 1977:153-8). The prospect of such confiscation placed significant social pressure on wealthy landlords to relinquish at least a portion of their lands to the Emperor (Champlin 1991:150-152). By emphasizing structure over performance, Finley exaggerates the psychological and institutional uniformity of the ancient world throughout time and space. He uses his model of the classical Greek polis' economic system as a basis for the Roman economy. He meanwhile searches for the origins of modern industrial capitalist economy, with its continued intense growth in the commercial metropolitans and growing free markets of late medieval and early modern Europe (Zuiderhoek 2015:9).

4.1.3. New institutional economics

The New Institutional Economics (NIE) posits that there exist covert expenses related to economic activity, such as search and enforcement costs, bargaining and decision costs, and policing and enforcement costs. These serve as crucial descriptors and predictors of real-world economic outcomes, a factor ignored by classical economic models (Zuiderhoek 2013:11; see Zuiderhoek 2015). Every societal construct⁸⁸ is governed by a set of regulations, both explicit and implicit, that have a profound impact on the functioning of its institutions, the conduct of its populace, and the manner in which they choose to lead their lives within its boundaries (North 1990). The acknowledgement by NIE of the considerable influence of broader factors such as culture, political economy, social and legal standards, among others, in the process of economic development is noteworthy.

The NIE endeavours to offer novel perspectives on socioeconomic interactions by transcending the primitivist/modernist discourse and integrating various methodologies (Keddie 2019:7). For example, recent studies in the field of ancient economics have utilized the NIE methodology to demonstrate the institutional constraints that dictate the actions of individuals, regardless of their social status (Morris 2002; Cascio 2006;

⁸⁷ The enormous amount of 1400 million sesterces claimed by Augustus as heir or legatee suggests that a much wider group of people than just his close associates left him a portion of their riches over the final twenty years of his life (Suetonius, *Aug.* 101; see Millar 1977:155).

⁸⁸ North (1990) refers to these as the 'rules of the game' that determine how the 'players of the game' operates.

Scheidel *et al.* 2007; Kehoe 2015; Zuiderhoek 2015; Keddie 2019). Kehoe (2007:29-52) and Bang (2009) have successfully made an insightful preliminary implementation of NIE to the study of the ancient economy. Gardner (2003) endeavoured to employ the theoretical framework of the NIE in his inquiry into early Roman Palestine.

The over-emphasis of market activity by the NIE approach is perhaps its greatest weakness⁸⁹. In certain circumstances, the allocation of resources through social organizations may be deemed economically feasible in lieu of transaction costs and institutional efficiency. This may be preferable, rather than relying solely on market prices as emphasized by the neoclassical emphasize of NIE (see Coase 1937; North 1977; Bang 2009:204). Despite taking institutional factors into consideration, there exists a sense of doubt regarding the feasibility of an economy and economic history framework that is exclusively fixated on market mechanisms and optimizing efficiency⁹⁰ (North 2005:122).

The NIE seemingly infuses a ‘makeover of efficiency’⁹¹ into all pre-modern establishments as it strives to integrate institutional analysis into the domain of economic history (Ogilvie 2007). The recent work of Keddie⁹² (2019) is a classic example of this attempt to ‘glorify’ even as trite, institutions of oppression, as that of imperial Rome. If we privilege modern categories like market forces and institutions in ancient economic studies, as NIE does, then we can expect the same contemporary market economic results that favours the elite albeit moderately; highly stratified economies that benefit the elite and are inaccessible to the marginal poor. It is imprudent to disregard the perspective of the poor in Lukan studies, no matter whose statistics⁹³ or social location in the urban-rural continuum one uses (King 2019:179).

4.2. AUGUSTAN IMPERIAL PROJECT

⁸⁹ Blanton (2017), Hollander (2017), and Blanton and Hollander (2019) have encouraged the use of some NIE findings in the study of the New Testament with cautious warning to market-activity over-emphasise (see Keddie 2019:11).

⁹⁰ North (1990) argues that the market itself is an institution run by limited human beings, with finite knowledge and thinking capacity, making it impossible to have market decisions that are always efficient and successful.

⁹¹ Ogilvie (2007:654) offers a stern critique of this tendency, also reflected in Bang (2009:4).

⁹² Keddie acknowledges that the institutional reforms of imperial Rome, in the main, benefitted the elite, yet absurdly claims that this happened without any impact on the nonelite poor and marginalized.

⁹³ The poor represents the majority of Luke’s social location, as low as 55%, and as high as 82% (King 2019:179).

The founding period of the Roman Empire under the imperial reign of Augustus, with its associated territorial expansion is hinted at by Luke. It is an important aspect in understanding life in the second temple Roman Palestine generally and the Palestinian economy particularly as shaped by the broader Roman imperial economic policy. This warrants an investigation into the Augustan Roman imperial project, its expansion, and territorial enforcers and how it influenced the economies of the local occupied people. The fortunes of the elites and the fate of the poor will be underscored.

The Roman Empire is widely regarded as the most influential empire in history, extending throughout Western civilization, encompassing all aspects of politics and law, as well as military organization and strategy. It culminated in the conquest, coercion, and assimilation of the entire Mediterranean region. Rome formed an empire that extended from the shores of Britain in the north-to-North Africa in the east, and from Portugal in the west to the Persian Gulf, although the Romans were originally a small kingdom located on the Italian peninsula (Pollok 2017:1). It is described as the creation of a new system of epistemology, where the knowledge that had previously been controlled by the political elite in Rome was now spread out and interconnected all over the Mediterranean (Wallace-Hadrill 2005:81).

Romanization was either pleasurable or aesthetically pleasing presenting both pressure and attraction thus contributing to the desire to participate in the realm, as the offerings of baths and wine appealed to the senses without the need for introduction (MacMullen 2000:134). However, the final years of the Roman Republic saw political instability as military leaders consolidated their power, making it increasingly difficult for the Senate to control the situation (McCrane 2008:727)⁹⁴. The achievements of the Roman military were having a ripple effect on society, culture, and economics. Rome began to govern the regions that had been captured by the legions, forging connections between previously isolated peoples and regions across the Mediterranean, through conquest, and creating a new class of connected professionals who were accumulating new sources of wealth (McCrane 2008:727-728).

⁹⁴ The turning point came in 44 BC, when Julius Caesar broke some of the most sacred rules of the ancient system, transforming Rome from a republic to an empire, both politically and militarily (see McCrane 2008:727).

Augustus⁹⁵ is credited for bringing peace and prosperity to the Roman republic which he cunningly turned from a republic to an empire with himself as the chief ruler at the helm. He ended a lengthy period of political upheaval marked by civil war and power jostling which saw his uncle and adopted father, Julius Caesar assassinated. Augustus' two main goals throughout his reign were to secure power first and then establish peace and stability (see Jeffries 2006). Octavian restored peace after avenging Julius Caesar's death at the Battle of Philippi in 42 BC, and Cassius' and Brutus' deaths at the Battle of Actium in 31 BC. This brought an end to Rome's civil wars, afterwards returning control of the newly restored *res publica* to the Senate who promptly did the sensible thing and commissioned him to take care of it⁹⁶ (Severy 2003:59).

The Augustan propaganda machinery was the vehicle to achieve this. Augustus' person and the attainment of the *pax Romana*⁹⁷ were inextricably intertwined, and the glorious peace celebrated by poets was indissolubly linked to Augustan's military triumph and imperial expansion (see Dunstan 2011:220). The dominant class of Rome, who regarded the attainment of Roman peace as a victory from the epicentre, demonstrated great enthusiasm in safeguarding its heritage via the utilization of poetry, narration, engraving, currency, and architecture (Wengst 1987:7-11). Imperial expansion brought prosperity to Rome, as it became the centre of wealth and influence in the Mediterranean, attracting people from far and near to its shores (Eskrine 2010:81). Domestic aggression and military prowess may be the primary reasons for the empire's longevity, but it also owes its permanency to its ability to coexist with non-Italian peoples (Eskrine 2010:86).

In the *Res gestae Divi Augusti* (Achievements of the Divine Augustus), Augustus depicts himself as a prudent political leader and military commander who brought prosperity to Rome, Italy, and the Empire as he recounts major events and acts for

⁹⁵ It is widely accepted by scholars that the greatness of Caesar Augustus is unrivalled, despite the fact that it has a long history and legacy spanning over two thousand years, with prominent leaders and statesmen such as Cicero, Julius Caesars, Trajan, and Marcus Aurelius having contributed to its stability and longevity.

⁹⁶ Octavius's recorded words to the Senate are: 'I lay down my office in its entirety and return to you all authority absolutely-authority over the army, the laws and the provinces-not only those territories which you entrusted to me, but those which I later secured for you' (Everitt 2006:208).

⁹⁷ The *pax Romana* was a codeword for the all-encompassing Roman imperial propaganda that was theological, political, economic, military, and cultural (Wengst 1987; Woolf 1993; see Carter 2006).

which he intended to be remembered (see Dunstan 2011:201). The popularity of Augustus among Romans in general, and among the senators, was due to his convincing them that the new empire was natural and beneficial. It was a fate to be accepted and celebrated, thus making the empire appear genuine and appealing, even irresistible, which led to him being widely venerated as a deity throughout his life (Galinsky 1996:323-324).

Augustus used propagandist manoeuvring methods from the start to endear himself to the people of Rome and the senate when he surrendered power in his public address on January 13, 27 BCE. This was done without intending to cede control of the Roman army, which granted him superiority over his peers (see Dunstan 2011:221). The *Pax Augusta* was commemorated by the official song composed by the poet Horace. This marked the beginning of a golden age (*saeculum, aureum, aetas*) attributed to the emperor, following the disruption of civil war and a period of relative peace. It proclaimed to the citizens of the Roman Empire what could be referred to as *euangelion*, a term that has been used in Roman political propaganda since the late first century BCE, meaning 'good tidings' or 'gospel' (Poplutz 2015).

The Roman troops were central to the emperor's reign, and the maintenance of the *Pax Romana*; it was thus critical for Augustus to maintain an image of a victorious army general commanding the Roman soldiers (see Hekster 2007:1). Augustus consolidated political and military power by administering an extended province at the behest of the senate. This province hosted most of the legions, giving him direct control and command over the Roman troops and the senate, and showering him with powers and titles, with his domain ultimately known as the 'First Settlement of the Principate' (Dunstan 2011:221). Augustus ruled from the epicentre of the ancient world, the Roman Empire, initiating a reform of the time system that included a reform of the calendar whilst being revered as *divi Filius*⁹⁸ for his prudent political and military decisions (Poplutz 2015).

⁹⁸ This is in reference to the calendar inscription of Priene which read: "Since Providence, which has ordered all things and is deeply interested in our life, has set it in most perfect order by giving us Augustus, whom she filled with virtue that he might benefit humankind, sending him as a saviour both for us and for our descendants, that he might end war and arrange all things; and since he, Caesar, by his appearance excelled even our anticipations, surpassing all previous benefactors and not even leaving to posterity any hope of surpassing what he has done, and since the birthday of the god

The destruction of the Macedon kingdom in 168 BC in the battle for Pydna, prompted Polybius to assert that the Romans were the rulers of the world. Cicero, who regarded expanding the empire's borders as one of a Roman general's objectives, frequently hailed Rome's imperial achievements and commended Pompey and Caesar for taking Roman authority to the furthest reaches of the globe (Brunt 1978). The Romans of the late Roman Empire viewed their sovereignty over the known universe as a divine mandate⁹⁹ (Virgil, *Aen.* 1.277–9, Cicero, *Phil.* 6.19, Livy, *Ab Urbe Condita* 1.16.6–8; see Eskrine 2010:72). Pliny the Elder believed that the unification and development of all nations was predestined to take place through Italy, particularly Rome (Pliny the Elder *Nat.* 3.38–9 122; see Erskine 2010:58). Rome and Italy were considered the epicentres of the world (Pliny, *Nat.* 37.201–5, see Vitruvius 6.1.11; see Eskrine 2010:72). The size of his triumph, as well as the extensive theatre he built in Rome with money from his campaigns, served as a vivid demonstration of Pompey's claim that he had established the same territorial boundaries of Roman sovereignty as those of Earth (Eskrine 2010:72).

The ability to govern is a fundamental characteristic of Rome found in the epic poetry of Virgil¹⁰⁰ (Virgil, *Aen.* 6. 851–853; see Eskrine 2010:73). Rome's opulence was built on the backdrop of sustained exploitation of provincial cities (Eskrine 2010:73). Cities were able to take advantage of agricultural surplus by levying taxes and rents on neighbouring villages, where most inhabitants in agrarian societies such as the Roman Empire were peasants, while simultaneously providing cultural and administrative advantages (Kloppenborg 2000:234).

4.3. LAND OWNERSHIP

Augustus was the beginning of the good tidings for the world that came on his account [... for all these reasons the proposal of the Proconsul to honor him is accepted and the following resolution passed ...](<http://www.masseiana.org/priene.htm>, visited on 05 August 2023).

⁹⁹ Another example of Rome's claim to sovereignty is the map that adorns the *porticus vipsaniae*. It was created by the emperor Augustus's right-hand man, M.Vipsanius Agrippa, and completed by Augustus himself (Pliny, *Nat.* 3.16–17, contra Brodersen 1995: 275–86 who is doubtful about Pliny's reference to a map; see Erskine 2010:72).

¹⁰⁰ Evident in the quote to Aeneas upon his visit to the underworld to meet his father, when he witnessed a parade of unborn Romans lectured on Rome's destiny "Remember, Roman, to rule nations with authority, these will be your skills, to establish the habits of peace, to spare the subjugated and to crush the proud in war" (Virgil, *Aen.* 6. 851–853; see Eskrine 2010:73).

Along with textiles, ceramics, and extractive industries like mining, metallurgy, and quarrying, agriculture appears to have made up a sizeable share of the economy's land use (Shim 2016:77). Based on a speculative analysis of late Imperial trade and land tax records from Edessa and Egypt, Jones estimates that 90% of the national income of the Roman Empire was derived from agriculture (Jones 1974:83; Jones 1964:465). The ancient Roman society was characterized by a land-based economy, in which all agricultural and artisanal activities were dependent on the land. Food was either obtained directly from the soil or obtained indirectly using primary human and animal sources, thus making the history of the Roman nation intrinsically linked to the land (Zuiderhoek 2015:1).

The social structure of the Roman world was based on land being seen as a reliable form of money that was prized above other kinds of currency for several different reasons¹⁰¹ (Tacoma 2015:85). Land was the foundation of wealth and power in the Roman Empire, which was an agricultural society. The aristocracy held hereditary control over the Empire's main sources of labour and land, including land tenure and the use of approximately 65% of Empire's production, and were not elected through democratic processes (Carter 2006:3). The aristocracy is the ruling class of an agrarian society that does not employ any form of labour but relies primarily on the labour of peasants for sustenance (Kautsky 1982:24). Thus, peasants, city dwellers, and traders were forced to work for a living, while the noble elite asserted their superiority over them (Kautsky 1982:200-201). The development of aristocratic civilization was rooted in the need to accumulate sufficient resources to sustain a standard of living, as a tribe invades another tribe through violence and demands tribute or plunder (a form of taxation that empowers the conqueror; Kautsky 1982:52-53). Rome's preference for centralized power concentrated on these two sectors is a strong indication of how the nobility primarily controls peasants through war and taxation (Garnsey & Saller 1987:20). Roman aristocracy developed out of civic responsibility generally, agricultural roles, and/or specialised security functions (Garnsey & Saller 1987:52-53). The acquisition of ownership of agricultural land was essential for the formation of

¹⁰¹ One of the reasons being the principle of *superficies solo cedit*— 'that which stands on the land goes with it', governing Roman law, meaning that whatever was built on the land, by whomsoever, belonged to the owner of the land (Dig. VI.1.23.4; see Jakab 2015:125). On the other hand, a considerable portion of property ended up in the hands of powerful landowners because to the Roman government's encouragement of private land rights (see Kehoe 2015:106).

wealth and economic development for individuals, communities, and nations in historical social and economic conditions (Jakab 2015:130).

Pre-industrial economies and the Roman economy, were characterized by the cultivation of agriculture and the utilization of natural resources, thus making land a fundamental economic component (see Banaji 2001; Erdkamp 2005; Kehoe 2007). The sources of power, according to Plutarch, are alliance, patronage, friendship and kinship, political debate and office, land and peasant control, and of course military resources. Power is derived from land ownership and production (often inherited) and public reputation is derived from others acknowledging one's dominant position through various civil and patronal acts (Plutarch, *Mor.* 58D; also, 100D, 778A; see Carter 2001:10).

Roman socio-political development had a significant impact on the institutions and the political and ideological outlook of Roman society. This in turn had a significant influence on the issues of exploitation and, particularly, the allocation of land, land and agriculture and the associated conflicts. These in turn contributed to the Roman histories of land, state history, and society (Zuiderhoek 2015:1). Roman history chronicles the destruction of the smallholding peasantry, giving rise to the colonate and the slave crisis, the downfall of the republic with the ultimate collapse of the western empire (Harper 2015:43). Roman peasants, who formed the backbone of the Roman army, witnessed a sharp decline in their population due to the importation of slaves from conquered countries. This expansion of the Roman Empire coincided with the increase of rural slavery into Italy in the 2nd century BC as a direct consequence of Rome's wars¹⁰² (Eskrine 2010:85). The increasing wealth of the elite, resulted from the same wars, and their desire to invest this wealth in land. Thus, they acquired land in Italian countryside that had previously been inhabited by peasant farmers who worked the land. The replacement of these farmers by slaves who were conveniently provided

¹⁰² For an opposing view on the negative impact of imperial expansion on Roman peasantry and their dwindling numbers see Lo Cascio (1994, 1999, 2001 and 2009). Rathbone (1981) has argued that the two forms of agriculture may have coexisted in a symbiotic relationship, rather than slave estates eradicating peasant fields altogether; for instance, estates would have had to provide their workforce at certain times of the year. On the other hand, Prior to the beginning of the Second Punic War, Rome may have had an answer to the issue of small farmers being unable to meet the demands of extended campaign periods (Rosenstein 2004).

by the Roman victories in large numbers, put the peasants under considerable pressure (Eskrine 2010:83).

The peasants in the countryside were economically pillaged of all resources by Rome (MacMullen 1974:36). The prosperous urban economies of the Roman Empire relied on the influx of wealth from rural areas to fuel commerce and industries such as construction and artisanal manufacturing that met the needs of urban dwellers (Kehoe 2015:89). In north-western Spain, with an estimated 230 gold mines, the scale and scope of pre-historic mining production was remarkable, as demonstrated by the example of Las Medula.¹⁰³ This demonstrated that certain mining, metallurgical, and quarrying industries were developed during the time of the Roman Empire to satisfy the demand for raw materials such as gold, silver, copper, and tin (Lewis & Jones 1970:169-85; Sánchez-Palencia 2000).

The Roman Empire was considered to be the most prolific in terms of the number of significant toxic remains. This consisted mainly of copper and lead, of the pre-industrial era, with the high level of environmental contamination suggesting that extractive industries were flourishing (Hong *et al.* 1996:246-249; Rosman *et al.* 1997:3413-3416). The bulk of those employed in extractive sectors, like the flourishing quarrying sector that featured marble and colourful stones during the imperial period were free wage employees. This was evidenced by the increased use of beautiful stones in the early Principate, (Dodge 1988:65-80; 1991:28-50; Fant 1993:145-70; Mattingly 2006:292). Ultimately, Roman peasant soldiers were expelled at their own cost as the establishment of extensive slave settlements and the relocation of displaced peasants to cities and towns became a fundamental part of Italian agricultural production, particularly in Rome.

Tensions between the rich and the poor originating from the countryside would eventually lead to the political struggles of the late Republic, culminating in the agrarian reforms initiated by Titus Gracchus circa 133 CE (see Hopkins 1978: 30; Eskrine 2010:83). Peasant farmers were displaced from the land through slave labour (Appian, *Bell. Civ.* 92, Plutarch, *P.L.* 8.1–4, 8.7, 9.4–5, 127; see Erskine 2010:83-84). During

¹⁰³ Pliny the Elder suggests that as much as 20,000 pounds of gold were produced annually at Las Medulas, the area's biggest opencast gold mine, in the first century CE (Pliny the Elder, *Nat.* 22.4.78; see Shim 2016:80-81).

this period, the ruling elite gained wealth and gradually consolidated land ownership (Pliny the Elder, *Nat.* 18.7.35). There is no question that the Romans sought to maximize their profits from the realm, both as public officials and as private traders and lenders (Eskrine 2010:73). Thus, tax collection became a major problem for subjects in provinces during the Republic era, particularly due to collusion between the provincial governor and the *publicani*, autonomous organisations vying for the authority to collect taxes¹⁰⁴ (Digest 39.4.1.1, 101, Polybius, *Hist.* 6.17, 131; see Erskine 2010:73). To address a serious issue beyond extortion, Caesar issued the *lex Iulia de repetundis* in 59 BC, specifying what magistrates could and could not do in a province (Lintott 1993:99-107). Land tenure varied throughout the history of the Roman Empire, with the rise of princely estates as a major source of income for noble families during the decline of the empire (Momigliano 1982:12, quoting Niebuhr 1804).

Niebuhr (1804) is one of the earliest pioneers of the accumulation thesis¹⁰⁵. The Roman nobility continued to accumulate wealth through acquisitions, incursions, and the evictions of small farmers and their replacement with slaves as the Gracchi failed to control the growth of large territories (see Laboulaye 1839). The primary cause of the empire's decline in economic growth and population was the exclusion of the general population from the political economy (De la Malle 1840). Private settlements that were greater than the area of an entire city existed (De la Malle 1840:218). The large villas of the consorts in Rome were described by Olympiodorus as resembling a mid-sized metropolis, with forums, temples, aqueducts, baths and even a hippodrome (De la Malle 1840:218). Lo Cascio (2009:64-65) observes the progressively greater concentration of property in antiquity. Nevertheless, the productivity of enslaved labour declined with the growth of large estates and the intensification of class conflict (Ciccotti 1971 [1899]:217). Land distribution and agrarian debts were a major factor in the early conflicts between the patricians and the plebeians (Dionysius & Livy; see Zuiderhoek 2015:1). The Gracchan crisis and its subsequent internal strife was

¹⁰⁴ Cicero's *In Verrines* is a collection of speeches detailing the trial and indictment of Sicily's former governor Gaius Verres for maladministration (Digest 39.4.1.1, 101, Polybius, *Hist.* 6.17, 131; see Erskine 2010:73). The tribunal, which was established in 149 BC to adjudicate cases in which a judge was accused of unlawfully profiting from his duties in a province, the *quaestio de repetundi* (derived from Latin phrase "*pecuniae repetundis*", which translates to "money to be recovered") is another example of maladministration (Erskine 2010:74).

¹⁰⁵ For a contra view to the accumulation thesis see Lewit (1991:31-5; 2004), and Harper (2015) amongst others.

precipitated by the conquest of Rome, the establishment of colonies on land that had been converted into public land, and the resulting conflicts over the allocation and utilization of this public land. Meanwhile the dissolution of the Roman republic was precipitated by a dispute between powerful warlords over the allocation of land to many veteran soldiers (Zuiderhoek 2015:1-2).

Leading senators in the West boasted huge wealth, coupled with more nobility than any of their counterparts in history (Wickham 2005:156). The growth of large-scale parcelled-out farms and farm tenancy and the rapid accumulation of land were essential elements of rural life and economy in late antiquity (Giardina 2007:752). The two ends of the peninsula were connected by Roman roads, which took over land and divided it into Roman colonies. This attracted people and goods to the capital, where slaves provided the main agricultural labour force, and Villas appeared in the landscape because of improved security and the introduction of new agricultural methods (Erskine 2010:85). Any agrarian society's use of the plough, which increased farming from tiny plots to whole fields, was its defining feature (Miller 2014:48).

4.4. IMPERIAL POWER DYNAMICS

Interpretation of Roman imperialism takes two basic assumptions, that is, the imperialism of the 19th century and contemporary globalisation of the 21st century (Mommsen 1887:4-5; Haverfield 1905; Hingley 2000; Freeman 2007; Witcher 2000; Hingley 2005; Hitchner 2008; see Erskine 2010:58). The former views the introduction of civilization and Roman culture to underdeveloped populations as a smokescreen for Roman imperialism, whilst the latter views the conquered native peoples as active participants in being 'Romanised'. Roman imperialism is considered a form of "romanization" of the conquered, backward indigenous population (Erskine 2010:58). Tacitus satirizes the traditional characteristics of slavery in the way that the governor of Britain, Agricola, taught the primitive British the elements of Roman culture (Tacitus *Agricola* 19–21,158: see Pliny the Elder, *Nat* 3.38–9,122; see Erskine 2010:58). Roman power has had a variety of effects on conquered peoples, ranging from assimilating and socialising them into Roman society, to creolising them in a variety of ways, drawing on more contemporary imperial or colonial practices (Erskine 2010:62).

Ando (2000) argues that, due to the advantages offered by the Roman Empire, Roman subjects began to accept that the empire was beneficial. As a result, they supported and even advanced the ideology of the empire, thus agreeing to their own enslavement. Nevertheless, the concept of Roman goodwill is highly speculative when considering the level of fear and loyalty that Roman authorities expected of their subjects. These authorities were mysterious and capricious figures who valued the use of violence and arbitrary power (see Lendon 1997:201-209). Roman imperialism presented its authority as a form of benevolent government in the interest of its subjects (Eskrine 2010:72-73). Practical reality, however, defied this propaganda claim (MacMullen 1974:8-11). Cicero's numerous references to the relationship between Rome and its subjects are revealing, and one of them is that between a slave and a master, the master may appear to be pursuing the interests of his subjects, however, this is contingent upon their obedience. Rome changed under imperial rule, growing to be the biggest city ever known with a huge population, great structures, and spectacular games, all of which were paid for with money seized from the empire's subjects and defeated enemies (Eskrine 2010:77).

The Roman Empire however needed economic resources, and the state had to drive operations like food supply for the Roman populace and army. Such resources included metal extraction and management for currency development, and the use of marble and ornamental stone in public construction and imperial decoration (Mattingly 2006:296). In all eras and strata of Roman society, state-sponsored violence was a common occurrence (Erskine 2010:69). The Roman society was organised around a system of unequal treatment, accepted as a natural or unavoidable part of the Roman society's maintenance of the *pax Romana*. This enforced Rome's sovereignty over the entire Mediterranean region and established judicial institutions that regulated property and labour laws (Häkkinen 2016:1). The subsequent development of the city through the rise of influential figures such as Caesar and Pompey in the first century BCE was funded by the revenue of war and the empire. Rome's preponderance over its subjects was further emphasized by the extensive construction projects conducted by the emperors Pompey, Caesar and their successors (Eskrine 2010:80). Augustus asserts that he discovered Rome in bricks and laid it out in marble to emphasize the way he had changed the city (Suetonius, *Aug.* 28; see Erskine 2010:80).

Individuals who were socially marginalized due to criminal behaviour, strife, poverty, or religious belief were executed to bolster the social and political fabric of Rome, both within the provinces and within Rome itself (Erskine 2010:70). Taxation, debt, expropriation of land for colonies, loss of liberty, conflict between ancient customs and new Roman ways contributed to revolt. Refusal to enlist in the Roman army, Roman arrogance, religious interference, and resentment of a local government supported by Rome was another common response to empire (Erskine 2010:66). Ordinary people thus knew their unequal and vulnerable position in the Roman social order (Miller 2014: 45).

Raising taxes and retaining control were simple and logical goals for the Romans (Erskine 2010:60). The Roman Empire was an aristocratic state that was ruled by a small elite group, or about 2% of the population, who used military force, control over the primary source of land and its exploitation. They exercised great political influence, and the extortion of vast sums of money through taxes, rent, and tribute to impose their will on most of the populace (Carter 2001:9). The elite's dominion over the essential resource of land and its production, coupled with their significant political influence and accumulation of immense wealth through taxation, rent, and tribute, developed a "legionary economy" within the Empire. This resulted in the military might of the legions enveloping the economy, compelling most individuals to comply with tribute and tax payments (Carter 2001:9-10). Varied and often degrading methods were employed to demonstrate the hereditary superiority of the ruling elite and their right to collect taxes (Kautsky 1982:110). They reigned, managed riches and status, impacted the social lives of the empire's citizens, and affected the level of living (Carter 2006:3). All economic benefits were allocated politically to the ruling elite through a combination of extraction, distribution, and tribute (Hanson & Oakman 1998:777). The long-term prosperity of Roman society was certainly affected by the distribution of wealth (Kehoe 2015:90).

Imperial extraction and exploitation of resources¹⁰⁶ in the Mediterranean region left a huge legacy of metal implements, weaponry, coins, glassware, pottery, structures, and

¹⁰⁶ Roman Empire's Mediterranean triad consisted of cereals, wine, and olive oil, with wheat becoming the dominant staple crop (see Garnsey 2008:679-709).

other artifacts owing to a large-scale production and construction boom (Zuiderhoek 2015:2). The structure of the economy of the Roman Empire was primarily for the benefit of the landlords, rather than the peasants, the rich rather than the common people, and the masters rather than slaves. Power and wealth were concentrated in the office of the emperor, who kept a separate treasury and made laws that had the power to affect the economy and, therefore, the environment (Hughes 2004:29).

The term empire comes from the Latin word *imperare*, meaning to command, and is often used to describe a system of absolute power and inequality based on military power (Duling 2005:51). It was believed that the Roman Empire had two components. First the right of command was bestowed upon certain representatives and civil servants of the Roman state by the gods. Second was a specific territorial sense to indicate the territory, population, and resources over which Rome governed (Pliny the Elder, *Nat.* 6.30.120.; Tacitus, *Germ.* 29.1; *Hist.* 1.16; see Carter 2001:9; see Wengst 1987:55-72). The connection lies in the fact that the concept of the 'right of command' was often associated with law and authority (Carter 2001:9). This concept of war (military action or the prospect of military action) provided a legal basis for the conquest and formation of the Roman empire (Richardson 1991:8). Specialised armed conflict-related activities provided the elites with the greatest opportunity to manipulate the general population, as they reinforced the notion that they were offering the peasants physical protection and security in exchange for their excess resources¹⁰⁷ (Kautsky 1982:100-101).

In Aeneid, Virgil asserts that Jupiter predestined Rome to rule all countries so that the world's less fortunate peoples could profit from Roman civilisation (Fear 1981:42). Empire denotes patriarchal, hierarchical, violent, and elitist social institutions (Carter 2001:177). The social and economic policy of the Roman Empire could be characterized by the Roman system of inequality (Garnsey & Saller 1987:125). Both the Roman Republic and its successor, the Empire, were examples of agrarian societies that developed into "conquest states", ruling over other national and religious communities (Lanski 1984:195-196).

¹⁰⁷ This was the primary rationale for the Pax Romana, as evidenced by Roman writings such as the *Res Gestae* in which Augustus' explains the reasons for conquering the known world (see Miles 1999:49).

As Foster retorts:

[B]road areas of peasant behaviour are patterned in such fashion as to suggest that peasants view their social, economic, and natural universes-their total environment-as one in which all of the desired things in life such as land, wealth, health, friendship and love, manliness and honour, respect and status, power and influence, security and safety, exist in finite quantity and are always in short supply as far as the peasant is concerned. Not only do these and all other “good things” exist in finite and limited quantity, but in addition there is no way directly within peasant power to increase the available quantities. It is as if the obvious fact of land shortage in a densely populated area applied to all other desired things: not enough to go around. “Good,” like land, is seen as inherent in nature, there to be divided and redivided, if necessary, but not to be augmented

(Foster 1965:296).

Resource availability was restricted and unfortunately inadequate to accommodate all. No feasible approach allowed expanding allocation, given that a greater portion for one would inevitably translate to a smaller portion for another, indicative of the scarcity of all goods, which were both limited and already apportioned (see Malina 1981:71-93;1987:354-357).

4.5. SOCIAL STRATIFICATION

Lenski (1984:2-3,189-296) examines the distribution of resources within societies such as the Roman Empire by examining the historical patterns of social stratification within these societies. The ancient world was characterized by an agrarian economy, which was the basis for wealth and income, both for the state and for individuals (Aubert 1994:117; Erdkamp 2005:12). The possession of a large amount of land is how Pliny the Elder defines the word *locuples*¹⁰⁸ (wealth) (Pliny the Elder, *Nat.* 18.3.11; see Jakab 2015:115). An individual was considered wealthy in the late Republic if they owned a significant amount of agricultural land (Jakab 2015:115).

¹⁰⁸ *Hinc et locupletes dicebant loci, hoc est agri, plenos* translates as “hence they also said that the rich of the place, that is, of the land, were full” (Modified translation from Google translate, https://www.google.com/search?q=google+translate&rlz=1C1GCEA_enZA1054ZA1054&oq=google+&aqs=chrome.0.69i59l2j0i131i433i512l2j69i60j5j69i60l2.7239j0j9&sourceid=chrome&ie=UTF-8, visited on 15 August 2023).

Furthermore, the political power of the Roman Empire was largely concentrated in the hands of the emperor and its local representatives, who held control over a vast number of territories and their associated resources. This resulted in an abundance of wealth and influence due to stratification, which was the almost universal method of distributing limited resources between groups and individuals (Lenski 1984:46,85). Equestrians, provincial senators, and city elites benefited from Roman property rights which fostered wealth stratification, favouring their significant wealth accumulation (Kehoe 2015:92). Many of the smaller cultivators, who had enjoyed a degree of economic stability from the protection afforded to them by the state lands, experienced a dramatic change in their situation due to the increasing stratification of tenure¹⁰⁹ (Kehoe 2015:100).

According to Lenski (1984:26-27,41), the aim of society is to amass resources for survival, prosperity, and social position, which is frequently enforced by governing groups, even if it hurts other people or the ruling class. This behaviour is acceptable in the same way individual cooperative behaviour frequently stems from and results in self-interest.¹¹⁰ A hegemonic group's two main goals in any human society are the preservation of political status quo and the expansion of resource production (Lenski 1984:41-42). Political cycles within human societies are characterized by the repetitive emergence of a new elite group, who take power through coercion and violence, and who then attempt to legitimize their rule through law rather than force (Lenski 1984:56). The non-elite, who are virtually powerless, watch while the new ruling group manipulates the distribution of power using natural or supernatural¹¹¹ claims. These include the deliberate and explicit alteration and modification of laws, and, in certain cases, the manipulation of other institutions to promote their rule (educational institutions, media, religious institutions, etc.) (Lenski 1984:52-55).

¹⁰⁹ This is particularly true of in Egypt where the small farmers had favorable conditions under the Ptolemaic dynasty but suffered after the Romans conquered the land during the Julio-Claudian and Octavian period (see Kehoe 2015:88-106).

¹¹⁰ Example is 'antagonistic cooperation' in team sports involving individual players cooperating solely for the satisfaction of victory (Lenski 1984:26-27).

¹¹¹ By combining elements from various Trojan, Greek and Roman tales to create a mythical divine origin for both him and the empire, Augustus immediately began to solidify his reign as the embodiment of divine will and favour in the Roman Empire (see Fears 1981:7-9; Huskinson 1999:102).

Access to land was regulated by sacred and political institutions, rather than the law, in early Roman society (Jakab 2015:111). The Roman Empire was a 'natural state', and its general laws were largely the product of elite alliances formed to share political power and economic and social advantages¹¹² (North, Wallis, & Weingast 2009). The social order was based on the supremacy of the noble classes. The elite's system of jurisprudence imposed minimal penalties for high crimes perpetrated by the noble classes, while simultaneously imposing severe penalties for low crimes committed against the ruling classes (Kautsky 1982:199).

The Roman judicial system was unequal in favouring the testimony of the elite over the non-elite and grew worse with deepening social hierarchy as ordinary people were deeply punished into subservience (Garnsey & Saller 1987:111,118). Agricultural tenancy was supported by an institutional framework that promoted economic inequality, thus creating an uneven playing field between landlords and tenants (Keddie 2019:71-72). Moreover, the legal system of agricultural tenancy, which was essential for the Roman agricultural economy, provided the wealthy landowner with a stable source of income and a high degree of managerial autonomy (North *et al.* 2009). Exploiting natural resources was closely linked to the acquisition of land ownership rights (Jakab 2015:114).

Although the Roman Empire claimed that it gave advantages to all conquered peoples,¹¹³ the reality is that like the Lenski model, such advantages and services were primarily given to the elite. Where they were given to those subjects to rule, they were expected to reciprocate with loyalty and respect (Garnsey & Saller 1987:149). The real issues were labour's social and economic value in combination with land exploitation and access to natural resources (Jakab 2015:107). Cicero's quote, in Champion (2004:261) is another typical example:

The province of Asia must be mindful of the fact that if it were not part of our empire, it would have suffered every sort of misfortune that foreign wars and

¹¹² Kehoe's claim (2015:90) that the US and Europe are the only two 'open-access societies' in accessing the law and government services is unfounded. Colourism which has a class-component plays a major role in accessing the justice system and social welfare services in the US and Europe. For more on the discriminatory treatment of African-American males, as well as other minorities and economically disadvantaged groups in the American criminal justice system see (Alexander 2012).

¹¹³ An example is the *Res Gestae* detailing Augustus' self-narration of life during his rule.

domestic unrest can bring.... Let Asia not grudge its part of the revenues in return for permanent peace and tranquillity.

The social, economic, and political divisions that characterized the Roman Empire were alleviated by the patronage of the elite¹¹⁴ (Garnsey & Saller 1987:148). For example, members of the higher and lower social classes interacted with each other on a regular basis in the form of patrons and clients, exchanging favours, respect, and loyalty (Garnsey & Saller 1987:151-152). Carter (2001:75-99) argues that the culture of the New Testament is characterized by a hierarchy and patriarchy, with the emperor as its dominant figure and the military and system of parasitic patronage.

The rulers were composed of the wealthy families belonging to the urban elite (Rohrbaugh 1993:383). The ownership patterns of the large Egyptian estates denote a closely-knit network of relatives, friends, cronies of the emperor, and imperial freedmen (Tacoma 2015:84). Land played an important role in the formation of networks and in the establishment of elites, thus making land acquisition or transferring a political and social issue based on ideology and commitments (Tacoma 2015:86). The perpetuation of social stratification was further supported by the establishment of an imperial cult which fostered the notion of divine favour on the government of the emperor (Botha 2011:8). The hegemonic concept of controlling power and the associated hierarchical social structure were supported by elite values (Carter 2006:10). The values of the elite remained unaltered, regardless of whether the individual ruler or the most powerful noble family was changing at any given time, while the fate of the general population remained unchanged (Miller 2014:57).

Hierarchy, verticalization, extreme inequality, dominance, exclusion, and forced conformity are the hallmarks of the ruling elite of the empire (Carter 2001:10). Power dynamics produced a hierarchical network with the emperor as the centre of attention

¹¹⁴ Augustus' primary objective was to provide food for Rome, grain growers in every province had access to an easily accessible market for their produce (Perkins 2000:209). There is evidence to suggest that Augustus' patronage may have aided in the revival of several regions of Asia Minor from a period of civil war (see Gill 1994:441; Trebilco 1994:299-300). Many peasants however were deprived of their most valuable assets and placed in arrears, since the high-class portion of Rome's taxation imposed on Asia Minor and other regions was passed on to the lower-class at a rate they could not afford (see MacMullen 1974:33-34; Garnsey & Saller 1987:98; Crawford 2004:98; Hopkins 2004:118-119).

for the entire system (Tacoma 2015:85). The domestic provincial elites were the real beneficiaries of Roman governance, as it was in their interest to remain in power and increase their wealth and position, and the Emperor (Pliny the Younger) was accountable to the elites for the advancement of their interests (Kelly 2006:33-34, 46-48). The primary aim of the legislation was to safeguard the privileges of the wealthy at the expense of economic growth and the well-being of the public. Economic entities, even if successful, remained in existence because their patrons continued to support them even though their actions harmed the economic system (see Ogilvie 2007). Urban centres¹¹⁵ concentrated economic surplus, specialized commodities, and skilled artisans for elites, resulting in political, economic, religious, and cultural power concentration (Lenski 1984:200, 205).

The Roman Empire was characterized by competition and collaboration between the Roman state and local elites, as the state competed for resources with the local elites¹¹⁶ (Kehoe 2015:91). The Roman government sought to protect small farmers and tenant farmers, the biggest producers in the agricultural economy. Legal institutions protecting private land ownership were nevertheless created by elite interests in competition with the state's interest in safeguarding its sources of income (Kehoe 2015:104). The imperial patronage system however was such that the emperor rewarded the spoils to the wealthiest. Powerful classes and could equally limit the amount of wealth for these classes which became a source of conflict between emperor and aristocracy (Hopkins 2009:180-181, 187-190).

The Roman Empire was characterized by a hierarchical system of land ownership, with the stratification of land increasing progressively over time (Kehoe 2015:90). The Roman emperor and the ruling elite, which included senators, governors, procurators, local elites, and decurions, ranked at the apex of Lenski's stratification model. Here, a minority of the population controlled most of the agricultural land and its excess yield,

¹¹⁵ Hellenistic East cities maintained self-government and rural control, influenced by Rome-aligned elite judges (Garnsey & Saller 1987:26).

¹¹⁶ The state had to balance between the interests of the small farmers who were the backdrop of the Roman economy and the land accumulation penchant of its elite patrons. The state also had to choose between managing farmland and giving more land to farming tenancy and exact fiscal rents, which might be a deterrent for the elite to invest in private land acquisition or focusing its fiscal policy on exacting taxes from private property (see Monson 2012:159-208). Private landlords and the Roman government had conflicting objectives and were at odds over who would benefit from the surplus produced by the vast majority of the Empire's peasantry (see Kehoe 2015:106).

either directly through an exclusive right or indirectly through taxation and tariff (Lenski 1984: 214-16, 220-21). The emperor who successfully inherited or simply appropriated the wealth of their predecessor had direct control over all imperial resources¹¹⁷ (Tacoma 2015:71).

The Roman Emperor received the Ptolemaic royal estates (*doreai*), which were part of the Roman Imperial royal estates (*ousias*), as a direct consequence of the distribution of royal estates. He would then distribute these estates as gifts to his family and trusted friends, which ultimately returned to his control¹¹⁸ (Tacoma 2015:76). According to literary sources, Seneca, Akte, and others close to the emperor acquired their lands as a result of imperial favours and owed their riches to the emperor throughout the Julio-Julius period, without any personal interest in Egypt as Octavian gave Egyptian lands to his relatives and friends as gifts (Parassoglou 1978:24,26). Following the Sicilian conquest, the behaviour of Octavian bears a striking resemblance to his behaviour in Egypt (see Crawford 1976; Thompson 1987). The Roman Empire regularly transported large quantities of grain from various regions, including Campania, Sicily, North Africa and Egypt, to feed its population (see Erdkamp 2009). The economic and political power of the land-owning elite of the empire was supported by the formation and preservation of private property and institutions established by the Roman government to promote their interests (Kehoe 2015:91). Autocracies are characterized by the regular transfer of power and wealth to interested parties (Tacoma 2015:84). The ownership patterns of the Egyptian large estates denoted a closely-knit network of relatives, friends, cronies of the emperor, and imperial freedmen (Tacoma 2015:86).

In addition to the political and economic benefits of holding public office, the ownership of land gave the elite the certainty of wealth and status that could be inherited by future

¹¹⁷ The Actium's victory and subsequent occupation of Egypt provided Octavia with access to the Ptolemy dynasty's resources, including extensive royal lands that had previously been sequestered by Cleopatra VII (Parassoglou 1978:3; Rowlandson 1996:55; Capponi 2005:105; see Tacoma 2015:71).

¹¹⁸ This is the traditional view on how the royal family acquired large tracks of estates called 'direct redistribution' interpretation. The Roman Empire inherited Egypt's long-standing tradition of state ownership of land. This originated in the first two centuries BC, when, under the Ptolemaic dynasty, private land was formally owned by the royal house or temples, but privately held, leased at reduced taxation rates during Roman rule (see Monson 2012: 108–55). Parassoglou (1978) offers a contrary view on imperial property terminology and its acquisition through open market (see Tacoma 2015). A third view is offered by Tacoma (2015) who argues that the royal houses were acquired through normal Roman principles of property devolution. Tacoma (2015:79) argues that in theory, emperors could have purchased land, given land as gifts, taken land as taxes, or inherited land.

generations. Rome, characterized by its incessant competition for status and patronage, served as a model for provincial local elite structures (Hope 1999:137). Hereditary inheritance and intermarriage were the primary sources of the aristocracy. The elite received most of the economic surplus regardless of whether peasants taxed their land or resided on the land as tenants and paid in kind to the elite landlord (Kautsky 1982:100). Rather than providing long-term benefits to the non-aristocratic population, these philanthropic gifts of public amenities, entertainment, food and other public services were magistral city requirements. They served to legitimize and consolidate the power of Rome and its associated elite collaborators (Garnsey & Saller 1987:33; Whittaker 1993:294-295). Emperors in the Roman Empire were powerful, resource-rich men who governed by resource exploitation, displaying wealth through triumphs, grand games, and distributed money and food in ritualistic handouts (Tacoma 2015:71). It appears that the rich emperor spent his time dividing his wealth, which he accumulated in different parts at different times (Tacoma 2015:85).

The retainer class received a small portion of the economic surplus and a slightly higher social status than the general population in exchange for their labour. Nonetheless, they continued to serve the political elite and function as minor functionaries, professional soldiers and personal bodyguards (Lenski 1984:243-244). The elites employed retainers, dependent on the pleasure and approval of their masters, to implement and maintain their control over most of the population while using them as buffers and intermediaries to carry out the real transfer of surplus and absorb much of the resentment of non-elitists in the process (Lenski 1986:246). Maintaining retainer status, and thus the status quo, necessitated loyalty to the elite to maximize personal power and status, and conversely, retainer defections to non-elite would seriously endanger those of the elite (Miller 2014:50). As a member of the ruling class, Plutarch stated that respect for someone with authority, wealth, or reputation was motivated by wealth and reputation rather than experience, virtue, or age (Plutarch, "*How to tell a flatterer*," *Mor.* 58D, 100D, 778A, see Carter 2001:10).

4.6. LUKAN CONTEXT

The temporal discontinuity between Luke's gospel and the narrative world of his gospel¹¹⁹ presents a textual difficulty, as Luke positions his narrative of Jesus squarely within the geographical context of Palestine, even though Luke knew Palestine was a component of the Roman Empire (Lk 2:4; Scheffler 2011:118). Bridging the gap from Luke's initial readers' social milieu to the text of his gospel, remains an unresolved challenge as manifested by 'form criticism' and 'redaction criticism',¹²⁰ This is because Luke constructs a figurative realm of storytelling, wherein the examination of social interactions and values becomes imperative (Moxnes 1994:379).

An optimistic supposition¹²¹ exists concerning the interplay between the writer, his literary output, and his readership, positing that Luke had a definite readership with discernible features. Luke divulged implied factual details regarding this readership, and the Lukan readership may be broadly characterized based on said details. This is the impetus behind the intense fervour to pinpoint the Lukan community (Johnson 2013:129-130).

To provide an indication of the social background of Luke's earliest readers, it is essential to compare the narrative environment of the text to the social environment of the ancient Mediterranean region. It is necessary to combine the social environment in the text with the knowledge of the social and historical environment of the text from other sources (Moxnes 1994:380). It is postulated that the depiction of the societal circumstances will furnish a more refined comprehension of the Lukan motifs. This will enable the transition from the written word to its contextual milieu, and from the said milieu to the import of the written word (Johnson 2013:130).

¹¹⁹ Scheffler (2011:118) asks a relevant question on whether Luke must be read against Palestinian or Roman background. This study views Palestine as the narrative world of Luke, and Eastern Graeco-Roman city-state as the historical world and seeks to reconstruct both worlds to tease out the Luke's radical message of 'good news to the poor' and 'wealth renunciation'. Accordingly, the socio-economic conditions of both first-century Palestine and Eastern Graeco-Roman city-state will be analysed. The various criticism(s) are only treated in as far as they assist in reconstructing the Lukan world. The study is concerned with the text of Luke as we have it today.

¹²⁰ The former endeavors to ascertain a *Sitz im Leben* for gospel passages by examining prevalent circumstances within the community, whilst the latter strives to establish a relationship between the author's objectives and the precise conditions he addressed (see Johnson 2013:133-134).

¹²¹ This presupposition is based on the exegetical method called "mirror method" prevalent in the study of the Pauline Corinthian letters. Johnson (2013:138-139) warns that the adoption of this method into Lukan scholarship, engenders a problem-centred approach of the Pauline letters, rather than viewing Luke as a theological work whose literary composition is propelled by a definite purpose, especially since little is known about the author and his addressee(s).

The Lukan universal motif assists in this regard, as Luke did not intend his work to be confined to a specific location (neither in Palestine nor in Rome). Rather, it is to be accessible to the whole world, as is evident from his inclusive approach (Bauckham 1998). Bauckham's interpretation of Luke's universal vision should, though valid, not diminish the context-bound situations in which his texts were written (Scheffler 1993:81-83; Scheffler 2006:78-82). Accordingly, the investigation of the Roman economic context and how it influenced Luke's writing is warranted (Scheffler 2011:118).

The social situation in which Luke's community lived was an urban setting in the Eastern Mediterranean that was shaped by the honour and patronage culture of the Hellenistic city. In this, Luke forging a counter-cultural ¹²²common identity and ethos for a socially and ethnically diverse group of Christians (Moxnes 1994:379). The location of Luke is widely accepted, partially based on certain elements of the text. These include the descriptions of houses in a landscape and culture distinct from the one found in a Palestinian village. They describe as well as the use of Hellenistic terminology in Jesus' statements about future persecution, which reflect a situation in the Hellenic diaspora (Stegemann 1991:81-84; Robbins 1991:316-318). Esler (1987) employs socio-economic data obtained from the Lukan corpus for the purpose of establishing a socioeconomic profile of Luke within the framework of a Greek Eastern urban audience. This endeavours to delineate aspects of life in Greek Eastern urban centres to grasp the impact of Luke's perspective on wealth, and rich-poor binary on his audience. The atmosphere of the Lukan community, both within and without, is informed by the typical characteristics of urban life in Greco-Roman cities. This is evidenced by the scholarly transition from searching for sites or historical events to recognizing and describing the general characteristics of life in several Hellenistic cities located in the eastern region of the Roman Empire (Stegeman 1991:26; see Moxnes 1994:381). To comprehend Luke's message, it is imperative that we delve deeper into the intricate complexities of a Greco-Roman city, specifically in regard to its social and

¹²² Moxnes (1994:383-387) perceives the ethos of meal-sharing adopted by Luke as a deviation from the city's ideals of patronage, benefactions, and the pursuit of honour, thereby cultivating a sense of shared identity among a diverse community comprising both nonelite and elite peripheries.

ethnic makeup, political influence, and socioeconomic interrelations (Moxnes 1994:381).

Luke's urban metropolis exhibits spatial stratification¹²³ wherein a select few elites, comprising the city's nucleus, amalgamate affluence with public officialdom and priesthood within the principal cults of the city. These officials thereby exert authority over the city's terrain and economy, in addition to its political, social, and religious fabric (Moxnes 1994:381-382). The populace was predominantly composed of non-elites, encompassing individuals from the lower echelons of society. They were engaged in menial professions and were precluded from seeking citizenship or procuring landholdings within the metropolis. The population included workers and slaves of the elites, whilst the indigent, and the poor, resided beyond the city's outskirts or adjacent enclaves (Moxnes 1994:382). The local aristocracy was allowed to retain their power by Rome. However, the Eastern cities were governed by the Roman emperor through the utilization of governors and other political and military officials (Moxnes 1994:382). The conventional Graeco-Roman aristocratic values¹²⁴ are therefore anticipated to subsist within the urban hubs of the Roman East.

There are two common approaches that are used to determine the social class of Lukan figures, how they spend their money and how their behaviour interacts with the heterogeneous social class of the first-century Lukan audience (Rogers 2019:13). The first approach concentrates on the explicit terms used to describe a character as wealthy or poor and draws various inferences about the wealthy and poor in Luke's audience, referring to some historical reference either prior to or subsequent to Luke. The second approach concentrates on historical evidence pertaining to the socioeconomic aspects of the world Luke inhabits, emphasizing the social structures prevalent in the ancient Mediterranean, which is then applied to the gospel of Luke (Rogers 2019:13).

¹²³ Excavations in Ephesus revealed Souterrain houses believed to be the residences of the elites who dominated the affairs of the city (see Moxnes 1984:381-382).

¹²⁴ Roman imperial features and elite values have been properly canvassed in Motuku (2018); see (Lenski 1984:189-296; Carter 2001; 2006; 2015; Weaver 2009).

The binary method, or binary tunnel vision (see Scheidel 2006:54) exists where elites are positioned above the subsistence level and non-elites below (Alföldy 1985; Meggitt 1998). This is gradually being supplanted by scaled strata that prioritize access to resources as a more accurate gauge of economic status than lexical studies. Nevertheless, these scales, remain grounded in caloric requirements, rendering access to grain or calories, a fundamental economic indicator of poverty (see Stegemann & Stegemann 1995; Friesen 2004). Three groups are identified, based firstly on calculations of the minimal daily caloric requirements for survival, next the daily salary required to buy those calories, or third the size of the farm required to generate those calories, if they were below the borderline, within the borderline, and above the borderline (Stegemann & Stegemann 1995). Friesen (2004) developed a seven-tiered economic poverty scale to provide a more precise definition of the so-called non-elite, placing each person on the scale relative to their subsistence level. Longenecker (2010), recognized that the wealthy cannot be encompassed within the parameters of a poverty measurement scale. He therefore proceeded to broaden the intermediate range of Friesen's scales whilst simultaneously rebranding it as an economic scale. It is clear from economic scaling that neither the rich nor the poor is a homogeneous group (Rogers 2019:34).

To demonstrate that any form of wealth ethics or even socio-economic analysis of the Lukan gospel one must consider in greater detail the audience Luke anticipated. Rogers rewrites the way Lukan scholarship interprets the social and economic evidence of the text and the ancient Mediterranean and the lens from which the collected evidence is viewed (Rogers 2019:14). To emphasize the disparities in socio-economic status between the text and its readership, Rogers (2019:15) creates socio-economic profiles for the intended audience and the characters in the narrative. He outlines how the various socio-economic profiles interact within the text, from the perspective of the audience's historical context. For example, possessions and behaviours, rather than subsistence, are better indicators of economic status in gaining a better comprehension of the early Christian groups. Moreover, economic scaling best delineates audiences that are behind, within and outside the Lukan text (Rogers 2019:15). Thus, a new comprehensive socio-economic analysis of Luke and his audience is needed. This should move away from lexical or caloric profiling, while focusing on behaviours reflecting daily life in the ancient Mediterranean and assuming

economic standing (Rogers 2019:38). To paint a comprehensive picture of first-century life, Rogers uses Longenecker's scale for economic strata while using possessions and behaviours as the yardsticks for one's economic position (Rogers 2019:38).

The two most widely associated classes, the wealthy and the poor, are an oversimplification of a more intricate first-century social structure composed of between 500,000 and one million individuals (Scheffler 2011:119). Those like Friesen (2004:323-361) and Longenecker (2009:243-278) who were unconvinced by a binary analysis of the Roman economic system have proposed alternative economic stratifications based on more complex criteria. Friesen's socio-economic analysis of early Christian societies concentrates on cities with a population over 10,000, utilizing a seven-tiered poverty scale that divides the non-elite into four categories and the elite into three tiers. Thus, to place Luke in the context of the first century Rome, a greater level of complexity is required than that of Luke's binary language (King 2019:159).

Most sociologists now consider social stratification to be a multi-level phenomenon in which a person's overall position is the sum of their positions in all relevant categories (Meeks 1983:540). Rome had several economic classes, as attested by multiple scholars (see Whittaker 1993; Friesen 2004; Scheidel 2006; Longenecker 2009). Luke's economic discourse is intricate, and the distinction between the wealthy and the poor, as well as the concept of good news versus bad news, does not fully encapsulate it (Shim 2016:21; see Esler 1987).

Friesen (2004:331-337) perceived a lack of interest in poverty in the context of New Testament studies¹²⁵. He also believed that the focus on social status was having a detrimental effect on any meaningful exploration of poverty in the Bible or economic analysis in general. Consequently, he developed a seven-level scale of poverty.

¹²⁵ Friesen lamented that the "shift everyone has noticed between [Adolf] Deissmann and the new consensus looks to me like a shift within the discipline from one capitalist orientation to another: from Deissmann's perspective of bourgeois industrial capitalism of the early twentieth century, to the new consensus perspective of bourgeois consumer capitalism in the late twentieth century. At both ends of the century, the dominant interpretations of Paul's assemblies fit comfortably with their respective contemporary, dominant, Western ideologies. As a result, the discipline of Pauline studies in the early twenty-first century appears to have no interest in why people were poor or how the Pauline assemblies dealt with economic injustice. Instead of remembering the poor, we prefer to discuss upwardly mobile individuals and how they coped with the personal challenges of negotiating their ambivalent social status" (Friesen 2004:336).

| ECONOMIC CLASS | CLASS DESCRIPTION | % |
|--|--|-------|
| (1) Imperial elites | The imperial dynasty, Roman senatorial families, a few retainers, local royalty, few freed persons | 0,04% |
| (2) Regional or provincial elites | Equestrian families, provincial officials, some Retainers, some decurial families, some freed-persons some retired military officers. | 1% |
| (3) Municipal elites | Most decurial families, wealthy men and women who do not hold office, some freed persons, some retainers some veterans, some merchants | 1.76% |
| (4) Moderate surplus resources | Some merchants, some traders, some freed persons some artisans (especially those who employ others) military Veterans | 7% |
| (5) Stable near subsistence level (with hope of remaining above the minimal level) | Many merchants and traders, regular wage earners artisans, large shop owners, freed persons, some farm families | 22% |
| (6) At subsistence level (and often below minimum level to sustain life) | Small farm families, labourers (skilled and unskilled) artisans (especially those employed by others), wage earners, most merchants and traders, small shop or tavern owners | 40% |
| (7) Below subsistence level | Some farm families, unattached widows, orphans, beggars, disabled, unskilled day labourers prisoners | 28% |

Figure 4.1. Friesen economic scale (2004), adapted from Scheffler (2011).

In a world characterized by multiple and contradictory indicators of social status, Friesen suggests a poverty scale that eliminates the glaring inaccuracies of a wealthy-poor dichotomy and is sufficiently nuanced to be meaningful (Friesen 2004:331-337). The economic characteristics of urban areas are reflected in the PS1 through PS7 poverty scale, with the highest level of wealth at the top and the lowest level of poverty at the bottom. The top three have exceptional representations at various levels accounting for less than 3% of the total urban population¹²⁶:

The three levels of poverty, PS5-PS7, are characterized by those who are expected to consume between 1500 and 3000 calories per day, but are unable to do so, resulting

¹²⁶ That is 1.23 percent of the overall imperial population (Friesen 2004:340).

in chronic illness and malnutrition. This makes up 28 percent of urban dwellers, while those at PS6, who are slightly above the poverty line but may also fall below it, account for 40 percent (Friesen 2004:343-344). The characters in PS5 represent individuals who often feel confident in their capacity to meet their family's dietary requirements, while the characters in PS6 represent individuals who experience food insecurity (King 2019:165). The wealth and income of the various categories¹²⁷ give an insight into properly delineated demographic percentages of each category. When adapting Friesen's model, Longenecker introduces several changes, including the introduction of an economic scale instead of a poverty scale. His renaming of categories ES1 to ES7, disputes Friesen's percentage estimates, and proposes a strong 'middle class' in the ancient world (Longenecker 2009:264). In a typical Greco-Roman town, only 3% of the population is considered wealthy; 15% have a small surplus; 57% are living above the poverty line; and 25% are living below the poverty line (Longenecker 2010). Rogers (2019) argues that more relevant to Luke's story and the audience, is the assessment of 'possessions and behaviours' as socio-economic indicators. More recently, Friesen and Scheidel (2009) adopted a moderate position. They reject the pessimistic interpretation of a monolithic hierarchy of the wealthy and the poor with a vast economic disparity between them, as well as a relatively conservative estimation of the total income of Rome. The Friesen-Scheidel scale consists of three-models, with sixteen tiers that exemplifies the income distribution in the second century and provides two estimates of income distribution. One is optimistic and the other pessimistic, while measuring the entire imperial population and economy based on consumption, income, and GDP (Friesen & Scheidel 2009:62-63). Longenecker (2010:47,53) praised Friesen and Scheidel's scale as a "work of scholarship" from beginning to end, which allowed for more precise discussions on economic distribution. Longenecker subsequently revised his over-optimistic ES4 data projections by transferring 2% of city population data from ES4 to ES5, while keeping the remainder of his data.

The existence of a society in which most of the population (65-82 %), lives at or below the poverty line results from the incorporation of Scheidel data into the economic scale of Friesen and Longenecker (King 2019:169). The trend demonstrates that 1.15%

¹²⁷ For more on the wealth and income gap of the 7 categories see Duncan-Jones (1982) and Stegemann and Stegemann (1999).

1.66% were genuinely affluent, while 65% to 82% of those living in ES6 and ES7 were struggling to make a living, and 16% to 24% lived in ES4 and ES5 but were not financially well-off enough to influence local politics (King 2019:169).

| Economic Scale Levels | Friesen 2004 Urban Percentages | Longenecker 2009 Urban Percentages | Longenecker 2010 Urban Percentages | Scheidel-Friesen Pessimistic Empire % | Scheidel-Friesen Optimistic Empire % |
|-----------------------|--------------------------------|------------------------------------|------------------------------------|---------------------------------------|--------------------------------------|
| ES1 | 0.04 | 3 | 3 | 0.018 | 0.015 |
| ES2 | 1 | | | 0.14 | 0.13 |
| ES3 | 1.76 | | | 1.5 | 1.1 |
| ES4 | 7 | 17 | 15 | 6 | 12 |
| ES5 | 22 | 25 | 27 | 10 | 22 |
| ES6 | 40 | 30 | 30 | 60 | 55 |
| ES7 | 28 | 25 | 25 | 22 | 10 |

Figure 4.2 Comparative population percentages using the Friesen-Longenecker EconomyScale¹²⁸

| | Percentages of Typical Urban Population (2010) | Percentages for an Urban Christ-Group |
|-------|--|--|
| ES1-3 | 3% - Very Wealthy | 0% |
| 4 | 15% - Some Wealth; Moderate Surplus | 10% (one family; one artisan) |
| ES5 | 27% - Middling; Some Surplus | 25% (two families; two artisans; one merchant) |
| ES6 | 30% - Poor | 65% (4 families; 5 slaves of above families) |
| ES7 | 25% - Very Poor | |

Figure 4.3. Longenecker's Economy Scales and Description of Potential Number of Christ-group Members (see Rogers 2019:37).

The existence or lack of a middle class, rather than the relative positions of the rich and the poor, is at the focus of the academic argument on how to model social class in ancient Rome (King 2029:161). Rostovtzeff (1957) interprets proto-capitalist society and market economies as existing in the past and invokes Marxist terms¹²⁹ such as bourgeoisie and proletariat in the past. The distinction between the wealthy and the poor, and the lack of a substantial middle class, concern Finley¹³⁰ (1999), without using class-based terms, which he considers to be dangerously anachronistic. In ancient Roman society, a formidable middle class existed, that was characterized by

¹²⁸ Adapted from King (2019:168). As indicated King reads the Friesen-Scheidel dataset into the Friesen-Longenecker economic scale adapting the data in the former to suit the latter (see King 2019:169, footnote 328).

¹²⁹ Grant (2004) employs the same criterion.

¹³⁰ Duncan-Jones (1982; 1994), and Garnsey & Saller (1987) also follow this trend.

entrepreneurial, self-reliant, and upwardly mobile individuals, like the modern middle class (Mayer 2012). The Roman economy was something in-between Finley's primitive economy and Rostovtzeff's early form of capitalism (Harris 2011). Longenecker (2010), mindful of the Marxist terminology employed by Rostovtzeff, is cautiously optimistic about the existence of the middle class.

All empirical evidence indicates that the demographic classified by Luke as 'poor' constitutes a significant proportion of the populace, ranging from no less than 55 percent to as much as 82 percent. This is regardless of the data source employed or the geographic location of Luke's locality along the urban-rural spectrum (King 2019:171). Luke's portrayal of the poor is situated at ES7, with occasional representation at ES6, while in contrast, the rich are consistently depicted at ES1-ES3, with sporadic depictions at ES4 and intermittent appearances at ES5 (King 2019:171). This is despite the redefinition of socio-economic class distinctions within the Lukan context, and even when the scale is broadened to encompass cultural markers of social status such as honour and prestige in Roman society. Luke's viewership, along with the metropolitan populace in its entirety, would primarily consist of individuals who are barely able to survive or are just above the minimum level of subsistence (ES5-7), accounting for approximately 82% of the population (Rogers 2019:37).

4.6.1. Romanisation of Palestine

Archaeological investigations utilize tangible artifacts as a foundation for comprehending the socioeconomic milieu of Palestine during the first century. Conversely, New Testament scholars utilize techniques for modelling social science, resulting in two distinct methodologies that represent antithetical perspectives to examine the socioeconomic conditions of first-century Palestine. The archaeological approach suggests a thriving Galilee without any evidence of widespread poverty. This is contrary to the modelled depictions of Galilee, which depict the rural poor struggling under the pressure of the wealthy living in the metropolis (Luff 2019:145). Modelling inadequacies and the crucial requirement to pinpoint the insufficiency of information pertaining to taxation, monetization, and land tenure as the primary factors responsible for defective analyses of socio-economic phenomena have been emphasized (see Chancey 2011). In the realm of archaeological research, detecting poverty presents a challenge when human remains are absent. Nonetheless, the identification of wealth

is facilitated by the presence of material remains such as valuable artifacts and exceptional architectural and decorative features (Luff 2019:147). Luff (2019:182) laments the invisibility of the poor in the archaeological record due to archaeologists encountering challenges in devising definitive approaches towards detecting and comprehending the tangible manifestations of poverty. This is a result of the scarcity of personal possessions amongst the poor, and the absence of uniform methodologies crafted for detecting and quantifying poverty (Orser 2011:537).

Jeremias and Oakman utilized socioeconomic data to create a historical depiction of Galilee during the first century and to demonstrate the power dynamics present within a Jewish society of that time. Jeremias (1969) furthermore provides an in-depth analysis of the social and historical context of Jerusalem in the early 1st century. He gives a brief outline of the commerce, guilds, and economic status of the city's inhabitants, including the wealthy, the poor, and the middle class. The poor consisted primarily of slaves and scribes, as well as day labourers who were more numerous than slaves. Merchants were regarded as wealthy because they imported goods, while retail traders, caterers, and craftsmen who had their own establishments were regarded as middle-class people. They conducted their activities in a manner that was advantageous to the temples and their patrons (Jeremias 1969:100,102). Jeremias's work is widely referenced in the Lukan commentary scholarship.

Oakman (2018:97-105) integrates abstract socio-economic ideas into the lived experiences of Jesus' early followers by utilizing a materialist methodology to elucidate the power dynamic. He employs concepts of limited good, honour, and the cultural ethos of the ancient Mediterranean to build a methodological lens that depicts the historical figures within their social dynamics. This contrasts with Western, capitalist analysis from urban centres emphasizing the larger Greco-Roman societal structure, particularly the imperial presence of tax collectors and local elites (Oakman 2008:1-8). This helps to develop models on patronage, kinship, honour/shame, and agrarian life applicable to Luke (see Oakman 2008). Oakman (2008:164-180) further analyses the social and economic context of the first century AD by applying the definition and notion of the contemporary peasantry to the historical context of the text. While asserting that Jesus and his successors were Jewish peasants, he examines the power relations, such as the ownership of the production equipment, to gain an understanding of the

economic relationships which are based on patronage and the honour or dishonour of the hierarchical structure of the ancient Mediterranean society.

Luff (2019) juxtaposes the degree of affluence present in divergent Galilean, Gaulanitic, and Judean communities to apprehend the societal layers at play and to attain an insightful understanding of the sites of authentic opulence and influence in Palestine. According to Luff, first-century Galilee did not exhibit a clear differentiation between urban and rural settlements. Evidence suggests that certain villages displayed urban characteristics through an array of building styles and adornments. However, the presence of tiered housing at locations such as Gamla, Yodefat, and Khirbet Qana is reflective of a definitive socioeconomic hierarchy.¹³¹ Magdala's dimensions, municipal infrastructure, and noteworthy piscatorial industry, which facilitated global commerce, indicate that it was inhabited by a prosperous upper class that surpassed Sepphoris and other locales in Galilee. This is evidenced by the magnitude and embellishment of their abodes, whilst the heterogeneity of industries such as olive oil production, flour milling, pottery, textiles, and glass directly refute the misconception that Galileans were solely agrarian peasants (Luff 2019:179). The Upper City of Jerusalem and Ramat Hanadiv, and the fortified manor houses, have revealed the opulent dwellings of the priestly aristocracy and upper echelons of Palestinian and Roman society. This provides conclusive evidence that Jerusalem and Mount Carmel were indeed the hub of luxury¹³², far surpassing Galilee (Luff 2019:180).

The substantial residences adorned with exceptional wall paintings and intricate mosaics, and owners enjoyed a wide selection of ornate tableware, both domestically produced and imported from Italy, Cyprus, and the Phoenician coast¹³³ (Luff 2019:180).

¹³¹ This is consistent with the Levantine/Palestinian dwelling typology described by Hirschfeld (1995). The owners of the grandiose and intricately designed houses were affiliated with the upper echelons of society, akin to the affluent populace present in Sepphoris, thereby suggesting that certain owners may have resided in Sepphoris (Luff 2019:179).

¹³² The act of raising cattle for domestic consumption, particularly to produce tender beef, at the manor house of Horvat 'Eleq (Ramat Hanadiv) is indicative of substantial wealth on the part of the proprietor, given that the land was not inherently conducive to such an undertaking. Most people ate vegetables and cereals, together with lamb, mutton, fish, chicken, poultry, eggs as protein staple (Luff 2019:180).

¹³³ Archaeological data, when combined with textual evidence, suggests that there was no notable economic disparity between the upper and lower classes in Galilee, in stark contrast to the wealthy inhabitants of Jerusalem, who utilized an array of disparate dining vessels sourced from Italy, Cyprus, and the Phoenician civilization (Luff 2019:185). Imposing towers were used as treasure storages in Ramat Hanadiv establishments, and significant riches, such as silver found corroded in pottery 2000

This presents a vast contrast with the unassuming tableware, consisting of basic serving bowls, a few small plates, and a couple of jugs in Galilee.

The origin of Roman rule in Palestine is depicted in literary sources as a combination of the three primary categories of wealth-poor, power-powerlessness, and foreign-native (Keddie 2019:1). According to Josephus, one of the causes of the destruction of the Jerusalem Temple during the First Jewish Uprising against Roman rule (66-74 CE) was social strife between the ruling classes, the wealthy, and the impoverished (Josephus, *B.J.* 7:260-261; see Goodman 1982: 417– 427; 1987:51– 75; 2002:16). Judaeen apocalyptic literature cautions the Judaeen elite against God's anger in the coming age for exploiting the labour and resources of the just (*Pss. Sol.* 4:1-25; 8:10-12; *1 En.* 46:4-8; 53:1-7; 62:1-63:12; *T. Mos.* 6-7A; see Keddie 2013; 2018). Lenski (1966) and Kautsky (1982) have noted the predatory, exploitative and extractive nature of the aristocratic class over the peasant majority in pre-industrial agrarian Palestine. The elites, closely linked to Roman authority and culture, and beneficiaries of Roman conquest are the gatekeepers through which Palestine becomes increasingly Romanized. This results in heightened class exploitation and the deterioration of the egalitarian fabric of subsistence-based societies (see McLaren 1998:127-178). The priestly elites, driven by political and economic self-interest, played a key role in facilitating Palestine's incorporation into the Roman Empire, both culturally and economically, while also safeguarding the religious customs of the Judaeans (Keddie 2019:152). The Jerusalemite priestly elite's affluent and land-owning families persevered in reaping benefits from their advantageous positions in the city's sacred economy¹³⁴ (Keddie 2019:174). The Temple's 'monumentalization' by Herod proved

years later, were discreetly concealed beneath the ground in the precincts of the high priests' residences situated in Jerusalem (see Luff 2019:180). It is also noteworthy that in the period leading up to the Jewish insurrection of 66 CE, it was the impoverished peasants who, spurred on by the radical economic rhetoric espoused by the Judean leaders, rebelled against the ruling class, while the Galilean populace, devoid of such stratification, lent their backing to the elites, thereby exacerbating the socioeconomic disparities that existed between these two regions (see Josephus, *J.W.* 2.425-441; 4:183-241, 327, 335-336, 364-365; 5 :440-441; Josephus, *A.J.* 20:214; see Root 2014:32).

¹³⁴ According to the *Testament of Moses*, which was recorded in Greek between 6 and 30 CE, this prompted vehement denunciation. The Latin palimpsest preserved in the 6th/7th century reads: 'And pestilent and impious men will rule (*regnabunt*) over them [i.e., God's people], who proclaim themselves to be righteous. And they will excite their wrathful souls; they will be deceitful men, self-complacent, hypocrites in all their dealings, and who love to have banquets each hour of the day, devourers, gluttons, [about seven lines missing] destroying ... who eat the goods of the poor 109 (*rum bonorum comestores*), saying they do this out of compassion ... destroyers, complainers, liars, hiding themselves lest they be recognized as impious, full of crime and iniquity, from sunrise to sunset saying: "Let us have

advantageous to the priestly elites of Jerusalem, as it transformed the city into a flourishing pilgrimage destination. This facilitated the elites' accrual of greater political and ideological influence within the sacred economy of the city through their enfranchisement in civic offices, and economic power through the collection of tithes and temple taxes¹³⁵ (Keddie 2019:153). During festival times, there was a substantial influx of Jews to Jerusalem from both inside and outside of Palestine. This resulted in the purchase of sacrificial animals and the use of the service industries by pilgrims generating a significant amount of money for the Jewish aristocracy, especially the high priesthood, overseeing the festival operations. Additional animals were transported from as far away as Transjordan and Arabia because the local supplies of sheep and goats for Temple sacrifices were insufficient (Luff 2019:180). Rome treated high priests like a dynasty, punishing or rewarding their allegiance like Roman magistrates. This naturalized inequality in the temple as Palestine was assimilated as a Roman Province, whilst the high priests enjoyed political franchise as was the practice in other Roman provinces (Gordon 1990:241).

Temple wealth swelled to unprecedented proportions during the early Roman period, even though the Jerusalem temple has always been a strategic economic hub (Keddie 2019:165). Judaeen wealth was generally kept at the Temple (Josephus, B.J. 6:282). Just as in other contexts, the Palestinian Jewish elite had financial resources and a taste for luxury goods that they were familiar with from other regions of the Mediterranean¹³⁶ (see Keddie 2019). Zangenberg (2010:482) contemplates the hypothetical scenario of a rise in population and settlements in the presence of extreme poverty. This raises the possibility of ameliorating such poverty through the utilization of affluent resources, such as the provision of employment opportunities for the construction of residential and public edifices. Keddie (2019:7) concludes that the benefit to a broader population was undermined by elite comparative advantage in

luxurious seats at the table (*discubitiones et luxuriam*), let us eat and drink. And let us act as if we are distinguished leaders." And their hands and minds will deal with impurities, and their mouth will speak enormities, saying in addition to all this: "Keep off, do not touch me, lest you pollute me" (*Keddie's Latin translation* T. Mos. 7:3-10; see Keddie 2019:175).

¹³⁵ Herod's reign saw the Jerusalem Temple develop into a significant hub of Judaeen pilgrimage, so its economics included much more than just donations and offerings (Goodman 1999).

¹³⁶ An example is with the archaeological discoveries of Eastern Terra Sigillata tableware (Parker 1992:1023; Lewit 2011) and Zooarchaeological discoveries indicating that fish transported from the Mediterranean Sea, Red Sea, and Nile River was consumed by Jerusalem's elite (Horwitz & Lerna 2010; Bouchnick 2010)

terms of cultural and economic transformation in early Roman Palestine, as evidenced by elites' disproportionate advantage in trade and commerce relative to non-elites. The escalation in populace and/or economic activity does not invariably lead to a surge in material prosperity for the ordinary individual (Mattila 2013:110).

According to Josephus¹³⁷, in the Dead Sea Scrolls, and other apocalyptic writings¹³⁸, there exists compelling evidence to support the notion that the inhabitants of Palestine in the first century were discontented (Luff 2019:31). A fundamental association can be discerned between the economic circumstances of the poor and their capacity to secure fundamental means of subsistence and customary nourishment, as well as the degree of dissatisfaction within pre-modern societies (Luff 2019:181). This is contrary to Jensen (2006:178, 246) who suggests that all people reaped the rewards of the rapid economic development throughout the region. This is evidenced by the significant growth of the number of settlements in Galilee during and after the Hasmonean period, particularly during the time of the Herodian dynasty.

Because of the assimilation of Palestine into Rome's administrative and cultural framework, the ruling classes wielded disproportionate authority over civil and regional finances. This was done by means of the founding of organizations under elite control and the creation of patronage networks, exerting power over fiscal, public, administrative, and cultural resources (Keddie 2019:16). The core of the Judaeen aristocracy became a select group of affluent landowners with a measure of political autonomy. They subsequently emerged as the *nouveau riche* of Early Roman Palestine, as a direct consequence of the transformative, novel urban governmental system that was instituted in Palestine by Pompey, favouring city-dwellers (A.J. 4:223; see Keddie 2019:16). Herod played an important role in ushering elites out of exile and gifting them land, thus initiating the rise of a new generation of elite landlords. These held considerable sway over socio-economic relationships and were supported by

¹³⁷ Josephus narrates a tumultuous insurrection occurring in Judea and Galilee, resulting in a merciless Roman intervention that involved the destruction of towns, such as Sepphoris located in Galilee, the demolition of villages, and the subjugation of numerous individuals through enslavement and crucifixion (Josephus, J.W. 2.68-69; J.A. 17.289; see Luff 2019:13).

¹³⁸ The Dead Sea scrolls are replete with Messianic and apocalyptic nuances signifying a community longing for a messianic delivering figure and/or the ending of time heralding new socio-economic and political realities. The *Psalms of Solomon*, scribed during the initial century BCE, also denounce individuals who partook in the Roman invasion and articulate their profound despondency and fury towards Pompey, characterizing him as a dragon (*PSS. Sol.* 25; see Luff 2019:12).

legitimate administrative institutions that provided them with a privileged position from which to pursue their own objectives as collectives¹³⁹ (Keddie 2019:17). Herod is widely regarded as the most vengeful ruler in recorded history. He ruthlessly appropriated the resources of Judea for the benefit of foreign nations during his reign, which was characterized by the destruction of numerous cities (Josephus, *J.W.* 2.85; see Welch 1996:74-83).

The process of Romanization in Palestine served as a catalyst for the advancement of urbanization. It ushered in a novel manifestation of imperialist exploitation that resulted in economic inequality which was perpetrated by the imperial centre, and which gave rise to consumer-based cities that systematically impoverished rural producers, in turn benefitting urban elites¹⁴⁰ (see, *inter alia*, Horsley 1996:43-65, 107-30; Horsley 2014:37-8; Crossan 1999; Hanson & Oakman 2008: 93-122, and Oakman 2013). Early Roman Palestinian urbanization is thus a propaganda term for Roman imperial parasitism.¹⁴¹ Moreland (2004) disputes the assertions regarding parasitic urban-rural connections, claiming lack of support because of the dearth of textual attestations concerning significant peasant uprisings and natural calamities. He cites, the nonexistence of fortifications, and the absence of considerable affluence in either Tiberias or Sepphoris, as indicated by archaeological evidence. The presence of urban characteristics in certain archaeologically identified villages, and the manifestation of social stratification through ostentatious displays of wealth that accentuated class distinctions challenge the notion of a clear-cut urban-rural dichotomy (Reed 2007:405).

During the Early Roman period, the displacement of Jewish farmers from their inherited land led to the emergence of a landless proletariat that encountered difficulties in securing employment as tenants or day labourers. This gave rise to a burgeoning Jewish agricultural proletariat that continued to grow as a direct outcome of Pompey's conquest (Applebaum 1977, also in Horsley & Hanson 1985:58-59; Oakman 1986:44).

¹³⁹ It is unlikely that the ordinary people did not suffer as a result of the elite benefiting from urban development as claimed by Keddie.

¹⁴⁰ Keddie (2019) agrees that the establishment and reestablishment of urban centres facilitated the promotion of the ruling class in terms of both political influence and economic prosperity throughout the initial period of Roman dominance, thereby preserving and transforming enduring systems of disparity, but denies their economic impact on agrarian producers and farmers.

¹⁴¹ Weberian classical theory has aptly argued this point as initially demonstrated. The argument is sustained by Finley (1981) and Peacock (1982) amongst others.

The emergence and exploitation of a category of underemployed non-slave laborers can be attributed to the transformative expansion of large estates. This led to a shift in production from small-scale polycropping, which aimed at satisfying local demand, to large-scale monoculture, which targeted exporting high-value crops (Kloppenborg 2008:60).

The farm tenancy practice has a profound historical background that precedes the early first century Common Era. It first posed a challenge to the egalitarian Israelite inclination toward smallholdings during the Seleucid dynasty in Roman Palestine, and ultimately leading to its demise amidst Roman imperial economic parasitism (Kloppenborg 2006, 284-295; 2008:32-50). The Hellenistic presence proved to be a significant disturbance to the harmonious way of life adopted by the agrarian inhabitants of post-exilic Palestine. These partook in a perpetual cycle of sowing and reaping in reverence to God, while relying on their own physical labour and familial support, including their offspring and extended kin, for subsistence and in times of exigency (Fiensy 1991:21). However, the advent of tenancy into Palestine during the Early Roman era had a deleterious impact on the Judaeen farmers and labourers. These were predominantly affected by the resultant exacerbation of exploitative conditions, leading to the creation of a new proletariat (see Kloppenborg 2006; 2008). The peasantry (tenant and wage labourer) situation was further worsened by the transfer of royal land to private land. This favoured imperial powers and the elites whilst placing the welfare of the peasants in jeopardy (Parássoglou 1978:4) The dynamic between landlord and tenant within the patron-client relationship was inherently unequal, with the scales of influence tipping in favour of the landowner (Schwartz 1994).

Evidence suggests that the acquisition of land by the Herodian and priestly aristocracy was prompted by the fact that a substantial proportion of farmers in Judea had incurred debts. This arose as a result of borrowing funds from affluent individuals to withstand the repercussions of poor harvests (Goodman 1987:51-75; Luff 2019:46-47). The rapid expansion of a class of peasants without land was attributed to their indebtedness (Oakman 1986:72-76, 149-155; 2008:11-42). The presence of social unrest, banditry, and the emergence of popular resistance movements, some of which were focused on

the end-of-the-world in Palestine, was attributed significantly to the inequality caused by debt (Horsley 1989:88-90; 1993:246; 2014:37-38; Horsley & Hanson 1985:58-63).

To persuade debtors to align with their cause, regardless of the consequences for their creditors, the rebels set fire to the archives¹⁴² in Jerusalem during the First Revolt, as detailed by Josephus (Josephus, *B.J.* 2:427; see Goodman 1982:417-427; 1987:51-75; 2002:16). Dissatisfied sentiments regarding indebtedness, and imbalanced allocation of resources served as an impetus for certain insurgents to engage in targeted incineration of debt receipts (Goodman 1987). The ongoing environmental risk of drought further jeopardized the likelihood of a successful harvest, thus posing a disproportionate risk to tenants and other loan borrowers. It placed their entire property (or that of a guarantor) as collateral for the loan at risk of seizure or imprisonment, or debt slavery, by the major creditors¹⁴³ (Keddie 2019:103). The fact that most private landowners during the Early Roman period were native aristocrats who resided in urban centres and often held a certain level of political power is commonly acknowledged and indisputable¹⁴⁴ (Keddie 2019:110).

Elevated, oppressive, and exploitative taxation imposed by the imperial centre in Early Roman Palestine was another burden borne by the peasant majority (Horsley & Hanson 1985: 52-63; Hanson & Oakman 2008:105-108). The tumultuous transition from republic to empire spanned Pompey's conquest to the Augustan period of Herod's reign. During this time, the Early Roman provinces and client kingdoms were plagued by taxes that were both erratic and oppressive in nature (Sullivan 1990; Harris 2013; Scheidel 2015; see Keddie 2019). Such taxation posed a burden on individuals residing in close proximity to or below the subsistence level. Most forms of taxation adhered to regressive rates and bestowed exemptions or discounts solely to local elites

¹⁴² The archive belonging to the debtors in Jerusalem was demolished because of the Judean populace's dissatisfaction with the affluent Judean upper class, which had amassed even greater wealth by seizing land obtained in lieu of the indebtedness of farmers who were unable to repay their loans due to poor harvests (see Goodman 1982:417-427; 1987:51-75; 2002:16).

¹⁴³All of the borrower's private property was pledged as security for a loan, according to promissory notes. P.Mur. 18 (55/ 56 CE), that were discovered among the records from the Judaeian wilderness, reads: "[T]he payment from my property and from whatever I shall buy according to that". This demonstrates that not only present property, but also anything that the borrower might acquire in the future, could be seized by the lender if the loan was not repaid (see P.Mur. 18, ll. 7–8, transl. in Cotton & Yardeni 1997:290)

¹⁴⁴ Keddie (2019:110) notes that the local elites benefitted from Herod's Roman imperial land regime, that gifted previous royal land into private property through patronage networks.

of the province, giving them preferential treatment not accessible to non-elites. Certain elites moreover enjoyed the added advantage of overseeing the administration of specific taxes and market supervision (Keddie 2019:112).

During the periods of direct Roman rule, certain elites acquired political and material resources through state taxation, enjoying the Roman inclination to have local elites represent Roman interests in the provinces. Priestly elites who exercised significant control over the exaction and distribution of revenue from diverse sources also benefited from the Judaeian ideology that views supporting the Temple and its priests as a divinely ordained obligation. Overall, both elites derived benefits from the inefficiency of the Roman government (Keddie 2019:112). These elites, acting as intermediaries and unintended beneficiaries of Roman direct taxation, enjoyed advantageous tax rates, while the priestly elites in Jerusalem, who also derived revenue from tithes, expanded their wealth and power¹⁴⁵ (see Keddie 2019:128-129).

There exists compelling evidence that the priesthood, who possessed vast amounts of land constituted a substantial faction of the Judean upper class (Luff 2019:185, 170). They presumably augmented their affluence through the exorbitantly profitable yearly Temple levy and the thriving pilgrimage enterprise, spearheaded by Herod the Great. Upholding their traditional Judean allegiance, the priestly aristocracy in Jerusalem exhibited a marked preoccupation with augmenting their own affluence and sway. This is manifest in their participation in the delimitation of proprietary entitlements, the curtailment of their personal transactional levies, and the exploitation of the transactional levies imposed upon other devotees (Keddie 2019:152-153).

The tax burden was so heavy that Judaeans had to petition Tiberius for relief in 17CE¹⁴⁶ (Oakman 1986:68). The privileged rates accorded to elite landowners were a manifestation of their entitlement, with the tariffs fluctuating from region to region based on the extent of privilege or deprivation (Duncan-Jones 1994:52; also in Jördens 2012b).

¹⁴⁵ Judaeian elites would have benefitted from the same tax discounts as the Egyptian elites (see Jördens 2012a:60; 2012b; Monson 2012).

¹⁴⁶ Tacitus writes in *Annales* 2.42.5: "And the provinces of Syria and Judaea, too, exhausted by their burdens, implored a reduction of tribute" (*et provinciae Syria atque Iudaea, fessae oneribus, diminutionem tributi orabant*; see Oakman 1986:68).

Whilst entrusted with the pivotal responsibility of acquiring tolls and duties, tax collectors also resorted to the utilization of administrative fees as an ancillary strategy to enhance their revenue, lacking any concentrated endeavour towards the establishment of uniform rates¹⁴⁷ (Bang 2008:205). Members of the high priestly families who formed part of the local elite were largely tax collectors of Judean culture, particularly in Jerusalem. These held considerable influence over the economic affairs of non-elites and utilized their civic positions to elevate their status and increase their income and prestige (Keddie 2019:141).

Archaeological evidence demonstrates that the high priesthood had a predilection for the Graeco-Roman mode of architectural construction, interior ornamentation, and culinary practices, and resided in lavish abodes with a panoramic view of the Temple (Luff 2019:185). Galilean tax collectors were prominent members of the community who served as contractors in urban and administrative centres, enjoying a consistent level of income beyond mere subsistence. They also held tax-farming agreements that allowed them to accumulate significant wealth and cultivate a diverse clientele, thereby yielding considerable political influence¹⁴⁸ (Keddie 2019:142). As exemplified by Herod Agrippa, the application of weight-measuring also served as a political springboard for Judaeen regional leaders in conjunction with tax collections. This enabled them to revive their political careers and accumulate substantial wealth (Josephus, *A.J.* 18:147-50; see Schwartz 1994:46-49). Elites oversaw the economic exchange processes, as mentioned by the measuring weights discovered in the Jewish Quarter mansions in Jerusalem¹⁴⁹ (Reich 2006:371-373; Kletter 2015:190-197). The institutional changes entailed a reorientation of the ruling class that ensured them greater authority over resources. This resulted in the elite amassing wealth and influence through the process of taxation and beneficence, which had previously been

¹⁴⁷ The lack of standardization gave them discretion to determine the value of goods (Bang 2008:205).

¹⁴⁸ Josephus recounts the actions of one tax collector John in Caesarea Maritima one of the powerful leaders of the Judaeen credited with bribing the procurator Florus with the incredible sum of eight talents to hinder a construction project allegedly initiated to make synagogue gatherings more difficult for Judaeans (Josephus, *B.J.* 2:287–92; see Keddie 2019:142).

¹⁴⁹ These weights raise important issues that have not yet been answered, but they hint at a fascinating relationship between Jerusalem's elites and economic control over its markets (Keddie 2019:150).

beyond their reach, as both direct and indirect taxation had been controlled by local elites (Keddie 2019:151).

A preindustrial hierarchical society similar to that of Galilee would likely have harboured a substantial portion of impoverished individuals, despite indications from both literary and archaeological sources that the Judeans were probably experiencing even greater hardships during the time of Jesus, in contrast to their discontented Galilean counterparts (Luff 2019:186).

4.7. CONCLUSION

It is apparent that the Roman imperial economy was not favourable to the poor by any measure or standard. Rather, the economy was skewed to favour the elite whilst disenfranchising the poor, despite opposing arguments. This is true of both the Lukan narrative world and the social location within which Luke was read. Exegeting the socio-economic and political context of these world(s) makes Luke's radical message of 'good news to the poor' and 'wealth renunciation' apprehensible. This is critical to the application of the Lukan message in the post-apartheid situation in South Africa, which is the focus of the penultimate and final chapters.

Chapter 5

Traces of the colonial, apartheid, and post-apartheid South African economy

Awakening on Friday morning, June 20, 1913, the South African native¹⁵⁰ found himself, not actually a slave, but a pariah in the land of his birth (Sol Plaatje's political tract 'Native life in South Africa: Past and present')

5.1 EUROPEAN IMPERIAL EXPANSIONIST PROJECT: DISPOSSESSION, SERVITUDE, AND DEHUMANISATION

5.1.1. Territorial dispossession of Africa's land

The great catalyst for giving impetus to Africa's colonization was spurred on by sibling rivalry and jealousy between the Belgian king Leopold over his cousin Victoria, queen of England and the Empress of India and their vast imperial territory. Leopold had cunningly acquired the "Congo Free State" under the guise of a humanitarian and abolitionist agenda, outmanoeuvring his European counterparts. Nevertheless, they soon caught up with his treachery, with France edging to the North and Portugal through British influence, moving to the South to prevent Leopold's ambitious project to conquer the Congo region. The European Scramble for Africa prompted German Chancellor Otto von Bismarck to invite European leaders to the 1884 Berlin conference to draft a colonial expansionist policy for Africa's colonization. The conference meeting in Berlin (at Portugal's behest) with delegates of Western powers in 1884-1885, had Africa's subjugation as the primary agenda (Oliver & Oliver 2017:1).

The "*Scramble for Africa*" conference climaxed the jostling for control of African territory by all competing countries (see Pakenham 1991). Since the Berlin conference, which began on November 15, 1884, the notion of "effective occupation" was established into law. Thus, Europe's conception of Africa was cemented in Germany rather than in Africa (Ngcukaitobi 2018:24). The Berlin conference settled Leopold's territorial claim to some parts of Africa, and the countering nations' claim likewise, and set out a

¹⁵⁰ This refers to people of African descent in this study. That is the indigenous peoples, that is, Khoekhoe and the San peoples ('Khoisan') in all their tribes and clans, and the Bantu-speaking people of South Africa i.e., Nguni, Sotho, Venda, Tsonga/Shangaan, and Tswana etc., in all their tribes and clans. Where necessary I refer to the specific tribe involved of these native South African peoples in every epoch during the colonial and apartheid era. Together, they are referred as Black people or Africans in this study.

process of Africa's annexure and claim by European colonizers, as promulgated in the Berlin Act, so-called. In 1884, the nation-state constitution of Europe supplanted the loosely connected independent tribal political units and polities known as African "states". Any European state that could prove effective occupation of an African area was regarded as the proper owner of that region (Ngcukaitobi 2018:24).

Europe's global history records its primitive accumulation and the transformation of land rights (physical removal from ancestral or tribal land). The violent expropriation of non-European lands and resources comprised the severing of indigenous populations from the land, and the alienation of their traditional (communal or tribal) rights to use the land through either massacre (white settlements) or slavery (Araghi & Karides 2012:2). African resources, and effectively all her sons and daughters, were put under Europe's control, with superficial borders (often separating families) imposed by Europe (see Ngcukaitobi 2018:24). It is impossible in law to classify nomadic tribes as abandoned in regions where they are organized politically and socially (International Criminal Justice Court, 1975:39).

By arguing that only cultivation was an appropriate occupation of land, European colonizers borrowed philosophy and political science writings of the eighteenth century to justify their claims (Gilbert 2007:688). Emer De Vattel, a French jurist, and other European intellectuals claimed that Europeans had the right to take land from barbaric black tribes however long they have occupied it, as part of Europe's preserve; these lands were rendered unoccupied by early European company owners (see Dorsett 1998:281). According to the "agricultural argument", indigenous people who did not cultivate the land they inhabited could not assert that they had legal title to that land. Hence European settlers who did cultivate the ground and built structures there could disregard the native peoples' occupation of the area (Gilbert 2007: 685-686). Families, clans, and communities were divided in half by arbitrary frontiers, as borders between and within African states were drawn to accommodate European colonial goals, which also imposed foreign languages across the continent (Ngcukaitobi 2018:25).

The Berlin conference presented Africa as a free-for-all territory, through legal violence against Africa and her people (Jordan 1997; Getz n.d.). The unilateral partition of the world into the Northern and Southern hemispheres and amity lines through legal agreements and divisions was enacted by European countries and exported to the rest

of the world (Schmitt 2006:86-99). The objective of colonization, according to colonists, was to “civilise the uncivilised” and spread the great institutions and ideas of the West to the rest of the globe (Farkash 2015:3). This propagandist myth was an effort to hide their plans to invade other countries whilst enabling the theft of foreign resources to support and boost their domestic economies (Kunnie 2000:3). These myths of moral, physical, and racial superiority that white colonists told themselves over time, against the alleged barbarism of the people they were cruelly exploiting, enslaving, and colonizing for their economic profit, came to be described as the essence of European culture (Farkash 2015:3-4).

By colonizing and conquering the so-called New World (which was in essence the Old World of the native inhabitants), European incursions were justified under the pretence of bringing the highest level of rationality and superior human faculties to the local populace. In reality, they only served to strengthen Europe, or the Old World, into a position of global dominance (see Anghie 2004:17–18; Delport & Lephakga 2016:2). Therefore, the world was divided between a “periphery” and a “centre”, with the old conquering nations of Europe serving as the centre (Dussel, et al. 1985:1-9). Europeans were seen as given the heavenly gift of scientific supremacy and governance over the Africans, who were brutal and uncultured, deserving no respect since they were uncivilised (Tanyanyiwa 2011:49-50). Accordingly, this duality between the cultured colonizer and the primitive colonized characterizes much of imperial and colonial historiography (Cooper 1994).

Europe divided the world along the Greek Hellenistic hierarchy and social divisions in which the totalising all-encompassing concept of *Being* is only found in the Graeco-Roman city, with the rest viewed as uncivilised *non-Being* (Dussel, et al. 1985:5-6, *emphasis mine*). This Greek construction of the world granted as pride of place men, children, and women born in noble families, with slaves outside consideration of being human and only existing as slaves. Greek construction and understanding of Being, required slavery as part of totalizing image of Greek Being (Dussel, et al. 1985:1-9; Lephakga 2015:151–156; also in Aristotle 1962:25-40; Hansen 1992:129-160; Hunt 2002:1-19; Scheidel 2008:1-25; see Delport & Lephakga 2016:2). Plato’s *The Republic* (2007) exemplifies the hierarchical nature of Greek thought, encapsulating the foundational Western thinking that society must be split into several spheres and

classes for it to operate at its peak and strive toward a world of form. Greek men were regarded as thinking beings with true capabilities of reason and speciality of noble reasoning, having the natural status of being defenders of society's lowest class, and making political decision-making their only preserve (Delpont and Lephakga 2016:3).

Slaves, on the other hand, were doomed by their past, family history, and accident of birth to their occupied place, permanently chained to their function as emotion-driven, submissive beings who lacked intelligence (Dussel, et al. 1985:1-9; Lephakga 2015:151-156). Colonization was thus fuelled by the totalizing epistemological foundation of Being in Greek society, transferred as European, and creating hierarchies of existence that served as a moral justification for settlement (Dussel, et al. 1985:3-8; Delpont & Lephakga 2016:3). Due to the global division into "centre and the periphery", Graeco-Roman culture was consequently transported and idealized to institutionalize the self-imposed superiority of the centre (Delpont & Lephakga 2016:3). Necessarily, the establishment of Europe as the centre, required the appropriation of non-European land as an imperative (see Schmitt 2006).

The so-called "age of discovery" was conducted with the intention of eradicating Europe's enemies, that is, those living in the so-called "New World". Land thus became a major issue of contention in a struggle for space between the conqueror and the conquered (see Dussel, et al. 1985:1; Delpont & Lephakga 2016:3). Thus, maritime trade and the creation of the modern world are at the root of empires' histories, and in South Africa, a lengthy history of empires gradually developed the grammars of belonging, with the Cape at their heart (Mkhize 2015:7).

This started a process of Africa's exploration by Europeans, with the aim of securing protected European owned states in African local territories, enshrined in binding treaties with the local people. Often written in their foreign languages, or signed with illegitimate local personas, these treaties were mostly meaningless, only serving the propagandist racist notion of *terra nullius*¹⁵¹, claiming native occupied land as legally unoccupied or uninhabited.

¹⁵¹ Yanou (2006:179) notes that some unconvincingly argue that the land taken in South Africa was unoccupied. This is an excuse by those who gained from it and now oppose its return. These theories are based on the erroneous presumption that South Africa was a vacant territory inhabited solely by a

5.1.2. Historical lens(es)

In the past, historical accounts of South Africa have been categorised into five main groups or historical schools: liberal, Afrikaner nationalist, settler or colonialist, and revisionist or radical (Visser 2004:1). Cory (1965) is a prime example of early attempts at a Eurocentric partial or complete presentation of South African history, publishing six volumes on the *Rise of South Africa* between 1910 and 1939 (Alexander 2002:9). Cory placed British colonists at the centre of the history of the Cape's districts and saw history from the perspective of white colonists (Visser 2004:2). The perspective of the native Africans has often been ignored by earliest historians who privileged European viewpoints of the colony's history, giving the Afrikaners and white communities a significant and essential position in South Africa's history (Alexander 2002:10). This is akin to "intellectual imperialism" in the same vein as political and economic imperialism in the global political economy (Alatas 2000:53).

A key feature in the history of imperialism has been its need to control public opinion through public narrative and discourse. Intellectual projects like the starting of schools and universities in colonies engendered intellectual imperialism (Alatas 2000). Colonies served as enormous data banks, repositories for information and basic facts that were sent to the governing nation, just like they once did for raw resources that were exported to the same nations (Hountondji 1990:8). The propensity for former colonies to rely on concepts, practices, norms, and objectives established by their former colonizers breeds academic dependency (Garreau 1985:114-115). The Eurocentric view of South African history, just like the colonial economy, only serves the interests of the ruling colonizers and their native countries and people's consumption needs (see Hountondji 1990:8). It results in "intellectual bondage", conditioning the native mind to western thoughts and ideas, making it oblivious to indigenous knowledge systems and solutions geared to indigenous issues (Altbach 1978; see Alatas 2006:37). The African people's sense of self and pride in their institutions and practises are seriously affected by this dependence on information brought from the North (Mlambo (2007:18). Africa's contribution to knowledge

small number of Khoi and San communities until a relatively recent substantial incursion by purported Bantu or Nguni invaders originating from the northern region (see Mellet 2018 at <https://mg.co.za/article/2018-08-02-stop-calling-us-coloured-and-denying-us-our-diverse-african-identities/>).

generation is generally marginalized by the global academic community, making it susceptible to Western dependency (see Keim 2008:27). African knowledge and voices were purposefully ignored and silenced, which allowed the north to create and spread “truthful lies” about Africa. In Ake’s (1994) words, these were “imperialism disguised as scientific knowledge” and which portrayed colonialists as the continent’s saviours, pioneers, mentors, and arbiters (Tanyanyiwa 2011:37).

To refute “truthful lies” about Africa, it is crucial that knowledge of the continent is formed via African popular realities rather than through Eurocentric prisms (Mlambo 2007:18). A distinctly African contribution to global knowledge in theory and philosophy must breed an understanding of Africa’s image (Obi 2001). It is therefore appropriate to ask for the “indigenization, nationalisation, endogenous intellectual innovation, decolonization, globalisation, or sacralization of the social sciences” to challenge and transcend their Eurocentric and Orientalist foundations (Kim 1996). They compromise their own research to accommodate debates whose foundations and presumptions did not align with the pressing issues and concerns of their continents. They should instead develop and support alternative venues for their work that are more relevant to theory and practise and, consequently, to what Africans expect and aspire to (Olukoshi & Nyamnhoh 2007:57).

A balanced historical analysis of South Africa is therefore necessary. This is one that is “original, non-essentialist, counter-Eurocentric, and independent from the state as well as independent from other national or transnational groupings. It should be “sensitive to African historical experience and cultural practices and geared towards freeing the mind from the shackles of intellectual imperialism” (Tanyanyiwa 2011:19-20). The cultural, ideological, and political contexts in which knowledge is generated and packaged are so important (Mugambi 2000). Consequently, Africa’s vast knowledge import from other places might have dire consequences of forgetting own unique knowledge and not developing it enough (Mlambo 2007:18). Scientific advancement must therefore draw more broadly from the wealth of information about Africa created by Africans to help African communities rather than just satisfy individual egos (Mkandawire 1997:34). African memory must be at the centre of any conversation of historical memory in South Africa (Magubane 2000).

5.1.3. Race-class and liberal-Marxist historiographical debate

Traditional debates in South African historiography have pitted race against class, with the conservative approach overlapping with liberal-pluralistic explanations, and the Marxist approach emphasizing class as the main factual and theoretical construct (Tanyanyiwa 2011:50). The production of intellectual knowledge was often influenced by political and ideological considerations. The liberal perspective being to avoid the subject of race in favour of demonstrating how the apartheid system's features aided Afrikaner nationalists' political aspirations, with the dominant trend there being to become involved as non-racist activists (Hyslop *et al.* 2002:11-14). Liberal agitation for the repeal of discriminatory legislation has placed political and moral concerns—rather than economic ones—at its core, indicating over concern about racial relations in their perception of Black people's interests (Wright 1977:5).

Conflicting views of South African history result from the deliberate writing of early colonial histories to defend genocidal wars (Magubane 2000). Liberal history culminates in times of rapid development, industrialization and urbanization, and the emergence of the segregation system in the 1970s. This being characterized by a deterioration in the black standards of living and the stark contrast between flamboyant white lifestyle and abject poverty on the side of Blacks (Stasiulis 1980:463). With the notion of class excluded from the bourgeoisie's interpretation of the South African situation, liberals believed that race was the most important and determining factor determining the nature and substance of South African society (Tanyanyiwa 2011:55).

Marxist links to means of production, capital, or land ownership were irrelevant in South Africa, as race rather than social class was an important indicator of status (Van Den Berghe 1967:267). Liberals stuck to their liberal ideology and saw historical interaction between Blacks and Whites as the key (see Wilson & Thompson 1969-1971). The interaction between race, class, and other features of social difference and how these were reinforced or refuted in social action was ignored by liberal historians of the 1950s. Instead, they were obsessed with race in current politics and exaggerating the importance of race in the past (Tanyanyiwa 2011:58).

The liberal argument against Apartheid's segregationist and racial protectionist policies centred on their belief in the free market because they understood that markets, while

not working alone, worked better without state involvement (Nattrass 1991:658). According to Macmillan (1963) and De Kiewiet (1956), ideological, prejudicial, and discriminatory racial practices were detrimental to capital and economic growth. The racial domination system in South Africa was viewed as a dysfunction intruding economically into the capitalist system. It was thought that rational industrialism and colour-blind capitalism would eventually triumph over immaterial forces such as prejudice, racism and nationalism (Johnston 1976:1-2). They believed that apartheid created a conflict between economics and racial politics, systematizing and institutionalizing economically irrational racial prejudice (Wright 1977:12). This assumption was based on the belief that market strength would eventually triumph, collapsing Apartheid and guaranteeing the long-term demise of the capitalist economic system and racial dominance (Posel *et al.* 2001:v).

Responding to the interwar racial segregation policies of Smuts¹⁵² and Hertzog¹⁵³, the liberals reinterpreted history in terms of race relations and later pluralistic society, as second manufacturing industries were phased in and a skilled black labour force was required (see Walker 1928; De Kiewiet 1956; Macmillan 1963). However, the liberal methodology has been criticized as marginalist, and inadequate to answer questions relevant for the development of South Africa's economy (Tanyanyiwa 2011:58). The limited scope of marginalist theoretical tools for seamlessly functioning market economies limits their ability to provide a comprehensive understanding of the role that non-market factors have played in the emergence of capitalism (Nattrass 1991:662). Radicals claim that correlative alternate industrial developmental and racial prejudicial claims have not been given due consideration by the liberal scholars, since there is strong evidence that the two may in fact be harmoniously compatible (Wright 1997).

Since institutionalized racism cannot be considered a central structural factor behind the unequal distribution of these factors, the end of Apartheid, was insufficient in restoring fair access to resources and opportunities for the entire population (Tanyanyiwa 2011:59). This was demonstrated by Terreblanche (2002:xv), who concludes that, despite the transition to all-encompassing democracy, the post-apartheid era was characterized by persistent unequal power dynamics and socio-

¹⁵² Jan Smuts was the army general who led the Afrikaner troops during the Anglo-Boer war.

¹⁵³ Barry Hertzog was a soldier and prime minister of South Africa from 1924-1939 amongst others.

economic outcomes. Entrenched archaic forms of inequality became a defining feature perpetuated in society and surpassing previous levels. Understanding the structural position of the working class requires an acknowledgment of its racial identity, as the extreme exploitative and oppressive strategies are necessary for African workers to provide remarkably cheap labour for capitalist ends (Johnstone 1976:20). The contribution of racial divisions to explaining class differentiation makes the underlying differences between class and race in society to be structurally differentiated in South African society (Posel 1983). Liberal writers however usually ignore the relationship between race and class since the bourgeoisie benefited most from the framework of racial inequality, powerfully sustained politically and economically without undoing class conflicts. Liberal writers specifically ignored race and class duality, since the racially unequal structure primarily favoured the ruling-class who had political and economic power without fully eliminating class antagonisms (Magubane 2007:211).

According to Marxist scholars, at the core of historical materialism, a comprehensive theory of history is the idea of class and closely related concepts such as modes of production (Cohen 1978). Racist practices are seen in the Marxist interpretation as the hallmark of capitalism in South Africa and aim at subverting the liberal agenda with class and not race at the centre (Johnstone 1976:4). Social class is thus a determining factor in racial discrimination, which narrows the spectrum of all social phenomena, problems and conflicts into class issues and struggles in South Africa (Tanyanyiwa 2011:61). Van den Berghe (1967) also dismissed racism as an expression of false consciousness and claimed that class was the sole explanatory factor, while Legassick (1974) recognized the importance of racist ideology. Class disparities have always been more significant than racial distinctions in South African society, according to revisionists, even though they did admit that the two frequently coexist (Saunders 1988). Rather than being taken for granted as a matter of course for any analysis and account, as in liberal discourse, racist ideology and prejudice must be thoroughly examined and clarified as expressions resulting from class conflict (Davies 1979:3).

5.1.4. Colonialism in South Africa

South African land's history of theft and democratic restitution heralds the country's story (Sparks 2019:9). Land dispossession in South Africa has been an enduring consequence of colonialism and Apartheid for over three centuries, relating closely to

the country's history and the anti-Apartheid cause (Sparks 2019:5-6). Forces of land grabbing, exploitation, avarice, and dispossession are engaged in a perpetual battle over it (Wright 2004:81). Maxon (2018:3) further charges that progressive forces must advance the discussion and make a fundamental shift to give it closure by simply describing a programmatic strategy for meaningful land expropriation. A historical perspective of the interactions between various racial and ethnic groups in South Africa can benefit from an understanding of the context of the current arguments around the problem of land (Jankielsohn & Duvenhage 2018:4). The meaningful study of striving in South Africa must have both the colonial and Apartheid legacies and the democratic transition in focus (Sparks 2019:10).

The colonial project in South Africa is centred on empire, making colonialism and apartheid derive their meaning from empire as one of the most prevalent forms of racial government in Southern Africa in the twentieth century. However, historical scholarship ignores how the colonized people developed contrapuntal methods of reading and writing to cope with these conditions (Mkhize 2015:32). The centre and periphery chasm is crucial to understanding South Africa's history of conquest (Delport & Lephakga 2016:3). In this aspect, ideas that are specific to the context and cannot be changed originated from planners and professionals from the colonial era in the more powerful countries in the northern hemisphere. Values of countries such as the Netherlands, were imposed on the local context in South Africa with the assumption that they knew what the local population desired or required for their social, environmental, and economic progress. This was what the colonialists viewed as 'the burden of the white man', so-called (Miraftab 2011; see Corrado 2013). State racism and imperialism are interlocked in South Africa's history, making early 20th century historical thought to be viewed "imperially", that is, viewing national and imperial boundaries as pliable and extensible (Mkhize 2015:17).

South Africa has a long history of conflict, segregation, and discrimination towards indigenous peoples¹⁵⁴. This dates to the permanent settlement of European colonizers as they planted "bitter almond hedge" to divide Dutch settlers and the native population (Pienaar 2014:53). Understanding South Africa's history of colonization and alienation,

¹⁵⁴That is the Khoi, San, the Nama, the Korana, and the Griqua who occupied the Cape frontiers.

therefore, requires understanding world history and how it was divided throughout the conquest period of colonization (Delpont & Lephakga 2016:2).

The complexity of citizenship in South Africa is influenced by “the layered temporalities, or the afterlives” of imperialism and colonialism that South Africa as an empire has experienced¹⁵⁵ (Mkhize 2015:8). The several *durées* that make up a postcolony are comprised of “discontinuities, reversals, inertias, and swings that overlap, encircle, and interpenetrate one another” (Mbembe 2001:8). Despite being on the periphery of the empire, colonial spaces like South Africa contributed to the definition of some of the fundamental concepts of modernity (Mkhize 2015:15). The time when countries had a lot of power over others, called “classical or high imperialism”, still affects culture today (Said 1994:7).

South Africa’s history is linked to other powerful countries that have controlled or influenced its development over time (Mkhize 2015:17). For example, Araghi and Karides (2012:1) underscore four historical eras to categorize the intricate worldwide history of land rights commodification process as: primitive accumulation, colonialism, developmentalism, and globalization. In the case of South Africa, six successive regimes¹⁵⁶ deprived Africans of opportunities for human capital development, entrepreneurial and business acumen. These took away vast swaths of land they had successfully used for centuries to practice traditional farming Millions of Africans were paid unfair wages in all sectors of the economy for many years, and discriminatory laws were enforced that prevented them from acquiring new skills and made them perform monotonous, unskilled labour (Terreblanche 1997).

South Africa’s earliest towns were spatially controlled and residentially segregated in the embryonic colonial period (1652-1910). This encompassed geographical isolation,

¹⁵⁵ Thomas (2011) addresses the complexities of continuity of violence in post-colonial situations in Jamaica, a classic example the deviant culture of violence often blamed on the culture of poverty amongst black communities, whilst failing to implicate regimes of slavery, imperialism, colonialism, and apartheid for laying the “foundational repertoires” for these forms of violence (see Mkhize 2015).

¹⁵⁶ The six systemic periods in South African history according to Terreblanche are: 1. The systemic period of Dutch colonialism (1652-1800), 2. The systemic period of British colonialism (1800-1890), 3. The systemic period of the two Boer republics (1850-1900), 4. The systemic period of the British imperialism and the political economic hegemony of the British establishment (1890-1948), 5. The systemic period of the political hegemony of the Afrikaner establishment (1948-1994), 6. The hegemony of the African political establishment since 1994 (see Terreblanche 2002).

domineering politics and socio-economic legitimized exclusion to advance the systematic dispossession of the black masses in the period after Union and before apartheid (1910-1948). Segregation was finally institutionalized through legislation to spatially restructure urban areas in the apartheid period (1948-1990) (Strauss 2019:2).

The development of a purely new society of different races, colours, and cultural accomplishments is described in the authentic colonial history of South Africa. South Africa's history was created via battles over racial origins and the antagonism of varying social classes (De Kiewiet 1941:19). Ours is a history embedded in an era of "aggressive colonial expansion" characterized by "centuries of settler violence, economic exploitation and apartheid racism" (see Ngcukaitobi 2018).

5.2. THE CAPE FRONTIER

5.2.1. Early European encounter(s)

The Portuguese invasion of Southern Africa in 1488 met resistance and an early defeat at the hands of the Khoikhoi. However, the formalisation of that invasion in 1884-1885 at the Berlin Conference, were specific for Southern Africa's origins of Europe's scramble for Africa. This was justified through superior racial idealism that engendered White superiority against Blacks and people of colour throughout their colonies (Kunnie 2000:3). Following Bartholomew Diaz's circumnavigation of Africa in 1486, Vasco Da Gama in 1497 landed in Mossel Bay and St. Helena Bay and conducted trade with the Khoikhoi people, while the Dutch established themselves as a "major naval power" at the close of the 16th century (Giliomee & Mbenga 2007:40).

South Africa's colonial epistemology was based on the Cape (Coetzee 2007:1-7). European colonization of the Cape was sparked by the Dutch and then the British, whose arrivals had a significant impact on how the land was distributed around the nation (Yanou 2005:4).

The arrival of the Dutch East India Company in 1652 fuelled the contestation of land in South Africa, introducing foreign concepts of ownership amongst others, legal principles such as *res nullius* and *dominium* (Van der Merwe 1989). The VOC¹⁵⁷,

¹⁵⁷ VOC stands for the Vereenigde Oostindische Compagnie.

founded in 1602 (see Mitchell 2007:49), was the “biggest trade enterprise” in the world, with its headquarters in Amsterdam (Giliomee & Mbenga 2007:40).

Many of the precise ways in which the economic interests of the VOC were organized had far-reaching repercussions for later developments at the Cape because they were strongly established in Dutch economic and political history (Leftwich 1976:108). The Dutch adopted their system of land registration and planning in the first colonies built primarily for administrative and agricultural purposes when they arrived in the Cape in 1652 (Van Wyk 2012:27). The idea that the land that was occupied by indigenous populations was *res nullius* informed these early methods of land-use management (Badenhorst *et al.* 2006:32; Van Wyk 2012:27). The Cape society became a microcosm of settler colonialism, embodying peculiarities and forms analysed elsewhere in African regions and South African history (Leftwich 1976:1).

The Cape society represents the first instance of Europe’s colonial project in modern-day Africa in the latter half of the 17th and early 18th centuries (Leftwich 1976:1). What began as a half-way station refreshment stop for passing ships at Table Bay, soon turned into a full-time farming colony to the eastern side of Table Mountain. Van Riebeeck soon realized that the land had immense possibilities and released nine Company servants for farming a year after they had landed in the Cape¹⁵⁸ (see Giliomee & Mbenga 2007:42; Pearson 2012:99-138). The negotiation with the Khoi-San for the Cape to become a halfway station¹⁵⁹ between India in the East and Europe in the West, was the beginning of “the original sin” of land prejudice and colonial settler occupation in South Africa (Malebe 1997:15). Thus, access to land for economic

¹⁵⁸ This is inferred from the quotation in D. Moodie: *The Record*, pp. 7-8 “Instructions for the Commanders proceeding for the service of the said Company, with their ships *Dommedaris*, *Reijger*, and the *Yacht the Hoop*, to the Cabo de Bona Esperance, in order, upon arriving there, to execute as follows: “ -Whereas it has been thought fit, by Resolution of the Assembly of Seventeen, representing the said Company, that - in order to provide that the passing and repassing East India ships, to and from Batavia respectively, may, without accident, touch at the said Cape or Bay, and also upon arriving there, may find the means of procuring herbs, fresh water, and other needful refreshments – and by this means restore the health of their sick - it is necessary that a general rendezvous [*sic*] be formed near the shore of the said Cape. Table Bay was named by Joris van Spilbergen in 1601, first known as the Cape, and later known as Cape Town in 1650 by directors of the VOC, known as the Heeren XVII. Cape Town was formerly called Camissa (Fresh drinking water/Sweet water for all) by the indigenous Khoi peoples (see Mellet 2020).

¹⁵⁹ This was a small, insecure, and limited victualing post established near the tip of the African continent, in order to support the Company’s massive monopolistic operations in the East Indies and so increase and ensure profits at home, its primary and unwavering goal (Leftwich 1976:7).

pursuits was sought by the Dutch East India Company through peaceful or violent means (see Young 2017:31).

The colonial settlement in the Cape is where the interests of the city-centre, have been consistently pursued to the detriment and growing dependence of the peripheral outline. It presents a classic example of this “metropolis-satellite or center periphery” relationship (Leftwich 1976:9). Land ownership in South Africa has been highly disputed since the arrival of white settlers (Yanou 2006:177).

Jan van Riebeeck and the Company servants with him were unfamiliar with the customary legal systems of the pastoral indigenous communities living at the Cape and the rights acquired in accordance with such systems. Moreover, they did not discover any cultivated land in the Table Valley and its immediate surroundings or come into contact with indigenous communities and their livestock. Consequently, they had no reason to suspect that the land in question belonged to the indigenous communities¹⁶⁰ (Leibbrandt 1897:20; Bosman & Thom 1952:30, 32-33, 429, in McLachlan 2018:220). Because the indigenous communities were nomadic and were pastoralists, they occupied land in a manner that made it difficult for newcomers, like Europeans, to recognize that the land was occupied (Glatigny *et al.* 2008:301-302). Indigenous communities had not yet begun their yearly migration to the Cape by June 1652, only reaching the area around the Fort in October 1652 (Leibbrandt 1897:20; Bosman & Thom 1952:43, in McLachlan 2018:220). African people had lived in peaceful symbiotic relationships with their neighbours, the environment, and their ancestors before European settlers arrived (Walker 2008:36). Economics and security became the driving force of various intra-group contestations for land as a resource from the time the Dutch arrived in 1652, with the British manipulating ownership patterns by introducing at least two unique formal land policies when they took control from the Dutch (Duly 1965; Christopher 1971).

5.2.2. Indigenous Cape African peoples

The pastoral indigenous communities had already taken up residence on the land at the Cape in 1652, a fact that the settler immigrants failed to recognize (McLachlan

¹⁶⁰ See Leibbrandt (1897:20), and Bosman (1952:30, 32-33, 429, in MacLachlan 2018:220).

2018:43). The arrival of the first white settlers to the Cape in 1652, however inaugurated the three centuries of colonial dispossession (Weideman 2006:8). The Goringhaicona, also known as *Strandlopers*, were a tiny hunter-gatherer African group that primarily relied on the ocean for their food supply. They were led by Autshomao, also known as Herry, residing in Table Bay in April 1652 at that time (see De Wet *et al.* 2016:270; Theal 1897:13; Worden *et al.* 1998:21). The nomadic nature of their existence created no need for permanent buildings but rather favoured movable encampments from place to place (Worden *et al.* 1998:25; Glatigny *et al.* 2008:304-305). Seasonal shifts, migrating from dry to wet areas, highlands to lowlands, or regions with winter to summer rains were associated with the movement of animals in a predictable pattern (Beinart 2007:58). The yearly or two-year migratory cycles of indigenous communities in the South-Western Cape were completed by some of them. Others stayed in the region's exceptionally well-watered locations for a whole year without migrating (Elphick 1977:58). The South-Western Cape had more than enough water to support livestock. Therefore, these seasonal movements were more concerned with the quality of the grazing that was available throughout the year than with rainfall and open water supplies (Smith 1984:100-104).

The Khoi and the San had inhabited South Africa for over 2000 years, with the Khoi occupying the Western and Eastern frontiers of the Cape, whilst the San occupied the interior parts (Jankielsohn & Duvenhage 2018:4). The migratory movement of the African branches towards the south during the 14th century was characterized by the convergence of several cultural traits stemming from a single origin¹⁶¹ (Wauchope 1984). Liberal history, however, tends to use this migration argument to drive a wedge between the Khoisan¹⁶² and the Black people. The purpose of this is to silence the demands of contemporary black people in South Africa for land, since the Khoisan and not the Blacks are the original inhabitants of the Southern African region¹⁶³. Nevertheless, the Azanian civilization was advanced, with farming, ironworking,

¹⁶¹ This is evidenced by the use of the same technologies for agriculture, medicine, trading, and similar tribal laws and customs etc. (see Wauchope 1984).

¹⁶² Khoisan is an academic nomenclature term coined in 1928 by Leonhard S. Schultze (in 1912 changed to Schultze-Jena) for the KhoiKhoi and the San. Though widely used in academic circles, the term is disputed by some Khoi and San people both in South Africa and Namibia as a misnomer (Schultze 1928; see Mellet 2018).

¹⁶³ Recent example of this is Olivier and Olivier (2017) who view this migration as an "unofficial colonisation" or the first colonization of South Africa. For more on the commonly shared heritage of the land of the Black people (Azania) see Wauchope (1984).

irrigation, roads, mines, smithies, rock paintings, unique culture, and language (Wauchope 1984).

Therefore, the Cape was an indigenous community pasture ahead of Jan van Riebeeck and the Dutch East India Company's arrival and setting of a refreshment station (De Wet *et al.* 2016:269-270). The Khoikhoi were pastoralists subdividing into three groups, namely Korana, Namaqua, and Einiqua, settling in the Orange and Vaal Rivers' confluence, Cape areas, and the Orange river westwards (Jankielsohn & Duvenhage 2018:4). Approximately 200,000 Khoi lived south of the Orange river in 1652, despite varying figures¹⁶⁴ (Wilson 1969:68). According to Schapera (1930:39-40), there were at least 10,000 San in what is now the [Western] Cape Province. Therefore, the first victims of customary law rights loss were rural indigenous communities living in the Cape regions (McLachlan 2018:3). The South-Western Cape's indigenous communities were pastoralists since the area received winter rainfall, whereas the grains that were historically grown by these communities in Africa require summer rainfall (Smith 1984:2). Wildlife was the basis of the San people for their hunter-gatherer existence, later assimilating into the Khoikhoi as hunters, herders, slaves, or warriors due to conflict (Jankielsohn & Duvenhage 2018:4; Saunders 1989:21-22).

Since they were nomadic hunter-gatherer indigenous peoples, "organized agreements" between these indigenous communities controlled the geographical element of the territories they lived in rather than physical bounds (Gilbert 2007:691). Recognized customary laws governed relations between the various pastoral communities that had lived there for centuries, particularly regional land acquisition laws for livestock grazing (McLachlan 2018:7-8). Thus, there was no justification for European settlers' claim of *terra nullius* on grounds that indigenous nomadic communities used land for grazing rather than for farming or permanent habitation, because the indigenous communities had distinct views regarding their customary rules (see McLachlan 2018:27).

Since land was fundamentally important primarily for pasture and hunting, rights to land were gained in these communities through cattle ownership for access to water supplies (McLachlan 2018:3; see Schapera 1930:286). The value of land without

¹⁶⁴ Elphick (1977:54) challenges this estimate and contends that there probably were not more than 100,000 Khoi in the Western Cape in 1650.

livestock was extremely low for the pastoral African populations (Elphick & Malherbe 1990:17).

The Khoisan people opposed the Cape Colony's founding and geographic development, and when settlers advanced eastward, various battles and conflicts broke out (Marks 1972; see Links, Green & Fourie 2020). Furthermore, the cruel treatment of indigenous labourers by settlers led to increased Khoisan resistance (Newton-King 1999). The Khoi and San were the first to give their lives in the fight to protect their independence and freedom, becoming victims of the most ruthless genocide South Africa had ever known, resulting in them dying off as a people (see Mbeki 1996). Nadel (1951) attributes this to a fundamental flaw in the social structure that prohibited Khoi and San from uniting in prolonged self-defence in the face of a threat like the colonists came to represent. The fragile political economies of the Khoi societies were destroyed by a squabbling war between 1658 and 1660 and a second war in the 1670s and smallpox outbreaks in the 18th century. There arose increased pressure on the land, and, most importantly, the depletion and loss of Khoi herds as a result of trading by the VOC and colonists, the power and demands of the Company, and settler material interests (Leftwich 1976:25-26). The Khoisan were adamant about protecting their resources, which for them formed the foundation of tribal life and included pastures, water, and land (see De Kiewiet 1957:82). The confrontation between the Dutch settlers and the Khoisan remains the point of departure in much of the public discourse on the land question in South Africa today.

5.2.3. Jan Van Riebeeck and the Vereenigde Oostindische Compagnie (VOC)

Jan van Riebeeck and the Dutch East India Company were profit-driven capitalists and merchants who had no interest in helping the local population (Pheko 1986:25–34). They were mercantilists with economic interests as their top priority, prioritizing European accumulation above South Africa's native population, and were willing to employ any means to further those objectives (Delport & Lephakga 2016:3). Agricultural land dispossession has been a necessary condition for capitalist progress (Arrighi *et al.* 2010:411). This “*accumulation by dispossession*” is similar to Marx's “*primitive accumulation*” as it involves the privatization of land, expulsion of peasants, conversion of property rights to private rights, suppression of alternative forms of

production, colonial processes of asset appropriation, and taxation of land (Harvey 2003:144).

The Dutch East India Company's global mercantile endeavours helped the Netherlands gain riches and money in the Cape, submitting both natives and slaves to the Company's demands and interests, and affecting the political economy and social structure of the new Cape society (Leftwich 1976:9). The inferiority of slaves and the restriction of their rights necessitated the assimilation of indigenous peoples into the white society. They were subject to servitude in settler agricultural practices and had to assimilate their own culture to become assimilated Christians. This occurred even as the nation's economy began to expand under the influence of the white population, to the detriment of the black population who were then enslaved (Vorster 2000:93; Ischei 1995; see Manavhela 2009:18).

The VOC was a company whose main ambition was to make money for its owners (Guelke 1985:426). Thus, the goal of boosting the company's profit margin through extensive trade operations was the overarching reason for the establishment of the Cape settlement. Dutch colonialism codified the mercantilist and feudal system between 1652 and 1795, a period during which the *Trekboere* formed a semi-independent feudal subsystem with its own authority and labor (*sic*) relations while still being a part of the Dutch colonial system (Terreblanche 2002:34).

From 1657 through 1800, the VOC used its accumulative strategy to establish a Dutch colony in the Cape based on mercantilism as a political philosophy (Delpont & Lephakga 2016:4). The VOC effectively controlled the activities in the Cape beginning in 1652, when Jan van Riebeeck arrived to set up a refreshment stop for ships sailing to and from the East. The Dutch East Indian Company therefore served as the vehicle through which Dutch colonialism was projected (Yanou 2005:14). As a rule, European settlers amassed land through systematic dispossession and exclusion of African natives (Young 2017:32). This "settlement" served as the start of the first organized "contact" and interaction between the transhumant "hordes" of the native Khoi and San hunting parties and the proponents of Protestant Northwest Europe's thrusting mercantilism (Leftwich 1976:7). Thus, the early European settlement and the onset of colonialism both aggravated the spatial displacement of African populations by

increasing the scarcity of cattle and arable land. This required the use of slave labour and facilitated the trade in precious minerals (Van Wyk 2012:28; Pienaar 2014:54–55; see Strauss 2019:137). Apartheid rules that institutionalized ownership patterns that prevented the majority of South Africans from owning, renting, or using property served as the pinnacle of this dispossession (see Hall 2010).

Leftwich (1976:101) lamented that much of the 17th and 18th century history in South Africa about the Cape is quite lacking. This is especially true when it comes to describing or examining the connections between the new local social reality created at the Cape and the metropolitan Dutch society and culture. The Dutch brought with them the Batavian slave concept and the flagrant opulence displayed (Giliomee & Mbenga 2007:45). Other elements of cultural and “intellectual baggage” from the West like the legal Roman-Dutch code and the traditional Reformed beliefs based on Calvinist dogma, resulted in slave ownership by the *nouveau riche* (Giliomee & Mbenga 2007:42; Viljoen 2001:28–51). When it came to status, income, power, prestige, or any other metric, so-called people of colour were, in general, situated in inferior and subordinate positions, becoming second-class citizens of society (see Leftwich 1976:11). The social position of various groups and people was therefore defined by biology and intelligence, as understood by Europeans (Tanyanyiwa 2011:50). The Dutch East India Company administrator Jan van Riebeeck (1619-1677) reserved the meanest and harshest labour for slaves soon after his arrival at the Cape in 1652 (Armstrong & Worden 1988:110).

According to the Company, this idea of overlordship in essence derived from a casual assertion of ownership to land. It was unrestricted and extended into the hinterland due to dominant rule based on force, a fundamental aspect of South Africa’s social structure throughout the apartheid years (Yanou 2005:15). To build export-dependent monocultures that supported the reproductive requirements of European labour and capital, the colonial land grabs imposed multiple racially and gendered regimes of forced labour (McMichael 2012). The VOC ruled its subjugated natives with terror, creating social distinctions between rulers and subjects, whilst rewarding its high-ranking officials with wealth and status to instil fear and awe on the conquered, forcing them to accept their place in society (Guelke 1985:427).

Leftwich (1976:1) aptly sums up the general features of the colonial process and its subsequent formation of a new social reality in the Cape:

There was a clash of competing and contrasting economic systems and their associated ideologies, cultures and normative universes; there was disruption and destruction of indigenous societies and their cultures; there was the more or less forceful incorporation of indigenous peoples as labourers into the new political economy and social structure formed by the colonial encounter in the pursuance of metropolitan objectives and emergent local settler interests; there was the consequent emergence of specific local ideologies and attitudes which reflected the economic and other relations between the dominant and the dominated, and which also influenced those relationships (Leftwich 1976:1).

Consequently, the settler takeover in the Cape was the result of a combination of factors, including the Company's monopolistic and authoritarian policies, population growth and land pressure. Demand for meat increased at the Cape, together with hopes and beliefs about lucrative ranching opportunities in the east, political corruption, agitation, and the labour factor (see Leftwich 1976:36). As more and more land was taken for agricultural and residential uses, a steady process of land occupancy by Europeans developed (McLachlan 2018:28-29).

Guelke (1985:426) observes that the "freeburghers" released by the Company in 1657 with no land, capital, or labour expanded settlements by force and trickery to subjugate the local peoples:

The process of settlement expansion continued throughout the eighteenth century. At the close of the eighteenth century, about 20,000 European settlers and their 25,000 slaves had occupied and controlled close to 250,000 square kilometres of South Africa. The original Khoikhoi and San inhabitants were decimated in the colonization process and survived mainly as dependent labourers on white farms at the close of the eighteenth century, there were approximately 20,000 Khoikhoi and San within the Cape Colony. All the lands under European control, apart from the wheat and wine areas of the southwestern Cape, were given over to extensive pastoral usage. The population densities of the pastoral regions were everywhere extraordinarily low and averaged less than 2 persons per 10 square kilometres

(Guelke 1985:426).

The VOC and the settlers' pecuniary interests and imperatives mercilessly ate away at Khoisan autonomy and the relationships between different Khoisan tribes. These associations were based on their access to land and flocks, or their hunting areas and prey (Leftwich 1976:25). Thus, after 150 years, the VOC had dominion over a territory the size of Italy (Green 2022). Indigenous communities were told by Van Riebeeck that there was enough grazing available for them to use elsewhere and that he could not see any reason why they should not inhabit the property (Thom 1954:89). The Company also provided land to white Dutch settlers to graze their cattle on, build their homes on, and establish very large farms on condition that they paid token rents to the Company and tithes of a tenth of their produce. Some chose this option, while others chose not to purchase land from the Company and instead went off on their own to roam the countryside (Yanou 2005:15). The VOC decided to permit Europeans to establish farms close to the fort in 1657 due to the Khoesan (*sic*) population's inability to supply enough food. This resulted in the first few company servants being released from their contracts and granted lands along the Liesbeek River, behind Table Mountain, which led to the geographical expansion of the European settler community into the interior, moving north and then east along the coast (Green 2022:4).

5.2.4 DUTCH RELIGIOUS INFLUENCES ON THE SOUTH AFRICAN SOCIO-ECONOMIC AND POLITICAL LANDSCAPE

5.2.4.1. Colonial era

The advent of the VOC at the Cape in 1652 brought with it the official Dutch religion that became the state religion in 1651, following the Synod of the Dordrecht of 1619. This established the concept of predestination following the Calvinist reforms of Europe, resulting in the formation of the first Dutch Reformed Church in the Cape in 1652 (See Manavhela 2009:1). According to the 1996 census, the Dutch Reformed Church, which the Dutch East Indian Company brought to the Cape of Good Hope in 1652, was the largest Christian denomination in South Africa (Nelson 2003:63). The foundation of white South African history in the nineteenth and twentieth centuries was laid by the history of the Dutch settlers, afterwards known as Afrikaners, who were committed Calvinists (Nelson 2003:64). The personal-piety interpretation of covenant theology contributed to the association between Christians and settlers on the South

African frontier, an association that has significant implications for the construction of white supremacy in South Africa (Gerstner 1997:20). The Dutch Reformed Church from the Netherlands was incorporated in the capacity of a Dutch Church and upheld the colonial administration of the VOC. Through this, the VOC managed to assert its dominance over the progressions in the colony as a Christian establishment founded on Reformed principles (Gerstner 1997:29). The Dutch Reformed Church collaborated with the colonial regime during the era when it came to the subjugation of the indigenous Cape populations and the introduction of Malay, East African, and Indian individuals as slaves (Vorster 2000:94; Hofmeyr 1994:11). The Dutch's traditional way of life was significantly shaped by the Bible and religion, resulting in a limited spiritual perspective, a conservative approach to interpersonal relationships, and a deeply ingrained adherence to Dutch culture (Manavhela 2009:19). The lives of indigenous peoples who had been dispossessed of land and resources were therefore largely controlled by white settlers, with colourism playing a prominent role in the growth of the border colony (later the Boer Republic) (Manavhela 2009:20). This was founded on the theological and moral justifications of the distinctions between the baptized (European) and the unbaptized (Non-European) (Elphick & Gilomee 1982:337).

5.2.4.2. The Great Trek

The Great Trek pertains to the emigration of the Boers (mostly Dutch Reformed members) dwelling in the Eastern Cape frontier away from the Cape colony, with most of their slaves. The Trek was prompted by their perceived deprivation of their divine privileged status over non-believers due to what they perceived as British oppression by 1830. This was further heightened in 1833 when the British abolished slavery, thereby placing natives on an equal level with respectable Christians (Manavhela 2009:25). One of the most distressing concerns that plagued white Afrikaners was the termination of slavery in 1833.¹⁶⁵ This entailed parity between Blacks and Whites, and resulted in the assimilation of the native populace, a matter that was perceived as a cause for embarrassment, and which Afrikaners opposed (Storm 1989:16; also in Strauss 1994:21). The journey was undertaken by some 10,000 white Afrikaners and their 5,000 servants between 1835 and 1840 (Strauss 1994:93). The disenchanting and impoverished Dutch expressed their grievances regarding their powerlessness against

¹⁶⁵ Economic and governance reasons motivated the Trek (Terreblanche 2002:220) including language and ethnic-cultural barriers (De Gruchy 1979:19).

malevolence after the British dominance (Loubster 1987:100). This imperilled the Afrikaners' sense of self and autonomy, consequently, they opted for to reside within a republic where their principles would be more precisely delineated, and their racial strategy more distinctively portrayed (Manavhela 2009:25). The emergence of Afrikanerdom and the Volk ideology occurred during this period marked by heightened racial discrimination, which exacerbated division and tension between white and black communities. Its result was the entrenchment of European influences already present in the Cape, further shaping the interior of South Africa (Manavhela 2009:25). Afrikaners perceived the Bible, specifically the Old Testament and its recurring theme of the "Exodus" (As a representation of their resistance to British oppression (Strauss 1994:95; Vorster 2000:98) The result was the Voortrekker's realization of their Afrikaner national identity, prompting the establishment of independent Boer republics in the heartland beyond the Orange River, the South African Republic, and Orange Free State (Manavhela 2009:26).

A key influence on the creation and evolution of the Afrikaner nationalism was the legacy of the Calvinist theological doctrine (Van Jaarsveld 1961:9). Boers adopted sixteenth-century Calvinist doctrine, primarily the ideas of election and predestination as they made their slow trek through the 18th century and beyond (Patterson 1957:177). The Great Trek expanded settlers' terrain, causing further conflicts and dispossession among black communities (see Changuion & Steenkamp 2012; Van der Merwe 1989; Sparks 1991). The Boer loan farmer terrorized the native Khoikhoi and slaves into submission through words and actions to emphasize his superiority as a white Christian. He insisted on being addressed as "baas" or "master", constantly reminding the dependents that they were inferior, non-white heathen with no rights beyond those granted to them by their employer and overlords (Guelke 1985:438). He agreed that the governed needed to be intimidated and terrorized into obedience, and that power justifies itself (Guelke 1985:437).

Muller (1969:424) has claimed that the rise of Christian civilisation in South Africa was inspired by the Afrikaners' Calvinistic faith in God. The most devoted Calvinists possessed all the Israelite confidence in Jehovah, and many of them thought that the Israelis had come before them (Spilhaus 1966:92-93). The Canons of Dort, with their focus on predestination and early Calvinism's Heidelberg Catechism, were particularly suited to the tastes of the white population, which was raised treating non-white people

as slaves, serfs, or adversaries¹⁶⁶ (Thompson 1969:187). This notion of predestination was carried by the Trekkers (Jordaan 1974:491). Walker (1936:325) suggests that the 17th century Calvinism inspired the Trekkers to perceive a divinely instituted chasm between themselves, the slaves, the Khoi and the San serfs, and the Bantu pagans on the other hand. It is possible that the Calvinist dual vision of man, which has origins in its Dutch bourgeois background, had more innate impulses toward strict racial designations (Legassick 1972:9).

Katzen (1969:184) contends that the Western Cape's slave-owning past contributed to sentiments of white superiority among stock farmers. White farmers, like the Vereenigde Oostindische Compagnie (VOC), had *de facto* life and death control over their subjects, to punish those who dared to question authority. Punishments included whipping Khoikhoi servants and slaves frequently enough to likely cause their deaths, shooting them in the legs with rifles when they were being disrespectful, and even carrying out executions (Guelke 1985:438). It is also evident that the white settlers formed a unique social society that was based on race, religion, and legal position, despite some mingling with other races (Guelke 1985:453).

The perception of a select group of the best and most desirable characteristics of Europeans is another way that social Darwinism is regarded to have affected the white people of the Cape (cf. Theal 1927:504). An attitude of individual superiority that translated into a sense of communal consciousness made Afrikaners see themselves to be the chosen people because they believed they had a special relationship with God that the heathens they lived among did not (Guelke 1985:441). Thompson (1964:180-191) however follows the Hartzian interpretation of "fragment theory" in arguing that the Dutch society at the Cape was made up of a poor bourgeois section that evolved separately from its parent society.¹⁶⁷ Some see the development at the Cape as a pure product of the local situation, conspiring and harmonizing with the original Dutch attitudes to produce a distinct society on the frontier (Harris & Guelke

¹⁶⁶ In different historical and contextual circumstances, the Reformed tradition maintained a racial separatist undertone, emphasizing Europeans as the chosen descendants of Japheth (see Schlebusch 2019:422-424). Schlebusch echoes early Calvinistic views by Luther (1543:2), Zwingli (1525:263), Bullinger (1528:7, 52), Witsius (1692:387-8), Edwards (1741:73-6), Groen van Prinsterer (Groen van Prinsterer 1867:1), and Kuyper (1898:195-7) amongst others.

¹⁶⁷ The fragment thesis was created by Louis Hartz in the context of American history (see Hartz 1969:3-65). According to the original Hartz thesis, European communities abroad were not microcosms of Europe, but rather parts of broader wholes.

1977:135-153; Leftwich 1976). In its solitary environment, the fragment evolved in accordance with its own internal logic and produced a new whole (Hartz 1969:3-6). Nonetheless, in the heartland of South Africa, there is agreement in the emergence of a very race-conscious, egalitarian white society (Guelke 1985:422). By presenting a narrative of the Afrikaner nation as a chosen people and boosting the spirits of the vanquished Afrikaner, the Dutch Reformed Church actively appeased the Afrikaner people and became necessary by upholding its position between the people and the state (Corrado 2013:21).

5.2.4.3. Apartheid era

The colonial genesis of the Dutch Reformed Church in South Africa can be attributed to the dissemination of planning principles from the Netherlands. These played a crucial role in shaping the DRC's involvement in implementing a system of racialized church membership and theological justifications. The DRC thus collaborated in both formal and informal capacities with the government to enforce and execute apartheid planning (Corrado 2013:2).

The implementation of apartheid planning policy was facilitated by a complex interplay between numerous agents and processes, of which the Dutch Reformed Church was only one (Corrado 2013:2). The settlers held the belief that the indigenous people of South Africa were predetermined to carry out the sacred duty of labouring to extract timber and supply water. This was owing to their culturally inferior position subordinate to the elevated social status of the Dutch settlers whom they were obligated to serve (De Gruchy 2004). The initial religious evolution in South Africa was impacted by Afrikaans as the exclusive vehicle for articulating the chronicles and beliefs of the Afrikaner community. Calvinism was seen as a celestial intention for colonizers, and a profound correlation between political and religious facets, signifying the attitudes pertaining to the pre-eminence of the Afrikaner and the status of the indigenous South African populace. It contributed to exploitation, segregation, and ultimately, the emergence of apartheid theology and apartheid planning (Corrado 2013:3). In the context of South Africa, the process of colonial planning exhibited a transnational character. Ideas originating from the Netherlands were subjected to local discussion, adaptation, and incorporation, with the Dutch Reformed Church, also known as NGK, playing a pivotal role in this planning endeavour (Corrado 2013:3-4).

The Dutch Reformed church experienced division into racial factions, establishing a model for apartheid and facilitating the development of a "legitimizing apartheid theology". This fostered cooperation in the implementation of apartheid policies in urban centres and regions, thereby enabling the government to enact apartheid planning (Corrado 2013:2). The significant role played by the DRC in the formulation of apartheid was due to the racialized disintegration of the church¹⁶⁸ that functioned as a blueprint for societal segregation during the era of apartheid. This existed alongside the subsequent evolution of apartheid theology which garnered influence beyond the realm of Christianity as an apartheid framework (Corrado 2013:6). The failure of the DRC to uphold the unity of the believers¹⁶⁹ across the colour-bar, demonstrated through the sacraments (baptism and holy communion) became the apartheid catalyst. This plunged South Africa's social history into the abyss of racial tensions and economic exploitation. If the sacraments had been duly dispensed and faithfully embodied the transformative influence of the gospel, the course of South African social history "may have been different" (De Gruchy 2002:97).

Afrikaner insecurities, racism, acquisition of land, and the economic gain of the Afrikaner members through cheap black labour were the end goal of the forced theological justification¹⁷⁰ of the racialized disintegration (see Loubster 1996). Afrikaner theologians readily lent scriptural and theological support to the Nationalist Party for its racist national ideologies (De Gruchy 2002:33). Apartheid theology was thus more about the political, economic, and cultural survival of the Afrikaner people (see Loubster 1996). It was about job-preservation for Afrikaners who were in competition with Blacks for labour (Lalloo 1998). White supremacy and racial segregation were at the centre of apartheid theology (Kuperus 1999). The establishment of "daughter" or "mission" churches, started with "*Die Sendingkerk*" (The Mission Church) for coloured

¹⁶⁸ This resulted from the South African Synod caving into white lobbying in 1857, allowing racial segregated places of worship despite the widely held belief at the time that worship should be united. The Dutch Reformed Church (NGK) was primarily composed of Whites, whereas the Dutch Reformed Mission Church catered for Coloureds, the Reformed Church in Africa Indians, and the Dutch Reformed Church in Africa ministered to the Africans (Christopher 2000:14).

¹⁶⁹ Up until 1857 Blacks and Whites worshipped together in integrated services and partook the sacraments together though Whites were given first preference.

¹⁷⁰ For more on the theological justification of apartheid see (Loubster 1996; Lalloo 1998; Kuperus 1999). Leading Apartheid theologians were like, J.W. Coetzee, Totius, E.P., Groenewald, and Abraham Kuyper, a revered Dutch Calvinist theologian whose work enjoyed wide circulation and use within the NGK in South Africa. Kuyper's conceptualisation of the theological idea of 'Pluriformity' was the hallmark of apartheid's theologising which justified racial segregation (see Corrado 2013:10-17).

congregants in 1881. This continued with the construction of churches specifically for Blacks and Indians and institutionalized the synodic compromise conceded to the 'weakness of some'¹⁷¹ exception (De Gruchy, 2004). The theological rationale for these regrettable compromises had profound ramifications beyond religious practice, encompassing the secular domain, resulting in individual, urban, and governmental endeavours to segregate that laid the foundation for the development of apartheid planning strategies (Guelke 2005). The apartheid state's Group Areas Act's spatial dimensions were modelled after the DRC's racialized separation, which proved to the state that not only was segregation feasible but also exemplified its implementation (Christopher 2000:14). Apartheid was able to continue because of the DRC's inability to articulate its moral and religious traditions. It thus became complicit¹⁷² in perpetuating the idea that apartheid was a morally righteous and Christian endeavour (TRC Report, 1998:91). The roadmap for Apartheid theology was the DRC's 1948 paper on "*Racial and National Apartheid in Scripture*"¹⁷³ (Handelinge van die Sinode 1948:279-284). At the beginning of the National Party's rule in South Africa, the official church publication stated that apartheid could legitimately be referred to as a church policy (Laloo 1998:43). The three Afrikaans churches¹⁷⁴ completely endorsed the National Party's programme (Manavhela 2009:50).

Given the absence of significant transformations in perspectives on racial discourse within the church, it can be posited that the DRC, being intrinsically intertwined with the ongoing debate, likely plays a role in the emergence of the racial "card" issue (see Schoeman 2010:151). The DRC has a divisive relationship on race, since the church,

¹⁷¹ This is reference to the objection of some Afrikaners to drink out of the same cup with Blacks they deemed "*Heathens*" during joint Holy Communion services. The 1857 Synod proposal was that "as a concession to the prejudice and weakness of a few, it is recommended that the church serve one or more tables to the European members after the non-white members have been served." (see Giliomee 2003:219; see Manavhela 2009:60;).

¹⁷² Johan Heyns, a former clergyman, and NGK moderator estimated that in 1993, 95% of cabinet members and 70% of parliament members were also NGK members, The majority of whom were senior political and administrative officials who were active members of the NGK, and regular attendees at church services whose presence encouraged others to be loyalist faithful supporting those in positions of power (Corrado 2013:20).

¹⁷³ It is noteworthy that other DRC theologians like B.B. Keet and B.J. Marias, had sought to dissuade the church from adopting wholesale apartheid ideology, but the hardline stand of apartheid theologians won the day (see Kuyper 1999, quoting Keet 1953).

¹⁷⁴ I refer here to the Nederduits Gereformeerde Kerk (NGK) which became the traditional Dutch Reformed Church, the Nederduits Hervormde Kerk (NHK), and the Gereformeerde Kerk: the Doppers. There were divisions among the Reformed churches resulting in the establishment of the Nederduits Hervormde Kerk in 1853 and the formation of the Gereformeerde Kerk van Suid-Afrika in 1859. The three remained the Afrikaner church groupings.

as a body of socialization, has contributed to the perpetuation of racism within South Africa and continues to exist as a predominantly "white" church. It is in conflict with its non-white members, thus partially contributing to racial issues in South Africa (Jansen 2009:1, 3).

5.2.5. European settler attitude(s) towards the local people(s)

The main factor in any conservative analysis of the overall trajectory of South African development is race, which was the predominant social reality in South Africa (Alexander 2002:12). While racism has historically persisted in other advanced capitalist countries such as the United States, a more institutionalized and widespread system of racial discrimination existed in South Africa during the period of capitalist growth (Stasiulis 1980:463). The growth of capitalism and the pervasive racial segregationist policies of Apartheid gave rise to the race-class divide in the South African historical outlook (Tanyanyiwa 2011:53; see also Terreblanche 1997). While early frontier settlers had less stringent racial ideas than the inhabitants of the southwestern Cape, the closing of the frontier was largely responsible for establishing these attitudes in the white population (Giliomee and Elphick 1979:383-385). Legassick (1980:56), in his study of frontier racism, concludes that frontier settlers were no more racially conscious than white Cape Town residents. Racialization as a method of control and subjugation dates to the earliest Cape's colonial settlement. The Cape served as one of the colonial geographies that would become laboratories for superfluity. This made South Africa a country where race was one of the fundamental twin two political weapons of imperialist rule, and along with bureaucracy, interlocking with South Africa's period of industrial capitalism¹⁷⁵ (Arendt 1979:207; see also Silverblatt 2004).

Bureaucratic and racial histories, born out of colonialism and the new world evolution, are closely related to those of imperialism and "the racial instrumentalities of a 'would-be master race'" (Silverblatt 2004:4-5). Yet, this new cultural framework was impacted by European ideas about politics and society, since economic realities in it took precedence over class structure (Guelke 1985:424). The white farmer's role in

¹⁷⁵ The original paper was delivered in the session on Southern African Societies (Institute of Commonwealth Studies, London) in 1970-1971.

governance revolved around dealing with non-white people, keeping them in line, and emphasizing the difference between white settlers and nonwhite subjects. He viewed nonwhite individuals in the same way as the VOC had regarded society (Guelke 1985:439).

Thus, the incorrect foundation of a ferocious power struggle served as the basis for the South African social order, in which the dominating colonists (that is, those in possession of land), have always defined social standards (Malebe 1997:13-14). With a poorly developed idea of organic social democracy, the VOC established an autocratic and exploitative political and social order at the Cape. One's value was thus determined by the amount of power they could wield, rulers had a duty to the ruled, and power existed to be used primarily to maintain the positions of the powerful (Guelke 1985:436).

Patterson (1953:56) discusses the critical query of how "cultural conflict" gave place to "colour conflict" during the [Cape] *sic* incorporation process. Historians observe a mixed bag of white settler racism and brutality, religious piety and zeal, or lack of it, and European values as factors that might have shaped life on the Cape frontier (see Guelke 1988). Calvinism is partly liable for many aspects of the attitudinal and behavioural posture of Dutchmen in the Cape, according to a popular premise in much of South African historiography (Leftwich 1976:135-136). In this regard, Mason (1970:198) notes the significance of the Calvinist faith. The predestination and companionship of the elect of God beliefs of Calvinism encouraged individualism among the white residents of the Cape and gave the colony a distinctly bourgeois *mentalité* (Guelke 1985:440). This strict theology, which had been inculcated in the initial Dutch settlers over a hundred years, was at the centre of the development of the Afrikaner volk and its strong ties to seventeenth-century Calvinism (Troup 1972:50).

Early Calvinism among the settlers thus solidified into a rigorous ideological racism creating a rigid secluded milieu, where ideas from the seventeenth century flourished in the frontier (MacCrone 1965:126-131). The Christian claim of the settler farmer gave legitimacy to his domination of the heathen surrounding him, whilst equality in law between Christian and heathen was a far-fetched idea (see Guelke 1985:439; also in MacCrone 1937:127). Any attempt to treat the Khoikhoi in an equal manner as Whites

was met with sharp resistance, since the law was made of further economic goals of the VOC (Vorster 2000:97). The exclusivist nature of the Calvinism that the farmers brought with them on the frontier from the southwest Cape further contributed to hardening racial relations and supporting the idea that Whites had a permanent monopoly¹⁷⁶ on the Christian religion, just like their contemporary Calvinists of the Dutch Reformed Church (Guelke 1985:440). Many white people were so arrogant as to prevent black people or their descendants from mating with their blood¹⁷⁷ as much as was within their ability (Sparrman 1977:264). The racial intolerance and exclusivism of the white settlers strengthened their resolve to preserve their own identity, which they defined in terms of race, religion, and culture. They even refused to assimilate the Dutch-speaking offspring of white-Khoikhoi unions, demonstrating a well-developed form of racism among most white frontier residents (MacCrone 1965:67; Guelke 1985:443).

5.2.6. White Cape settler community

Guelke (1985:434) perceives an exclusive orthodox society that upheld the European way of life in the Cape, on the one hand; and a group that encouraged cultural fusion within a loose social structure on the other hand. This resulted in two distinct white communities on the Cape boundary. The former cemented their place in the Cape social hierarchy structure by settling families in isolated farms and maintaining an exaggerated sense of law and order. They perceived themselves as a respectable God-fearing middle class with a unique class and value-system (see Guelke 1979:64; Guelke 1985:436). This group adopted the governance and value-systems of the VOC as their only model of civilisation for middle-class existence wherever they established white-dominated frontier communities (Guelke 1985:436).

¹⁷⁶ As recent as November 2019 a renowned white evangelist Angus Buchan had to apologize to the South African nation for claiming that the only people who have a covenant with God are Jews and Afrikaans (see <https://www.news24.com/news24/angus-buchan-apologises-for-saying-only-jewish-and-afrikaans-people-have-covenant-with-god-20191106>).

¹⁷⁷ The burghers Willem Plooy and Frederick Zeele refused to allow their sons to serve in the commandos in 1780 on the grounds that they were considered bastards and, as a result, were not deemed deserving of this civic obligation (South African Archives, SW 10/2: Dagregister, n.p. (16 June 1780; see Guelke 1985:441).

The family settlers' decisions were influenced by their prior exposure to VOC rule. They were unable to resist the influence of the VOC when assuming control of their remote estates' mixed population of Europeans, slaves, Khoikhoi, and San (Guelke 1985:436). Thus, the governmental methods that were employed throughout South Africa's history did not originate with the Apartheid state. Rather, they first appeared where early colonial settlement and slavery collided, and later in conflicts between imperial liberalism, industrial capitalism, and the rethinking of empire as a project comparable to settler colonialism (Mkhize 2015:7). Khoisan slavery and the importation of Indian plantation workers were viewed as inevitable parts of the modernization process, which was initially conceptualised and justified in moral and religious terms (Tanyanyiwa 2011:50).

The Khoisan were effectively destroyed and vanished¹⁷⁸ because of a combination of economic, political, social, and military forces that were set in action during the earliest examples of the “development of underdevelopment” (Leftwich 1976:2). Brute force was used to maintain law and order, shaped by economic and social factors influencing the stratification of society, with non-white slaves and the remaining Khoikhoi at the bottom (Guelke 1985:427). The same attitude was adopted by the “orthodox” white community who saw themselves as honourable God-fearing men and women, settling in the isolated farms in the Cape frontier to maintain their “class”. Realizing their precarious status in the social hierarchy, they used force to subdue non-Whites in the name of law and order. The limits that had to be managed in the development of the bourgeois sensibility were those that were on the periphery of the colonial contact zones. This was where racial and cultural diversity was crucial to the development of the European bourgeoisie self (Cooper & Stoler 1997). Because of their faith, race, and culture, the orthodox family settlers believed that their group was superior to the Khoikhoi and San (Guelke 1985:441). The orthodox settlers' unwillingness to accept the children of European-Khoikhoi unions serves as ample proof of their racial consciousness and religious intolerance (Guelke 1985:446).

The eastern boundary of South Africa best illuminates the country's larger political structure since it serves as a useful starting point for the story of how the land was lost.

¹⁷⁸ The Khoe, Tuu (also identified as !Xoon), and Ju (also recognized as !Xun) are the three remaining Khoesan communities that endure in South Africa today (see Barnabas & Miya 2019:91).

It provides a framework for understanding how “natives” saw themselves in relation to the British Empire (Ngcukaitobi 2018:11). The first “Bantu-Boer” skirmish occurred as early as 1702 on the Eastern frontier because of fresh black against white hostilities caused by settler encounters with other black tribes¹⁷⁹ (Sebidi 1986:4). Similarly, the Whites were able to overcome the black people and take their land and livestock in these conflicts thanks to their technological superiority (Malebe 1997:17). In what became known as the “Kaffir War” between the two groups, which lasted for a century from 1779 to 1879, a protracted history of land appropriation by Europeans that lasted for more than three hundred years was launched (Van den Berghe 1965:22-25f; Sebidi 1986:4; see Malebe 1997). The Nguni people and the colonists engaged in frequent and fierce confrontations from the late 18th century to the early 19th century, beginning in the Eastern Cape, and spreading as the *trekboere*¹⁸⁰ pushed further north to Natal, the Transvaal, and what is now the Orange Free State (Leftwich 1973:23).

An official report from 1732 classified most of the free black population—which made up around 10% of the free population—as being “extremely poor” and included numerous households headed by single female parents (Rijksarchief 1732). There was no middle class of free Blacks in the rural hinterland of the southwestern Cape, where society was fundamentally split into two classes based on race, with Whites as the free population and non-Whites as slaves (Guelke 1985:432).

5.2.7. British colonial domination

British control of the Cape as a halfway station to the East began with the fleet of Vice-Admiral Elphinstone arriving at Simons Bay in June 1795. The fleet was assisted by the main British fleet that arrived there on September 3, conquering the Cape at the Battle of Muizenberg and seizing it from the virtually bankrupt VOC in 1795. The British only returned the colony to the Dutch government¹⁸¹ in 1803 when peace had been concluded with the French after the Treaty of Amiens (Oliver and Oliver 2017:5). The Great Fish River was Cape Colony’s eastern frontier during British occupation

¹⁷⁹ This confrontation was with the Xhosa tribes as indicated by (Ngcukaitobi 2018).

¹⁸⁰ The Great Trek (due to land shortages and labour force scarcity) and Mfecane (resulted from the Zulu wars led by Shaka Zulu in the 1820s) were mass migrations in South Africa during the 1820s and 1830s that transformed the landscape (see Theal 1915; Giliomee & Mbengwa 2010).

¹⁸¹ The Dutch regained South Africa through the Treaty of Amiens. This period, though short-lived, perpetuated existing approaches to land use and control until the British took over governance again in 1806 (Carey Miller & Pope 2000; Davenport & Saunders 2000; see Oliver and Oliver 2017:5).

between 1795-1803, achieved through wars against the Xhosa people as Europeans moved inland for cultivation and stock raising (see Sparks 1990; McCusker *et al.* 2015).

In the 1800s, legislation¹⁸² was used to dispossess Africans during the aggressive annexation of Eastern Cape, with the demand for African labour in the growing white agricultural sector. This resulted in wage labour through a heavy tax policy introduced in 1860 (Weideman 2006:9). Many of the reforms that would be implemented under the British administration had previously been anticipated by Cape residents when the dictatorial VOC government was subdued (Guelke 1985:432). The Roman-Dutch legal system was however preserved by the British after they conquered the Cape in 1795. Segregated land use and town planning structures remained intact, reflecting low property values and the slow pace of development (Van Wyk 2012:28).

The Cape governor, Sir George Grey received his knighthood through the adoption of the constitution of New Zealand as Britain's final act of conquest., after a successful mission to "civilize the barbarian and hedonist races" of New Zealand a decade earlier. He landed in Cape Town on 4 December 1854 as a heroic act of promotion, with a civilising mission to build hospitals, schools and courts, instruments to impose the will of the Empire (Ngcukaitobi 2018:17). In terms of progress and the Europeans' civilising mission, Europe's expansion and conquering of South Africa was seen as the plan of God backed by the divine will (Alexander 2002:10). Europeans seized the land of indigenous people in the Cape because they considered nomadic indigenous people unproductive backward itinerants underserving of land (Gilbert 2007:691).

Sir George Grey became friends with Thomas Carlyle, a racial theorist of mid-nineteenth-century Victorian England who thought it was a mistake to have abolished slavery. He first played out the supremacy of the white race, acting out the emergent racial theories of social Darwinism, which gained popularity after the end of slavery, in that region of the world. He replaced the "bookish" education with industrial education that was "suited" to "local children", thus altering the original aim of the expansive network of missionary institutions signifying the colonial encounter on the eastern frontier (Ngcukaitobi 2018:11).

¹⁸² Example being the 1884 Native Location Act and the 1887 Squatter Laws.

The middle of the 18th century saw the socioeconomic and political structure of Cape society shift so that a man's skin tone appears to have become an important factor (Leftwich 1976:11). In the 18th century in the Cape, it was common practice to punish people with archaic methods such as flogging, hanging, breaking on the wheel, and bone breaking (see Moodie 1838-1841). The rise of segregation in South Africa should also be understood in the context of liberal imperialism, in which the institutions of nineteenth-century British imperialism created citizenship in South Africa. This was achieved by granting government representation in 1853 and governance responsibility in 1873, thus elaborating early innovative racial segregationist milestones of British imperialism (Mkhize 2015:7).

Frontier attitudes were characterized by a rigorous ideology of white supremacy, embodying conceptions of government and justice from the early eighteenth century (Guelke 1985:443). These attitudes served as the basis for the Boer republics established by the offspring of the early Cape frontiersmen. For instance, the establishment of Albany and Grahamstown on the colony's eastern frontier in the early 1830s contributed to settler colonialism and the ambition to build an agricultural colony in the style of pastoral English country towns (see Keegan 1996).

Independent Boer Republics¹⁸³ were created by the inland movement of Afrikaners, with Natal being annexed by the British in 1844, putting the Cape and Natal under British control in the mid-1840s (see Feinstein 2005; Pienaar 2014). White trusteeship over black-owned land manifested more distinctly, linking labour force accessibility and land control (Pienaar 2014). The Act of 1894 in Glen Grey was one of the first laws to institutionalize racial segregation, passed in large part thanks to Cecil John Rhodes' contributions to electoral politics in the colonial Cape and to his mining interests, which were crucial in establishing institutions of native administration (Mkhize 2015:7). The Glen Grey Act of 1894 was aimed to control African labour for migration and laid the

¹⁸³ Varied land access methods developed in the independent republics. The Glen Grey Act abolished communal landholding in the Cape and promoted individual tenure; Commission in Natal held trust land (mostly dry, barren, and small) for Zulu people under Annexation Act 37 of 1897 (Changuion & Steenkamp 2012; Pienaar 2014); In the Orange Free State, Blacks had land rights only in Thaba Nchu and Witzieshoek (Changuion & Steenkamp 2012). In the Transvaal, the Pretoria Convention of 1881 created the Native Location Commission to assign black reserves and manage land transfers (Carey Miller & Pope 2000). Blacks (what Blacks) could occupy white farms as "squatters" if they provided labor and stayed within the limit of five families per farm according to the Squatters Law Act (see Changuion & Steenkamp 2012).

groundwork for Apartheid policies (Weideman 2006:9). The subsequent 1904 Masters and Servants Ordinance defined black tenants as servants, depriving them of legal protection and establishing the basis for forced removal that lasted for almost a century (Weideman 2006:9).

With the start of the Napoleonic Wars, the British once more captured the Cape to defend the maritime route to their Asian empire. The English virtually established a century and a half of dominance up to 1961, when South Africa became an independent Republic after being a Union under British control for fifty years, starting in 1910 (Oliver and Oliver 2017:5). The Act of Westminster of 1909¹⁸⁴ institutionalized white political dominance, and a series of laws passed by the Cape and the Union parliaments created an exploitative African labour system as the legal foundation of the economic system of racial capitalism. These were the main guiding principles for white politicians and white businesspeople as they carved out a political system of white supremacy and racial capitalism (Terreblanche 1997). The British Colonial Authority famously broke its promise to grant Africans equal legal and civil franchises by giving in to the defeated Boers. The result was that granting of the vote to Africans in the Transvaal and the Free State was delayed until after the restoration of self-government to the former republics (Terreblanche 1997). This racially bigoted structure of white political and economic power remained intact throughout the period 1910-1994 resulting in great wealth, privileges, and power for white politicians and businesspeople (Terreblanche 1997).

5.3. THE UNION OF SOUTH AFRICA

The Union of South Africa was created in 1910. The South African Party implemented strong policies to hinder the growth of African peasantry (Bundy 1979:242-243). Racialized dispossession in South Africa started pre-1913¹⁸⁵ and persisted throughout the 20th century, as white supremacist regimes limited black property rights and displaced millions (Turner 2016:276). Indigenous South Africans were dispossessed

¹⁸⁴ This progressive use of law to disenfranchise Blacks is noticeable in the 1931 Westminster statutes in which South Africa gained more independence from Britain, and the 1936 Native Land Trust Bills in which General Hertzog solidified the country's colonial status in which Africans were disenfranchised and relegated to electing white representatives in the South African parliament. Hertzog, Minister of Native Affairs and Justice in 1912, believed only segregation would protect Whites in Africa.

¹⁸⁵ Legislative antecedents were Act(s) such as the Native Location Act 40 of 1879 in the Cape Colony and the Squatter Laws Act 11 of 1887 in the Transvaal (see Pityana 2015:161-166).

prior to the Union of South Africa, leading to discriminatory laws like the Natives Land Act of 1913 and the Native Trust and Land Act of 1936¹⁸⁶ (see Rugege 2004; Skweyiya 1989). The Land Acts were the antecedents of the apartheid policy of homelands (Carey Miller & Pope 2000:24; see Pienaar 2014:87-88).

Just three years after the Union of South Africa, Parliament banned black people from buying land outside designated “reserve” areas¹⁸⁷ (Sparks 2019:9). The Land Act 27 of 1913 was quickly enforced, just two months after being introduced. This prevented Africans from buying land outside of designated reserves. It outlawed sharecropping and squatting and unjustly dispossessing millions of South Africans. It drastically limited their access to land by excluding over 1.5 million hectares of rented white-owned land and half a million hectares owned by Africans (Klug 1996:291; see Weideman 2006:9). The Natives Land Act of 1913 furthermore incorporated several Glen Grey Act restrictions that prohibited Africans from owning more than 7% of the land and ended sharecropping and labour tenancies after South Africa’s Union in 1910 (Ntsebeza & Hall 2007:3).

The 1913 Act formed part of a policy framework with the Mines and Works Act and the Native Labour Regulation Act, designed to enable inexpensive labour for white industries (Wickens 1981). Mafeje (1988:100) notes that prior to mineral discovery in the 1860s, Africans excelled in adapting to commodity farming and were highly productive agricultural producers. The discovery of minerals (1870s-1880s), however led to a demand for cheap labour, shifting colonial focus from farmers to wage labour (Hall & Ntsebeza 2007:3; see also Coles 1993). Blacks were forced to urban areas as migrant laborers with strict rules that prohibited living near mines or with family¹⁸⁸ (Coles 1993:709).

The 1913 Natives Land Act led to black Africans losing economic independence and working for white farmers, resulting in poverty for some and economic survival for

¹⁸⁶ 7.5% of land surface was reserved for Blacks through the Native Land Act, and a cumulative 13% through the Native Trust and Land Act (see Gibson 2010; Pienaar 2014:89-92; Letsoalo 1987:40-41).

¹⁸⁷ These constituted a mere 7% of mostly non-arable land in the outskirts, later deemed “Bantustans” by the apartheid white minority government.

¹⁸⁸ This dismantled the family structure in black communities, engendering a culture of bastardisation in which black men had illegitimate children around the mining communities.

others. It forced black South Africans to leave their homes to work on farms and in mines, leading to economic exploitation, with white farmers as masters having control over both their land, lives, and resources (Modise & Mtshiselwa 2013:6). Blacks were instantly turned into a labourer class (Ngcukaitobi 2018:138). The government removed black people's land rights, and aiding mining and agriculture at the expense of the small black farming sector, which had offered some economic independence since colonial times. This left Blacks landless, and those on white farms were either working as servants or evicted (Sparks 1990:136; Sparks 2003:49). Faced with squalor and poverty, the displaced people¹⁸⁹ had no choice but to work in white farms, mines and urban areas (Mandela 2010:395). Moreover, Africans could only be servants in white areas, not owners (Claassens 1991:43-56). Black Africans' loss of land through the 1913 Native Land Act caused them severe socio-economic hardship (Archary 2012:2). The Act caused poverty for black South Africans by blocking them from obtaining land and renting from white landlords, prohibiting crop sharing, and promoting agricultural labour (Modise & Mtshiselwa 2013:5-6).

Presenting a contemporary analysis of South Africa's economic situation, Thabo Mbeki (1978) proposed a philosophical argument that the future is shaped by the present. He contended that all societies bear the imprint of their own past. The bourgeoisie class in Apartheid South Africa, predominantly British and later Boer, was deeply entrenched in archaic capital accumulation. The rise of capitalism and colonial expansion led to the introduction of the slave trade, which involved the confiscation of the African peasantry, fuelled by the twisted theology of Calvinism steeped in bourgeois supremacist ideals combined with patriarchal economics (Mbeki 1978:1-12).

Thabo Mbeki explains the social contract signed between the British and the Boers in 1910, in which the British promised to help modernize the Boers while respecting their customs. The Boers in return promised not to hinder the dominance of British capital, the two sides eventually agreeing on a political power-sharing agreement. This deliberately excluded the indigenous African population from the treaty and subjected them to the authority and influence of the signatories (Mbeki 1978). The Act of Union

¹⁸⁹ Mandela (2010:395) rightly states that "a white minority of barely 15% of the country's population owned 87% of the land, while the black majority — Africans, Coloureds and Indians — occupied less than 13%."

of 1910¹⁹⁰ consolidated these agreements and continued the exploitative practices and customs that characterized early capital accumulation, which stagnated in the Boer economy but was overtaken by the British capital. The South Africa Act of 1909 defined black people as subordinate and continued their colonized status. This pattern persisted with the acquisition of greater autonomy by the state in the evolution of South Africa into a republic in which the fate of Black South Africans as colonized people was sealed (ANC n.d.). State control over seized land was consolidated through laws like the Natives Land Act of 1913 and Natives Land and Trust Act of 1936¹⁹¹ after the transfer of the South African Republic to British administration in 1909, racializing national territory and making it difficult for black people to acquire or reside on purported white land (Turner 2016:288).

The notorious 1913 Land Act that divided the country into unequal zones: 87% of fertile land was reserved for Whites and 13% of unproductive land for the rest. The Natives Land Act of 1913 caused injustice from colonial and apartheid land dispossession. It led to poverty and land loss for black South Africans (Bradstock 2005:1979; Carter & May 2001:1987; Hendricks 2004:8; Mngxitama 2006:41; Hall 2010:18; Helliker 2011:43–44; see Modise & Mtshiselwa 2013:1). Before the Native Land Act of 1913 and land dispossession, few Black Africans experienced poverty as they effectively used land for their welfare and economic stability (Maylam 1986; 1989). Black Africans were self-reliant and economically sustainable, leading to prosperity in their lives and the South African economy, a fact noticed by white people, like the Natal Native Affairs Commission in 1853, who observed their rapid economic growth through land use¹⁹² (Bundy 1979:183). The financial well-being of Blacks was curtailed by the Native Land Act 1913 (Modise & Mtshiselwa 2013:6).

¹⁹⁰ This Act stripped black electors in the Cape Province of their franchise rights, leaving them as mere voters without parliamentary representation, while upholding the racially exclusive constitutions of the other three colonies.

¹⁹¹ The Native Trust and Land Act extended the Natives Land Act to appoint a commission to report on areas for black occupation and investigate additional land allocation resulting in the Beaumont Commission, whose 1916 report is significant for its policy guidelines on land tenure and segregation (Changuion & Steenkamp 2012:147; Pienaar 2014:85). The Act facilitated government's policy of racial segregation.; it enforced segregation, eliminated black property ownership, and introduced trust tenure to highlight the need for land reform (Kloppers & Pienaar 2014:683-684).

¹⁹² The theory that the return of land to Black Africans in post-Apartheid South Africa will result in food-security issues and economic collapse is therefore unsustainable. For more on the landownership and productive use of land by the Nguni and Basotho people, see Bundy (1979), and Maylam (1986). Black people were self-employed and economically viable in that they could feed themselves and sell the surplus locally and internationally. By the late 1800s, Zulus lost 75% of their land and Sotho-Tswanas lost even more land (Feinberg 2015:9).

5.4. BRIEF HISTORY OF APARTHEID SPATIAL AND ECONOMIC TRAJECTORY IN SOUTH AFRICA

At its essence, apartheid was an institutionalized system of racial planning that stratified individuals according to their racial background. It strove to minimize social exchange within urban areas while exploiting non-white labour for economic profit while allocating the most aesthetically pleasing natural landscapes exclusively for the benefit of the white population. This was an endeavour to disrupt the social, political, and ecological framework of South African cities (Corrado 2013:5). People of African descent living in South Africa shifted from self-sufficient chiefdoms to linked and dependent peasant communities living on marked tribal lands and working as wage labourers in largely white residential areas (Thompson, quoted in Vorster 2000:99). Intentionally subtle, the South African government sought to create a rift between the white and black communities, with coloured¹⁹³ people enjoying greater possibilities and Blacks being disproportionately impacted by migrant labour and homelands (Corrado 2013:5). Each of the three forms of apartheid concerns itself with the utilization and regulation of physical territory. These are: personal or petty apartheid¹⁹⁴, employed to diminish social exchanges among various racial factions; urban apartheid¹⁹⁵, striving to segregate residents and commercial hubs of divergent racial groups; and grand apartheid¹⁹⁶, aspiring to establish distinct nations (Christopher 2000).

Both historians and economists agree that a harmonization of historical and economic perspectives is essential to understanding South Africa's profit-driven Apartheid history (Motuku 2018:46). The former recognizes the persuasive influence of quantitative data, while the latter emphasizes the importance of understanding the continuity of past economic outcomes such as income, education, and unemployment, and their

¹⁹³ Coloured people refer to racially mixed offspring of African and European copulation. If their skin-coloured was lighter and had overt European features, they enjoyed greater privileges and opportunities.

¹⁹⁴ Creating distinct facilities or entrances for the usage of various racial or ethnic groups was one example of this low-level apartheid.

¹⁹⁵ The most exemplary demonstration of the progression of this concept is furnished by the Group Areas Act and the subsequent establishment of racial confines, which necessitated forced removals aimed at forming homogeneous communities that were strategically positioned to serve as a barrier between white and black South African neighbourhoods and coloured areas as well as industrial urban regions.

¹⁹⁶ In an endeavour to safeguard white governance over the predominant share of the South African domain, this endeavour was undertaken through legislative measures like the Bantu Acts, which repatriated Black Africans to their respective "homelands" and ultimately stripped them of their national citizenship.

implications for contemporary circumstances (Fourie 2014:2). This admission was aptly echoed by Mbeki (1978:1-12) who posited that South Africa's future would be shaped in the bosom of the current Apartheid class society. It would be characterized by the rise of capitalism and colonial expansion, with the bourgeoisie mired in primitive capital accumulation fuelled by the slave trade, and a distorted bourgeois supremacist theology of Calvinism coupled with a patriarchal economy. The heinous thieving of land is at the centre of land history in South Africa and informs the attempt at restoring it in the democratic dispensation (Sparks 2019:10). Past inequality and injustice in South Africa render the country's economic development as lopsided (Weideman 2006:2). The deliberate social, political, and legal efforts made in South Africa throughout its history to maintain white dominance and lessen economic competition from Africans have restrained the transformation and economic development of South African society (see Weideman 2006:3). In South Africa, history and land cannot be discussed independently (Pienaar 2014:53). This includes economic history, since land is the basis of all economic activity. Accordingly, the history of land dispossession in South Africa forms the basis for underpinning the economic patterns in South Africa today. South Africa has a lengthy and complicated history of land disputes and discussions (Resane 2019:1).

Given that Apartheid South Africa was driven by economic objectives, a comprehensive understanding of the country's economic history demands the intersection of both disciplines. The draconian land laws of the Nationalist Party informed its policy of territorial segregation, population resettlement, and political exclusion. These were reinforced by a history of conquest and dispossession (Murray and Williams 1994:316). Owing to these racial segregationist laws, black people became "perpetual tenants" with very limited rights (Claxton 2003).

The convergence of history and economics is necessary to fully understand South Africa's economic history, as Apartheid was motivated by economic goals. Economists are beginning to realize that understanding the past is essential to bringing about change in the present. This is because economic outcomes such as income, education and unemployment are extraordinarily persistent, as is the persuasive value of numerical data recognized by historians (Fourie 2014).

Central to South Africa's historical emergence was the social contract between the Boers and the British in 1910. Both parties agreed to a power-sharing agreement with the disenfranchisement of indigenous Africans and respect for Boer cultural traditions at the expense of British economic interests with Africans as the dominant subjects (Mbeki 1978:4). When the Constitution of the New South Africa was passed in 1996, Mbeki defined Apartheid as the situation in which race, and colour were used to enrich some (Whites) and impoverish the rest (Blacks). He acknowledged that a decade into democracy, South Africa's blemishes caused by more than three centuries of colonialism. Apartheid could not be removed because the country's dominant economic structure was still heavily influenced by the system.¹⁹⁷

The policies of Apartheid were a manifestation of racial bias, specifically stemming from the social psychology of Afrikaner and Calvinist communities. This being rooted in a fatalistic acceptance of divinely sanctioned racial and class hierarchies, which had long propagated the notion of black inferiority vis-à-vis Whites (Hutt 1964:30, 44, 81). The underlying prejudice that serves as the basis for discriminatory behaviour is of lesser significance compared to the social context that permits these prejudices to be utilized for economic benefit stemming from discrimination as a form of rent-seeking (Lewin 2000:257). Hutt's analysis of contemporary vernacular explicates discrimination as a manifestation of rent-seeking (Lewin 2000:257). The utilization of state institutions for the allocation of resources from one group to another, or to render support to a group for mitigating the effects of past disadvantages, is known as rent-seeking (Bhorat *et al.* 2017:5). The seizure of state power by the Afrikaner nationalist government in 1948 led to rent-seeking practices aimed at improving the material conditions of their own community and thereby improving their economic status, but this was detrimental to the black majority.¹⁹⁸

Marxist theorists asserted that Apartheid policies generated capital gains through the exploitation of low wages, which consequently meant that the working class of all races bore the brunt of the policy's disadvantages (Legassick 1974). The argument put forward by the liberal faction assumes that the benefits which capital derives from lower

¹⁹⁷ See South Africa Government Online, 2014. State of the Nation Address, 1994–2014, <http://www.gov.za/speeches/son/index.html>.

¹⁹⁸ For more on the interaction of prejudice and liberalism, see Hunt (1964) who laments the injustice of prejudice on non-white populations.

wages are secondary to the primary goal of protecting the interests of white workers from their black peers (Kaempfer & Lowenberg 1988; Moll 1991; quoted in Mariotti & Fourie 2014:114-115; Feinstein 2005; Natrass & Seekings 2011). Apartheid is presented in public choice analysis as an endogenous policy, the extent or intensity of which was primarily determined by economic interests and external pressures affecting various interest groups (Lowenberg 2014:8-9). The fact that Apartheid was situational and therefore flexible and pragmatic, depending on the economic and political environment, suggests that Apartheid can be viewed along a continuum of different levels or degrees of application (Lowenberg 2014:8). As everywhere, racism had an economic justification in South Africa that was based on the so-called “poor-white problem”, not an irrational, atavistic, or merely biased one (Lowenberg 2014:8; Hutt, in Lewin 2000:258). Racial discrimination was established as an institutionalized practice to safeguard and uphold the economic dominance of the white labour force¹⁹⁹ (Lewin 2000:258).

The tension between the demands of the economy, dictated by the exigencies of an evolving capitalist system, and the polity on the one hand, has largely shaped South Africa’s economic history (Horwitz 1967:299). It has been fuelled by white, supremacist Afrikaner nationalist ideology (Lowenberg 2014:2). Hence the historical compromise between the British bourgeoisie and the Boer peasantry was not a historical deviation, but rather the continued pursuit of maximum profit under conditions of capitalist liberty (Mbeki 1978:5).

The 21st century requires a deeper understanding of the 20th century economy, which still traces back to apartheid (Mariotti & Fourie 2014:118). There has long been a consensus among economists and South African scholars that apartheid’s sweeping regulations, arose as a response by the white working class to the threat of black competition in the labour market (Lowenberg 2014:4). Classical Apartheid was in fact preceded by a long history of segregationist policies introduced by a state-interventionist system characterized by racial enclaves (Lowenberg 2014:4). Apartheid’s foundations were set between 1652 and 1910 and had three pillars: influx

¹⁹⁹ Hutt (1964:30) suggested that the persistence of colour-based advantages is primarily an outcome rather than an impetus for economic discrimination and unfairness, exploiting the demographic vulnerabilities, which all races are susceptible to, resulting in limitations on the competitive opportunities available to non-white individuals, thereby perpetuating their economic inferiority.

control, group areas law, and prevention of unlawful occupation (Dyantyi 2021:26; Pienaar 2014:104).

A system of race-based, institutionalized separate development during the Apartheid era, as well as conflicts connected to land ownership and occupation during the colonial era spans 364 years of recorded history of tribal and colonial conflict in South Africa (Jankielsohn & Duvenhage 2018:4). To properly understand contemporary economic and spatial patterns, an appreciation of colonial racially biased property accumulation history, exacerbated by apartheid, is needed (Weideman 2006:1).

Land access and control was a central principle of colonialism and apartheid (Greenberg 2003:13). Its legacy of spatial injustice and socioeconomic exclusion present a wide range of legal-political and socio-economic factors that characterize modern towns and cities. Thus, colonialism and apartheid's legacy of spatial injustice and urban residential segregation represent significant dimensions in the historical development of South Africa's urban poor's settlement patterns (Strauss 2019:1). The development of bourgeois land rights in the countryside and the city (as "real estate"), which marks the history of capitalism from a global historical perspective, gave rise to the contemporary idea of land rights (Araghi & Karides, 2012:1). The destruction of the proletariat agricultural class through forced expropriation marks the salient features of this social engineering (Araghi 2009). The result has been debased living conditions of urban global economic centres through written titles to land ownership, concretely defined (and enclosed) physical spaces, "primitive" and expanded capital accumulation, and the growing privatization of the environment.

The notorious Native Land Act limited black people's movement and divided land by race before the National Party took power in 1948 (Lester 1998:59). After the 1948 election, the National Party enacted the Group Areas Act 41 of 1950²⁰⁰ (Rugege 2004:205). The Act entrenched racial segregation in urban areas, embodying apartheid's core²⁰¹ (Festenstein & Pickard-Cambridge 1987:6; McCusker *et al.* 2015:67). It established racial segregation, giving the state the power to dictate the

²⁰⁰The Act aimed to protect white interests and "Western civilisation" (Festenstein & Pickard-Cambridge 1987:6).

²⁰¹ The then Prime Minister D.F. Malan called the Act the "apartheid essence".

residential and commercial lives of South Africans based on race, contributing to apartheid's three pillars²⁰² (Festenstein & Pickard-Cambridge 1987:6).

The Group Areas Act worsened discrimination and segregation laws (Tayeb 1991:3). Economic factors also motivated the Act, stemming from white fears and ideological narratives to protect white interests, diminishing the Indian economic force, and complicating black acquisition of urban interests (see Festenstein & Pickard-Cambridge 1987:6; Changuion & Steenkamp 2012:192; Pirie 1984:209). The propaganda claim was that integrated development caused racial riots and tensions, and that the government sought to establish racial harmony²⁰³ (Changuion & Steenkamp 2012:192). The Act misconstrued ethnic differentiation as desirable for dissimilar races by creating a legal barrier between black and non-black landholding (Davenport 1987:396; Davenport 1990:433). The 1950 Group Areas Act forcefully expelled black, coloured and Indian people from designated "white areas", mediating the "second wave" of evictions²⁰⁴ (Bosman 2007:3).

The Group Areas Act²⁰⁵ caused forced removals, disqualifying people and communities in lawful occupation and giving them time (1-7 years) to relocate as part of Apartheid's long-term plan (Rousseau 1960:13). The forced removals caused many adverse outcomes such as broken communal ties, poverty, and unequal amenities, also resulting in loss of trading goodwill, distress, and disadvantage in relocating to secluded and underdeveloped areas (Pirie 1984:214). The Act's extensive and harsh implementation is significant when discussing land dispossession and reform. It is to blame for the current spatial justice issues regarding access to land and tenure security in urban and surrounding areas (Newton & Schuermans 2013:579-587; Strauss 2017:49-50). The Native Land Act and the Native Trust and Land Act sent black people to rural reserves, while the Group Areas Act moved non-Whites to urban outskirts (Dyantyi 2021:35).

²⁰² See earlier reference by Pienaar (2014) on page 28.

²⁰³ Smuts' government was already concerned about interracial settlements in the 1940s and focused on "reconstruction" (Mabin 1992:413).

²⁰⁴ For a thoroughgoing deliberation of the Act, see Hiemstra (1953), Henochsberg (1950), and Kirkwood (1950).

²⁰⁵ The Act had two enforcement mechanisms: the Prevention of Illegal Squatting Act 52 of 1951 and Natives Abolition of Passes and Coordination of Documents Act 57 of 1952, both prohibiting "squatting" and imposed pass-carrying requirements on black people (McCusker *et al.* 2015:67).

The 1966 Group Areas Act²⁰⁶ is the last of four Land Acts complementing the 1950 Act, consolidating laws on group areas, property acquisition, and land occupation (see Omar 1989; Davis and Corder 1990:157-168). About 3.5 million people were forcefully relocated due to the Acts from 1960 to 1983 (Platzky and Walker 1985:9-12; Robinson 1997). Despite challenges such as a constrained domestic consumer market and increasing external criticism that led to disengagement, the Apartheid economy benefited an exclusive minority of white people who enjoyed the country's wealth using a sizable, marginalized, and underpaid workforce (Clark 2014:93).

The interests of white farmers and mine owners sought cheap agricultural and mining labour and were driving segregationist policies in early South African history when the economy was primarily agricultural and mineral-extraction-based (Horwitz 1967; Kenney 1996: 10; Lowenberg 2014:4). White commercial farming and mining capital in South Africa exists due to the collapse of the rural economy in the former Bantustans and resulting cheap labour policies (Wolpe 1972; see Ntsebeza & Hall 2007). This is akin to the apartheid state policy in which profit maximization was the explicit and predominant objective in South Africa, a characteristic that distinguished it from other bourgeois nations. The nation at that time could be perceived as an almost flawless illustration of capitalism that had been cleansed of any extraneous component, exposing the inner impelling forces of its social system and its fundamental interrelationships (Mbeki 1978:6). The position of black people in this model was that of wealth producers, creating wealth not for their own benefit but for the white population to appropriate, while allowed to consume some of this wealth only in the proportions that will produce the most work continuously (Mbeki 1978:6). The structure of Apartheid was inhumane, uncivilized, and abhorrent, leading to the United Nations' proclamation of it as a crime against humanity (United Nation's *International convention on the suppression and punishment of the crime of apartheid*, on 18 July 1976).

²⁰⁶The Act mirrors the Group Areas Act of 1950 and categorizes three groups: white, Bantu, and coloured. The Act replaced "native" with "Bantu" when referring to "any person who in fact is or who is generally accepted as a member of an aboriginal race or tribe in Africa" (s12(1)(b)(i) of the Group Areas Act of 1966).

The South African Police Force (SAP) was employed to quell the successive land regimes and attended labour-related consequences. They were frequently aided by the military, more-so at the height of apartheid, making South Africa a “police state”²⁰⁷ (Brewer 1994). Moreover, police and military brutality were often unleashed upon black people in the pretext of “law and order”, showing colonial repression not empowerment for Africans. Colonial policing by nature served the government’s interests and structure, with centralized police under government control performing non-police duties (Van der Westhuizen 2001:38). Despite the global decolonization movement, the South African government used police to support colonial and apartheid policies (Young 2004:10). Policing was a political tool to monitor race-relations (Van der Westhuizen 2001:40). Controlling people’s movements and suppressing political dissent was the goal of policing black communities in South Africa for most of the 20th century (Steinberg 2001:7). The SAP was a political “hired gun”²⁰⁸ to shoot every overt and covert enemy of the South African Government.

To salvage the notorious image of South Africa internationally, the Apartheid government mounted an unsuccessful propaganda machinery using state-funds to present an image of a South Africa that was just and equitable to all peoples’ groups. Apartheid was sold as a system of separate development giving each ethnic group equal opportunity for self-development and self-determination. Internally, an Afrikaner nationalism ideology was engendered in all sectors of society, religiously through the Dutch Reformed Church, intellectually through the secret groups like the *Broederbond*²⁰⁹, and politically through the National Party. Its purpose was to fight at all costs the threat of losing the freedom gained from the British and the threat of a revolution stemming from the oppressed black majority. Membership in the Dutch Reformed Church, *Broederbond*, and National Party coalesced to conspire religious, legislative, literary, and journalistic avenues. Through these, the state propagandist

²⁰⁷Demonstrated by universal riot control tactics and armoured vehicles used to control township unrest.

²⁰⁸ I refer here to the various massacres orchestrated by the private appropriation of force by the apartheid police, that is, the Mayibuye massacre (Kimberly), the Langa Massacre (Cape Town), the Soweto Massacre (Soweto), the Sharpeville massacre (Vaal), and the Boipatong (Vaal), to name but a few.

²⁰⁹ Approximately 357 clergy members, 2039 teachers, 905 farmers, 159 attorneys, and 60 MPs—among them Reverend W. Nicol, the NGK’s Moderator for three synods—were estimated to be members of the *Broederbond*, an open organization from 1918 that went underground in 1924 (Bunting 1989). The suspicious operations of the *Broederbond* and the ‘unholy’ alliance between the Church and the State led one Reverend V. de Vos to leave the NGK in 1944 unhappy about the dominance of the *Broederbond* members, subsequently forming the “Reconstituted Dutch Reformed Church” (Bunting 1989).

image of peace and prosperity was sold locally and globally using various forums to influence public opinion about South Africa.²¹⁰ The *Broederbond* was an organization greatly impacted by Nazi ideology, which had connections to the church through diverse mechanisms. Through this, the church exerted its influence on the government to embrace apartheid policies, including the extensive representation of the church in all facets of Afrikaner society (Corrado 2013:17). The Afrikaner *Broederbond* (Association of Brothers) served as a covert political organization and clandestine intermediary connecting the national party with the church, consisting solely of men, fostering strong connections with the NGK, and providing a platform for these entities to engage in mutual discourse (Corrado 2013:22). Ultimately, the Apartheid machinery crumbled at the sustained offensive of the liberation struggle within and outside South Africa, and the international solidarity through economic sanctions.²¹¹ The converging local and global forces made the Apartheid state unrealistic and unsustainable.

5.5. SOCIAL STRATIFICATION IN SOUTH AFRICA

The National Party's enactment of Apartheid in 1948 was the culmination of an evolution of racial attitudes in South Africa, signified by the arrival of white colonizers in South Africa. It marked a pivotal moment in the nation's perspectives on race, which had been brewing throughout the 1930s and 1940s amidst the peak of forceful and deeply devout Afrikaner Christian Nationalism (Manavhela 2009:69). Dark-skinned peoples were relegated to lower social and economic positions using skin colour and physical characteristics as class markers in a colour caste system. Moreover, society was designed to serve the interests of white people, resulting in social stratification with [white] settlers becoming the ruling class with controlling power to shape the religio-political landscape and identity markers in their own image (Manavhela

²¹⁰ For more on the history of the apartheid propaganda between 1960-1980 and how it crumbled, including leading political, literary, intellectual, and journalistic figures behind it, see Obermeyer (2016). Rubin (1977) is also useful in highlighting the facts around separate development, personal freedom, education, work, health and housing, family, freedom of the press, sport, and future of Apartheid. This is against the fictitious lies that the Apartheid regime sold to the world.

²¹¹ It is noteworthy that other mass formations like the United Democratic Front (UDF), and the church, particularly the South African Council of Churches, also played a critical role in exerting pressure on the racist Afrikaner minority regime, with leading figures like Desmond Tutu, Frank Chikane, including the DRC's own Beyers Naude, and, Allen Boesak, who played a critical role in condemning apartheid. Seminal meetings and events like the Cottesloe Consultation (1960), The Word Alliance of Reformed Churches "*status confessionis*" of 1982, adoption of the "Belhar confession" by the Dutch Reformed Mission Church in 1986, Rustenburg Consultation (1990), also provided an added impetus in exerting pressure on the DRC to pronounce apartheid as sin, including international bodies like the World Council of Churches (see Manavhela 2009:60-64).

2009:74). Indigenous populations transitioned into marginalized ethnic groups, as ethnicity emerged as a determining factor in the social hierarchy during apartheid. White individuals benefited from their social status, while black individuals were subjected to exclusion solely based on their racial background (see Vorster 2000:92; Manavhela 2013:74).

With the advent of colonial influences, South Africa morphed into a nation where Europeans wielded authoritative control over the categorization of social strata and racial divisions (Vorster 2002:93). The 18th-century European theory played a role in the emergence of racial and class divisions. It was characterized by the racial superiority of white culture over all others and consequently fostering the enactment of legislation promoting white supremacy and marginalizing indigenous populations (see Ross 1993:81; Vorster 2002:93). The concept of white individuals possessing a superior culture and civilization in comparison to black individuals was founded upon a biologically grounded race-based superiority. Further reinforcing this was a theological framework that classified Whites as Christians and non-Whites as heathens, inherently placing Whites above all other cultures from the moment of their birth. This framework thereby established a mentality of white superiority and black inferiority within the entirety of the black community (Coertzen 2001:59; also in Loubser 1987:5).

The stratification of society along racial lines was characterized by the advent of both social class and racial prejudice resulting in the subjugation and suppression of the native population. These actions consolidated authority within the hands of the conquering white settlers, and rendered black people subordinates under the governance of the colonial regime (see Vorster 2002:92; Ross 1993:167).

The colonial advent brought a social hierarchy to the Cape, with the Dutch-Boer enjoying first-class citizenship, followed by Asians, Coloured, and with Blacks at the bottom-rung of society.²¹² When the British took over the colonial reigns, English-speaking Whites toppled the Dutch-Boer in the top-tier, and the now Boers became second in the hierarchy, followed by Asians, Coloured, again with Blacks at the lowest

²¹² This was the case between 1652-1795 (see Manavhela 2009:79).

level.²¹³ The disgruntlement of the Boer gave rise to the Great Trek, with subsequent formation of the independent Republics, and the amalgamation of the four Republics into the Union of South Africa. Whites formed the Boer-Briton power-sharing pact, with Europeans (Boer as the umbrella term) at the highest echelon of society, followed by Coloureds, and Blacks at the lowest strata of society.

The period 1910-1948 saw the consolidation of white power, and the codification of white supremacy and privilege. Whites (Boer-Briton) agreed to share political power and economic resources, keeping the black majority at bay and curtailing their economic, spatial, and human rights. The widespread acceptance of white supremacy in the political and economic realms of South Africa commenced in 1910 (Cochrane 1994:1). This facilitated the upward mobility of white people into the echelons of the class strata in society, particularly Afrikaners who were manual labourers.

The apartheid era of (1948-1993) was the height of white Afrikaner dominance, as the Afrikaner nationalists took political power and re-engineered society to advance Afrikaner interests. Apartheid changed the basis of societal stratification from race to class, with white South Africans increasingly benefiting from their class positions (Seekings 2003:2), facilitated by colonial foundations of white supremacy and the aggressive apartheid segregationist laws. Afrikaners were first-class citizens, and South Africa ceased to be a country of native Africans, becoming a white country with a black problem.²¹⁴ Black people were relegated to the margins of the polity. Politically, they had no human rights; socially, they were controlled property, as the state determined their living spaces, and policed their social movements. Economically, they were disenfranchised cheap migrant labourers who worked in and for white companies and families. Religiously and culturally, they were inferior, and objects of the civilising and Christianising mission of the white masters who equated civilisation and Christianity with western European culture.

In all these seminal moments in the evolution of race, status, class, and power differentials in South Africa, Blacks have always been at the bottom rung of society (see Terreblanche 2002). Post-apartheid South Africa saw most white people retaining the advantages conferred by their class position at the end of apartheid, whilst black people are overwhelmingly unemployed, poor, socially excluded, and the 'underclass'

²¹³ This is in the period between 1795-1910 (see Manavhela 2009:80).

²¹⁴ This is popularly regarded as the 'Native problem/question' in South African body politic.

in society²¹⁵ (Seekings 2003:2). Merely 0.1 percent of the populace is affiliated with the dominant class, which fundamentally stems from the ruling class during the era of Apartheid social stratification (Rehbein 2018:10). The membership of this "established class"²¹⁶ is predominantly white holding the positions of power in society (Padayachee 2013:281). It is made up of the largest landowners the vast majority of whom are a small group of white farmers who own most of the country's arable land (Rehbein 2018:10; Gelb 2003:19).

5.6. ECONOMIC POLICY AND TRAJECTORY IN POST-APARTHEID SOUTH AFRICA SINCE 1994

The Reconstruction and Development Plan (RDP) was the initial substantive declaration pertaining to the forthcoming economic arrangement of a democratic South Africa, generated in advance before the April 1994 elections²¹⁷ (Naudé 2014:447). The RDP was established on six guiding concepts, including nation-building, a sustainable and all-encompassing effort, a process driven by the people, a guarantee of peace and security for all, and the democratisation of South Africa (RDP 1994:810). The RDP Policy framework was comprised of five fundamental programs, namely: addressing basic needs; enhancing human capital; fostering economic growth; promoting democratization across the state and society; and executing the RDP (RDP 1994:11).

In 1994, during Nelson Mandela's presidency of South Africa, a wide-ranging disassembly of Apartheid policies that had formerly been implemented took place. This resulted in the cessation of detrimental practices of the previous administration and paving the path for a society that is more equitable and fairer (Clark 2014:97). The democratic revolution of 1994, as is customary with any revolution, was predicated on the welfare of human beings and the advancement of their circumstances. It

²¹⁵ The top three social classes exhibit a composition wherein white households constitute a range of 55 to 70 percent of the total population within each class, conversely, the bottom two working classes and the remaining "other" class are predominantly composed of African households (Seekings 2003:39).

²¹⁶ This is a phrase coined by Rehbein (2018) who includes the new black ruling elite in the highest categories of social classification in South Africa.

²¹⁷ The Congress of South African Trade Unions (COSATU) created the RDP, which the ANC-led alliance's future government embraced as its inaugural policy framework after going through six drafts. The RDP, according to the RDP 1994:4, is a comprehensive and unified socio-economic policy framework that endeavours to galvanize all members of society and the nation's assets towards the ultimate elimination of apartheid and the establishment of a democratic, non-racial, and non-sexist future.

necessitated the replacement of a social order characterized by Apartheid with a democratic alternative (see Mbeki 2006:6).

The RDP goal was to eliminate apartheid-era discriminatory laws and practices that favoured a small group of European-descent South Africans, making up less than 15% of the population. It enacted more equitable laws and practices to address historical economic disparities that resulted in most of the nation's industrial earnings going to Whites and foreign investors, leaving scant resources for the rest of the population (Clark 2014:95). A prosperous, thriving, and rising economy was essential to the RDP's vision of a totally transformed South Africa (Clark 2014:111).

The government RDP initiatives sought a major overhaul of the governmental landscape through a reconceptualization and redesign of ongoing activities in a way that seamlessly integrates growth and development. Government sought to eliminate inequalities, enlarging domestic markets, enabling access to foreign markets and new opportunities and promoting equity through economic empowerment and the expansion of the South African economy. This allowed the government to expand its tax base without having to resort to continuously increasing tax rates (Mandela Nelson, 23 November 1994; see RDP White Paper: Discussion Document).

The RDP was enthusiastically embraced by a special minister without a portfolio, Jay Naidoo, as its leader, however, its first budget faced severe structural economic problems. Subsequent immense pressure from the IMF and local businesses forced it into the line function of the Finance Ministry and it eventually lost traction as a major policy directive after the removal of Naidoo (Naudé 2014:449).

The *Growth, Employment and Redistribution Plan* (GEAR 1996) was the result of a smaller expert group, politically led by Trevor Manuel (later Finance Minister) and Thabo Mbeki (Deputy President and a trained economist). It filled the vacuum left by the absence of the RDP, which was replaced by the 1996 GEAR plan (Naudé 2014:449). Through the RDP, Mandela's government had implemented many important programs to improve the quality of life for South Africans, including access to clean water, health care and education. However, the new plan emphasized a reduction, not an increase, in government economic intervention (Clark 2014:102).

The goal of GEAR strategy was to rebuild a competitive fast-growing economy creating sufficient jobs for all workers. Its aim was to facilitate a society where everyone had access to good health, education, and other services; and an environment where homes and workplaces are secure and productive (GEAR Strategy document, p. 1). In alignment with the RDP goals, GEAR prioritized budget reform, fiscal deficit reduction, stable exchange rates, consistent monetary policy, relaxed exchange controls. It reduced tariffs, tax incentives for investment, state asset restructuring, increased infrastructure, flexible collective bargaining, improved training funding, expanded trade and investment, and stable policy implementation (see GEAR Strategy document, p. 2).

Leftist movements and activists, including the ruling party and the COSATU union federation, criticized GEAR as a capitalist neo-liberal policy dubbed the “1996 class project” that harms South Africa’s poor (Mathe 2002:42). It was seen as a neo-liberal program aligned with Adam Smith’s liberal economics, promoting a capitalist society.

Martinez and Garcia (1996) summarized the neo-liberalism agenda in terms of market rule, reduced social services spending, deregulation, privatization, and elimination of “public good” or “community”. GEAR was seen by some as a self-imposed structural adjustment programme aligned with the IMF’s policies, necessary for countries to qualify for new loans and make debt repayments. Naiman and Watkins (1999) argue that structural adjustment programs require policy changes like reduced spending, privatization, trade barrier reduction, foreign investment, and ownership. Mbeki however says GEAR was intended to match the RDP’s economic needs and prevent IMF involvement, which would lead to debt. It enforced neo-liberal restructuring (GEAR and Neo-Liberalism (Part 1), by Thabo Mbeki, 21 March, 2016).

The plan focused mainly on fiscal and monetary policies, neglecting industrial growth and job creation (Clark 2014:102). GEAR projected creation of 126K jobs in 1996, but formal sector jobs dropped 100K (*Finance Week*, 12 June 1997). The GEAR policy did not generate any new jobs (Koma 2013:149). The five notable flaws in GEAR policy were 1) the assumption that budget deficit reduction boosts private sector investment and growth; 2) a naïve approach to South Africa’s global reintegration; 3) the use of

private sector investment for creating employment, reducing poverty and inequality; 4) ignorance of the potential of government spending on basic services and infrastructure to promote growth and redistribution; and 5) the oversight that macroeconomic policies, liberalization, and private sector investment may not yield swift growth and development in South Africa, as evidenced by development theory and economic history (Streak 2004:280; see also Streak 1997:313-317).

The plan was written by a team representing the Development Bank of Southern Africa, the South African Reserve Bank, and the World Bank, alongside academics. The plan echoed then-current IMF and World Bank programs, prioritizing debt reduction, conservative monetary policies, and relaxation of exchange controls and tariffs (Clark 2014:102). It was welcomed by business but met with doubt and even anger from some in the labour movement who felt betrayed by their former allies in power (Mathe 2002:1).

The government admitted from 2003 that inequality and poverty were not solved after Apartheid with Mbeki asserting that South Africa had two economies, that is, the third world coexisting with the first-world global economy but structurally separate from it (Gelb 2010:52; Koma 2013:154). The first world economy was white and prosperous, while the second was poor black and rural with underdeveloped infrastructure, despite having access to developed infrastructure. The worst affected were women and disabled individuals (Bojabotseha 2011:2).

The modern economy in South Africa generates most of the country's wealth and is globally integrated, while the second (or marginalized) economy is undeveloped, has little contribution to GDP. It has an over-populated rural and urban interface, whilst being disconnected from both the first and global economy and is incapable of self-generated growth and development (Mbeki 2004:29). Mbeki's "Two-Nations Speech" expands on South Africa's economy divided into black and white under the two-nation thesis. In 1969, Mandela lamented that South Africa is rich yet plagued by extremes and contrasts, with Whites enjoying the highest living standards and Africans enduring poverty (Mandela 1969:44).

The '*Accelerated and Shared Growth Initiative for South Africa*' (ASGISA) was intended to build a staircase from the second economy to the first. It was adopted in 2006 to reduce poverty in South Africa by 50% by 2014 (Koma 2013:154). ASGISA aimed to address economic growth obstacles, including currency volatility, logistics limitations, lack of skilled labour and limited investment opportunities. Its goals were to achieve regulatory barriers for small businesses, and deficiencies in state organizations. Interventions were categorized into macroeconomic issues, infrastructure, sector investment, education initiatives, second economy interventions, and public administration issues (ASGISA 2006:2-4).

ASGISA emphasized specific growth projects, distinguishing itself from the RDP and GEAR (Bhorat 2007:35). The New Growth Path policy, introduced by Minister Ebrahim Patel in 2010, focused on employment creation and included areas such as rural and social development, agriculture, mining, tourism, science, and skills development (Koma 2013:155).

Following GEAR, the National Planning Commission (NPC)²¹⁸ was created in May 2010 to develop a long-term vision and strategic plan for South Africa, unify the nation around common objectives and priorities, and provide government with advice on cross-cutting issues for development (see www.nationalplanningcommission.org.za, accessed 25 May 2023). The Commission's Diagnostic Report, released in June 2011, identified reasons for slow progress in South Africa since 1994, including a failure to implement policies and a lack of broad partnerships. Nine primary challenges identified included poor quality school education for black people, inadequate and under-maintained infrastructure, and high corruption levels, societal divisions in South Africa with issues in public services, sustainability, and inclusive development (NDP 2012:15). To achieve the *National Development Plan* (NDP) objectives, three priorities were needed: job growth, quality education, and a developmental state. Six interlinked priorities united all South Africans to achieve equity and prosperity, including active citizenship, economic growth, and strong leadership (NDP 2012:26-27).

²¹⁸ The NPC had 24 commissioners and 2 appointed leaders chosen by the President for their skills to consult diverse stakeholders to address South Africa's challenges.

Changes were needed during the 2015 budget review to realize the NDP's vision, resulting in the *Medium-Term Budget Policy Statement* (MTBPS) reflecting on policy priorities. It identified key actions to implement the NDP, leading to a nine-point plan²¹⁹ to boost growth and create jobs, and emphasizing the need to shift towards investment and exports (2015 Budget Review, 7). In July 2017, stakeholders raised concerns about slow growth, recession, rising government debt, state-owned companies, policy uncertainty, and low confidence, resulting in a modified fourteen-point plan²²⁰ being developed (Government Inclusive Growth Plan 2017:2-5).

The ANC has had a political vision but has lacked economic preparation since government's economic policies have been contradictory and have changed frequently in less than twenty-one years (Naudé 2014:447). Developmental welfarism under the Mandela presidency (1994-1999) and the Mbeki era involved expanding grants for the poor and elderly, affirmative action policies to promote black people in management positions, and BEE Policies to transform white ownership of the economy (Bhorat *et al.* 2017:7) The ANC suggests that the NDP and Nine Point Plan are essential for achieving radical economic transformation²²¹ that benefits all South Africans, particularly African and female citizens living in poverty (5th National Policy Conference Report 2017:8).

President Cyril Ramaphosa ascended the presidency in 2018 against the backdrop of a difficult economic situation in South Africa. In a 2017 report, the High-Level Panel acknowledged the persistent spatial inequality, post-apartheid, perpetuating the legacy of apartheid that continues to impact society. Deep inequities in service quality and outcomes remain despite legislative reform and efforts to address apartheid's lasting socio-economic impact through black representation and compensation for structural

²¹⁹ The nine-point plan aimed at boosting growth and create jobs by resolving the energy challenge, revitalizing agriculture, adding value to mineral wealth, encouraging private investment, moderating workplace conflict, unlocking small business potential, boosting state companies, and implementing operation Phakisa aimed at the ocean economy and other sectors.

²²⁰ The fourteen-point plan focused on fiscal policy, financial sector, tax policy, procurement, SOE reforms, PSP framework, energy, SAA, telecommunications, Postbank licensing, minerals and petroleum, empowerment Charter for mining, and land regulation bill.

²²¹ Radical economic transformation means changing the economy's structure, systems, institutions, and ownership/control patterns through various components like job creation, shared growth, production and ownership restructuring, and unleashing people's potential by means of regulations, empowerment, budget, procurement, state-owned companies, development finance, and government programs (programmes (see 5th National Policy Conference Report 2017:8).

inequality (See Motlanthe 2017). Coupled with this is the shrinking domestic economy, and persistent deepening levels of poverty, inequality, and unemployment. The corruption and state capture²²² phenomenon wreaked havoc with state institutions and public governance, weakening public service and resulting in loss of billions of rands due to mismanagement, embezzlement, and wasteful expenditure. The COVID-19 pandemic exacerbated the crisis and more people lost jobs due to company layoffs as more businesses closed or tried to cushion themselves against the devastating economic effects of the pandemic. More people are unemployed in South Africa resulting in the introduction of the R350 monthly unemployed grant.²²³ President Ramaphosa plans to revive the economy through job creation, reindustrialization, economic reforms, tackling crime and corruption, and improving state capacity (see Economic Recovery Plan²²⁴ 2020).

5.7. CONCLUSION

Colonialism and Apartheid harmed African agriculture, leading to large-scale commercial farming by white farmers with state subsidies and cheap African labour in South Africa causing and worsening poverty among black South Africans (Ntsebeza & Hall 2007:4; Modise & Mtshiselwa 2013:5).

Poverty and landlessness in post-Apartheid South Africa continues to have a black face (see Stats SA 2012:71; Modise & Mtshiselwa 2013:2). This is fundamentally a result of colonial and apartheid spatial and economically skewed policies that favoured the minority white population. The post-apartheid black government²²⁵ has partly failed to redress these policies and upscale the lives of the majority black populace.

²²² For more on the phenomenology of state capture during the Zuma years, see Motuku (2018).

²²³ The R350 unemployment grant was initially meant to be a COVID-19 grant to cushion the public against hunger at the height of the pandemic but has had to be extended due to the worsening levels of poverty and unemployment.

²²⁴ The Recovery Plan is a government initiative formed after consultation with business, labour, and community partners, to restore the economy to inclusive growth after COVID-19 (see https://www.gov.za/sites/default/files/gcis_documents/Economic%20Recovery%20Plan%20Publication_highlights.pdf, accessed 8 June 2023).

²²⁵ Unlike the Afrikaner minority regime that aggressively upscaled the lives of the Afrikaner population from 1948-1994 through legal and economic instruments, the black-led government has failed to mimic the same but has instead reared a small politically-connected elite group who have become millionaires and billionaires leaving the majority population in abject poverty.

Post-apartheid poverty in South Africa is the result of past colonial and apartheid policies, such as the 1913 Land Act²²⁶ that deprived black South Africans of productive and sustainable land ownership rights for economic wellbeing (Modise & Mtshiselwa 2013:1). In South Africa's historical development of urban settlement patterns, spatial segregation is a crucial factor that has its roots in the colonial era (Maylam 1995:22). The improvement of how housing rights are understood and applied for the urban poor in South Africa depends on this vital geographical understanding (Strauss & Liebenberg 2014:428; Strauss 2017:181-243). Terreblanche (2002:6) argues that the three views of unequal power relations and unfree labour patterns, lack of access to land, and the unfree labour of Black people, are beneficial lenses for comprehending South African history.

Colonialism and Apartheid, like the Graeco-Roman *pax Romana* propaganda, used religious, military, racial and cultural propaganda to deprive black South-Africans of their right of citizenship, and consequently, to enjoy the divine-endowed resources of their land, maximising their use for self-determination. Whiteness was equated with superiority, and blackness with paganism, barbarism, and backwardness. Religion was used to authenticate the illusion of white supremacy, and to guarantee white privileges against African people. Military and police forces were used to subdue Africans to economically disenfranchise them, keeping them at the fringes of society. Subsequent generations of white minority colonial and apartheid regimes passed on attitudes, behaviours, and practices that ensured that black people remained at the bottom-rung of society, with each generation intensifying its domineering moorings. Accordingly, the worldview(s) of these early white ancestors has continued to inform and shape the values, perspectives, definitions, and interpretations of most white people in South Africa.

The colonial and Apartheid legacies of racially skewed spatial and economic patterns continue to frustrate democratic government's efforts to tackle challenges as evidenced by policymakers' struggle with grassroots realities and oscillating policies. The successive colonial and Apartheid land regimes have systematically kept black

²²⁶ The Act was prompted by the 1903 appointment of the South Native Affairs Commission by Lord Milner to investigate native affairs ("Native Problem") and make policy recommendations regarding black South Africans.

people out of the ownership dispensation, reducing them to be “*hewers of wood and drawers of water*” at the margins of the polity. Apartheid was the crescendo of this systemic racialized social order, virtually disarming any prospect of economic empowerment and land ownership for Blacks.

Most black South Africans remain socio-economically disadvantaged in areas such as income, assets, employment, and social status (Stats SA 2017). The pace of land redistribution also remains terribly slow. Recently, the governing party failed to agree with other Black-led political parties, particularly the Economic Freedom Party (EFF) parliamentary motion for the amendment of the section 25 of the constitution dealing with expropriation of land. This has relegated the “land question” to the periphery, further stalling the process.²²⁷ Increasing the prime lending rate to curb inflation at the targeted rate of 6% makes the cost of living in South Africa expensive. The phenomenon of “electricity loadshedding”²²⁸ has further plunged the South African economy into distress, whilst making it difficult to attract foreign direct investment. Racial capitalism characterized the history of electricity generation and supply in South Africa, where the mineral-energy complex, rail, industry, and minority white population were the main beneficiaries (see Gentle 2009:11-13). Poor planning, delayed project(s) implementation, poor workmanship, and corruption have plunged the country into normative darkness that threatens economic growth due to poor maintenance of existing infrastructure, and mismanagement of new power-station projects.

The recent COVID-19 pandemic, and the flooding episodes particularly in the KwaZulu Natal province,²²⁹ has exposed the appalling conditions of black people in South Africa. Most of them needed poverty relief interventions with more resorting to looting to assuage hunger. In the main, black people remain landless, poor, and disadvantaged

²²⁷ This was the latest intervention to try and radically speed up land redistribution for the formerly oppressed in general, and Africans in particular. Motuku (2018) deals with the slow pace and the high cost of the land restitution programme leading to its failure, including the corruption of the political elite in the result.

²²⁸ Loadshedding is the rationing of electricity power to balance supply and demand due to ailing power stations.

²²⁹ KwaZulu Natal (KZN) is one of the nine provinces in South Africa, a former Apartheid Homeland of the Zulu people. The famous Isandlwana battle where King Shaka defeated the British army in the inaugural Anglo-Zulu war in 1879, took place in KZN. The province is largely rural, with black people living in topographies vulnerable to natural disasters like floods. While a disaster fund was set to help the victims of the floods, it is unlikely that monies designated for relief went to the rightful beneficiaries due to rampant corruption in government.

relative to their white counterparts. The government's missteps demonstrate economic unpreparedness, wrong diagnosis, and prescriptions for complex issues. This has prompted leading ANC veteran Khulu Mbatha to believe the party was not ready to govern in 1994 (Khulu Mbatha, ENCA Interview, Johannesburg, 25 March 2017). According to Francis, Habib and Valodia (2021:91), the two ongoing problems that contribute to chronic economic underperformance in South Africa are the failure of politicians and policymakers to consider the limits of the South African state's ability to implement even simple economic reforms. Moreover, the political impasse is caused by ideological conflict within the ANC, which lacks a mechanism to resolve the stalemate (Francis, Habib & Valodia 2021:91). The call for radical economic transformation was reduced to empty sloganeering and ideological smokescreens used as a tool to mask the rent-seeking practices to support the Zuma-centred power elite's state-capture and economic looting spree (Bhorat *et al.* 2017:3).

Whilst South Africa remains the most unequal society in the world, inequality is rife amongst black people due to the temptation to emulate the lifestyle of the former white oppressors. A deliberate process of development is therefore necessary, wherein state policies are employed to directly and/or indirectly allocate advantageous rents. Resource reallocation must be implemented to rectify past injustices, utilizing state institutions to allocate resources from one group to another, or to facilitate the progress of a disadvantaged group in overcoming past obstacles (Bhorat *et al.* 2017:5).

This historical and economic background foregrounds my attempt to apply the Lukan moral vision on wealth-poverty issues in post-apartheid South Africa today, as we turn to offer concluding practical remarks in the next and final chapter.

Chapter 6

Luke's message as a counter-narrative: Application, summary, and conclusion

What I fear is that the liberators will emerge as elitists... and drive in Mercedes Benzes and use this country's resources... to live in palaces and accumulate wealth (Chris Hani interview Beeld, 29 October 1992, p 17).

I am he who made it possible to trade in the world markets in diamonds, in gold, in the same food for which my stomach yearns (Thabo Mbeki, I am an African Speech, 1996).

[A]s far as justice is concerned, the real test, in my view, is not so much who gets paid out what, or who goes to jail for how long. The real test is what we do in South Africa to change and transform our country, so that the massive injustices, institutionalized, systemic, which led to the violations, are corrected, that the people who suffered so much historically can now get on with their lives and feel full, free human beings (Albie Sachs, Truth and Reconciliation Commission 1999:57).

6.1. APPLICATION

The study noted that the Roman Empire's institutional administration was greatly influenced by monetary factors. However, productivity for peasants was primarily driven by labour and land access, while the elite relied on capital, land control, and slave labour as the main drivers of their productivity (Oakman 2012:155). Although money had limited utilization in the rural empire, it nevertheless played a pivotal role in the political economy by enabling the coercion of customers through a relentless cycle of indebted loans (see Oakman 2002). Similar to 'Mammon', which was money on deposit with banks or stored goods, the Roman aristocracy frequently sought money on loans, property, or storehouses to show their self-sufficiency (Finley 1973:116). The agrarian peasant economy of Luke was subsistent, with land as a precious source of food and security (Cortis 2015:91,94).

The aristocracy who elicited Jesus's criticism constituted the focal point of the economy, accumulating wealth for their own benefit while declining to equitably

distribute it among their destitute clientele (Szukalski 2013:35). Thus, Luke's agrarian economy contrasts with the capitalist economy of the twenty-first century as well as with the apartheid colonialism economy,²³⁰ which underwent a transformation from an agrarian to an industrial system. Nevertheless, both economies possess comparable mechanisms of control since a mere 1% of the global population possesses nearly 50% of the world's wealth today (see OXFAM 2015). The elites in all economies employ repressive methods to maximize their profits, whilst keeping the poor at arm's length, making sure that they do not ascend to their ranks. In this sense, Luke's radical message is very much relevant to the twenty-first-century context, and perhaps even more relevant today.

Luke compares faith in God with faith in Mammon and puts forth a revolutionary re-evaluation of the position and utility of riches, urging prudence in the accumulation of wealth and warning against placing one's security in material possessions. He advocates the relinquishment of personal belongings to assist the less fortunate and emulate the teachings of Jesus with greater fidelity (King 2019:298).

The Lukan radical message of 'good news to the poor', and 'wealth renunciation' generally, and the Zacchaeus micronarrative specifically is relevant in addressing the 'unfinished' socio-economic justice and reconciliation projects in post-apartheid South Africa. South Africa is bordering on a failed state, due to high levels of inequality, poverty, crime, corruption, and other related social maladies. Post-apartheid South Africa, experiences little progress in nation-building, development, freedom, and associated objectives, because of the sluggish rate of socioeconomic transformation after the country's democratization (Gumede 2020:129). The poor have not been prioritized in the democratic transition, instead, the elite, both political and economic, have been the main beneficiaries of the democratic dispensation.

The slow pace of socio-economic and spatial transformation has left a deep sense of hopelessness in the general populace. Meanwhile, the ruling elite have realized the enormous challenges the country is beset with, and the difficulty of undoing colonial and apartheid legacies. Consequently, they have resorted to corrupt ways to benefit

²³⁰ The term 'apartheid colonialism' encompasses the extensive and protracted marginalization of the predominant populace in South Africa, both socially and economically, along with centuries of discriminatory colonization (see Gumede 2018).

themselves, families, and cronies, whilst failing to provide services to the common man. This warrants the analysis below, of how the elites have benefited from democratic interventions that were meant to facilitate a just and equitable post-Apartheid society, leaving the majority of colonialism and apartheid victims' socio-economically disenfranchised.

6.2. CODESA

The transition of South Africa from a system of white minority rule known as apartheid to one of black majority rule was compelled by a range of factors and individuals. It was predominantly accomplished through the process of negotiation and concession involving three groups and leadership consisting of the National Party, the African National Congress (ANC), and the elite class of white capitalists in South Africa (Obi, in Van Wyk 2009:5). Prior to the commencement of formal constitutional negotiations, multiple bilateral agreements were reached among prominent individuals. The discussions encompassed the government and the ANC in May 1990 (Groote Schuur minutes) and August 1990 (Pretoria minutes), an agreement between the ANC and IFP in January 1992, as well as between the Government and ANC in February 1991 (Botha Accord) (Van Wyk 2009:16). A framework that had the potential to support the advancement of South Africa's societal and economic development was put in place during the initial decade or so of the nation's democratic era (Manganyi 2004).

Given the unpredictable characteristics of transitions, such as the one experienced by South Africa, the settlement arose from the decision-making of influential leaders from both factions, rather than the outcome of a democratic process (Van Wyk 2009:10-11). Black South Africans (ANC elites) did not win the fight for equality, but rather succeeded in negotiating the oppressive regime out of political power (Jahn 2022:20). The contentious nature of structural apartheid underwent a transformation through deliberations. Yet the endeavours to modify the contention after the transition proved to be ineffectual (Jahn 2022:37). A compromise was reached between the white economic establishment and the ANC's new political elites and a promise was made of social mobility, and a pledge to reduce extreme poverty by reallocating public resources and services after minority rule ended. This formed the shaky foundation of South Africa's political settlement (Levy *et.al.* 2021:2).

By the mid-1980s, South Africa faced a political and economic crisis, wherein the ANC possessed legitimacy without holding power and the National Party government held power without possessing legitimacy (Van Wyk 2009:10). The entirety of the negotiation and transition procedure was comprised of a meeting of coercive strategies that were enforced by both external and domestic influences (see Jahn 2022:11). South Africa attained a democratic consensus by moderating the emphasis on economic agreement, using a political agreement engaged through the elites (past and present). Common concerns were tackled, and institutional structures erected to accommodate broad interests, notwithstanding the presence of disputed arrangements (Van Wyk 2009:6).

As noted earlier, at the CODESA negotiations, the two fundamental tenets of the apartheid state – its ‘dichotomized spatial structures’ and ‘colonial economic structures’ – remained unbroken (p. 2). The outcomes favoured a negotiated settlement, in which the former white colonial and apartheid oppressors kept their economic and spatial booty intact, whilst a gradual process of socio-economic transformation ensued. One could posit that the concept of white privilege, and perhaps even white dominance in a broader sense predominantly remained unaffected by the CODESA negotiations (Meintjies 2013). To circumvent jeopardizing the grandeur of majority rule, a certain degree of conciliation, concessions, and deferrals were necessitated for the elections that transpired in the month of April, in the year 1994 (Jordan 1997:1). The rationale for this gradualism approach to socio-economic transformation was that the national democratic revolution bore a resemblance to preceding revolutions, characterized by a series of events that formed part of an ongoing sequence, with significant junctures like April 27, 1994 (Jordan 1997:2). This temporary suspension of social-transformation has become a permanent feature of the post-apartheid South-African society, rendering it the most unequal country in the world. White South Africans continue to reside in a comparatively affluent economy of the first world, whereas black South Africans inhabit an impoverished economy of the third world.

Hamilton (2014) argues that not all citizens of South Africa enjoy freedom, while Gumede (2020:131) posits that it is specifically the Black African populace that remains devoid of complete freedom in South Africa. Gumede (2018) posits the notion of a holistic restructuring of South African society as a mechanism for attaining all-encompassing freedom for the entirety of the South African populace. The apartheid

structure of affluent Whites and disadvantaged individuals of other racial backgrounds is ongoing. Albeit the minuscule privileged group has become increasingly detached from the overall citizenry instead of a burgeoning middle class composed of individuals of African and mixed racial heritage (Jahn 2022:35). The capital intensity of the economy, intricate mineral energy system, and the labour market's high demand for skilled workers all play a role in South Africa's structural poverty. This disproportionately affects women and the African population (Gumede 2018). In pursuit of a steady provision of a cost-effective workforce for the industrial and mining sectors, apartheid instated an array of initiatives, encompassing labour bureaus, restrictions on migration, and heightened political suppression (Legassick 1974).

Zacchaeus' commitment to divest is a negotiation back into society. Therefore, Zacchaeus' example demonstrates that the outcome of negotiations between the oppressor and the oppressed, the ruler and subjects, and the perpetrator and the victim, must favour the victim. Thus, notwithstanding the various national and international actors, one can conclude that the negotiated settlement, though politically sound, was socio-economically impractical. This gives weight to Lephakga's earlier claim²³¹ that the ANC was outsmarted by the white political and economic elites at CODESA. In this regard, the call for an economic CODESA as made by various social players in South Africa is justifiable. A call for a 'Zacchaeus moment' adds to this call.

6.3. THE TRUTH AND RECONCILIATION COMMISSION

Re-evaluating the purported 'miracle of transition' is increasingly imperative as the stability of South Africa's post-apartheid agreement becomes more precarious (Bowsher 2019:41). The weak balance between reconciliation and justice by the TRC has negatively affected South Africa's trajectory (see Sarkin 2001). The majority of South Africans think that social and economic justice in South Africa's post-apartheid era has been unintentionally weakened by the TRC's excessive focus on forgiving the perpetrators of apartheid atrocities. This has been at the expense of justice for those whose loved ones were slain or severely disfigured (LenkaBula 2005). Transitional peace-building cases like that of Israel and Northern Ireland followed a three-pronged approach of transition, transformation, and reconciliation. However, the South Africa

²³¹ see Lephakga's view in page 31.

case sought to move from transition to transformation with little or no transformation resulting in the prevailing socio-economic socio-psychological failures prevalent today (see Knox & Quirk 2000).

From 1994 and onwards, the TRC, the ANC, and its government representatives exhibited a tendency to downplay or entirely overlook the significance of distributive, restorative, or economic justice (Gumede 2020:135). The purported 'Rainbow Nation' is proving to be a mere facade due to the evident failure of reconciliation (Gumede 2020:134). A sense of nationhood engendered by the imperative of societal development into a nation is lacking due to the absence of profound and perpendicular camaraderie (Anderson 2006). The challenge of fostering cohesion within a nation is primarily attributed to the incapacity to enhance reconciliation, thereby leading to weak inclusive development (Gumede 2020:129). Not much has changed in the way of socioeconomic justice, and many relationships between Black and White South Africans continue to be predominantly influenced by hierarchical apartheid. Such claims are substantiated by the 'lived experiences and material circumstances' of average Black South Africans (LenkaBula 2005).

Thus, the democratic and economic elite pacts with their attendant neo-liberal policies²³² have not worked to equalize land and wealth ownership amongst black and Whites in South Africa. Despite the existence of numerous attempts to foster reconciliation throughout the initial decade of democratic governance, South Africa continues to grapple with manifold socioeconomic challenges. The nation remains profoundly fragmented, making the ruling ANC to encounter impediments in achieving reconciliation and exhibits a languid pace in implementing socioeconomic transformations (Gumede 2020:132). The perpetuation of the privileged Whites was sustained through the implementation of market-oriented policies in post-apartheid South Africa. Such actions guaranteed their ongoing acquisition of benefits while exacerbating the pre-existing imbalanced allocation of resources within the nation (Anwar 2017).

²³² Neoliberalism, which operates on individuals to encourage particular behaviours rooted in market assumptions, is identified as a pernicious economism that permeates all realms and endeavours, while fully transforming individuals into market participants (see Brown 2015:31).

Owing to the effects of historical structural inequality and the post-apartheid government's inadequate efforts to mitigate these disparities, South Africa continues to experience divisions based on race, class, and gender (BTI Country Report – South Africa 2022:17). Significant political and socio-economic divisions continue, stemming from the ineffectiveness of policies that aim to foster conflict resolution and national unity (Jahn 2022:5). These policies obstruct the essential transformation and threaten the potential for the re-emergence of the conflict that has its origins in the Apartheid framework. They pose a danger not solely to the prospects of the South African populace but also to the global community, given the intimate economic interconnection and, more significantly, the dissemination of ideological standards (Jahn 2022:5).

Since the misdeeds of the apartheid regime have only been partially acknowledged with genuine remorse, the revolutionary demands from the community that was previously marginalized have persisted (Gumede 2020:146). The inability of the TRC to effectively address the structural components of the atrocities committed by the apartheid regime is the reason for this (see Qunta 2016). The TRC's hesitancy to confront racism that forms the basis of economic disparity and other violations of human rights was quietly paradoxical (Valji 2004). The TRC ignored the colonial roots of the South African background, which is built on racialized power and privilege dynamics between oppressor and victim as well as conquest and dispossession (Mamdani 2000:59). The commendable objective of the TRC in fostering peace was not completely achieved (Gumede 2020:148).

Bowsher (2019) concludes that the TRC was a neo-liberal project that legitimized the post-apartheid neoliberalism agenda by focusing its work on individual suffering at the expense of the sufferings of black communities. This was done to divert attention from the socio-economic justice demands within black people as a community. Reparation for the socio-economic and spatial damage wrought by the apartheid regime on black people was substituted by an emphasis on reconciliation and nation-building, and the focus on human rights violations of individuals from each warring group, black and white. This was used to solicit sympathetic emotions that demonstrated the need for catharsis and forgiveness. Because human rights had been violated both by liberation-struggling black people and white minority oppressors, race was eliminated from the

equation, and forgiveness and reconciliation were emphasized as pillars of the new democratic state.

This liberal individualistic culture has come to define transformation in South Africa as a form of tokenism, in which the assimilation of a few black individuals in various industries and commerce is translated as the upward mobility of the whole group. The reality, however, is that most black people and families live in abject poverty. Many survive on meagre government social grants. The black middle-class is a tiny debt-ridden constituency whose monthly salaries do not sustain beyond the first five days (see News24 2022). There are more black people in the social welfare system than in the active labour market, and South Africa remains a welfare society. The new black political elites thrive on this welfarism as it guarantees them an electoral base every five years.

The TRC endeavoured to persuade both the ‘beneficiaries and perpetrators’ of apartheid that the historical era was unfavourable, while simultaneously diminishing the extent of political malevolence to inhumanity and constraining social injustice to suffering (Meister 2011:59). This engendered a sense of collective memory and common identity of black people as trauma-ridden peoples (Hamber & Wilson 2001:1-2). As noted by Mamdani, both Blacks and Whites were regarded as victims, and the apartheid colonialism roots of black oppression were disregarded. Transitional justice overtook retributive justice, and Blacks and Whites were to forgive each other and move forward as the ‘Rainbow Nation’ with no obligation for the socio-economic injustices of apartheid.

The TRC presented challenges in comprehending apartheid as a societal construct wherein the everyday existence of non-White South Africans was subjected to an entrenched regime of subjugation (Bowsher 2019:54). The TRC thus absolved white people from any collective responsibility for the socio-economic and spatial damage of apartheid colonialism crimes. It gave them license to enjoy the wealth and spaces acquired through black oppression and disenfranchisement with no sense of guilt or remorse for black suffering. Black people on the other hand were left to rebuild their lives with little or no resources. The call to set up a ‘restitution fund’ by the apartheid economist Sampie Terreblanche, who called for a wealth ‘reparation’ tax for individuals

worth 2 million and above was repudiated (see Terreblanche 1997). The TRC instead opted to set up an unsuccessful reparation fund that local capital oligarchs and multinational corporations barely contributed to. A meagre R30,000 was proposed as reparation, and 21,000 victims who were later reduced to 17,000 were to benefit from the fund. In essence, the TRC dealt lightly with the wounds of black people by reducing apartheid crimes to 17,000 victims (Maluleka 1997). All forms of social transformation were to be done through legal and technical institutions rather than economic redistribution (Wilson 2001:16-20). Consequently, the TRC's version of reconciliation and the infamous "Rainbow nation" epitaph entrenched an understanding of freedom as protection of individual rights which included the right of individual white persons and families to keep the colonial and apartheid land and wealth.

Nevertheless, during a time when the neoliberal transition was causing a discouragement in economic transformation, the TRC provided legitimacy to the concept of the rule of law being the focal point for societal change (Bowsher 2019:50). Reconciliation was deemed justifiable as it challenged retributive justice and subtly contested socio-economic justice frameworks that would have necessitated the relinquishment of wealth by the beneficiaries of apartheid and the violation of core market principles (Bowsher 2019:50). The totalizing effect of markets which warrants a definitive 'No' for a Christian was thus entrenched in society (King 2019:300). The purpose of the TRC was to achieve harmony between black and white South Africans, disregarding any political concerns about the socio-economic disparities arising from apartheid. Instead, it emphasized the ethical propriety of reconciliation and consequently subjugating reconciliation to the demands of neo-liberal political and economic agreements (Bowsher 2019:54). Apartheid had to be reinterpreted as a violent conflict against individual human rights across the colour-bar, instead of a white minority supremacist political rule that subjugated black people who were struggling to be politically and socio-economically free (see Bowsher 2019:54). The TRC thus became an enabler of apartheid racial injustices within the bounds of the market economy by forging reconciliation as synonymous to justice (see Finn *et.al.* 2011).

The TRC ultimately presented an erroneous racial transformation focused on reconciliation that proved to be detrimental to the socio-economic objective that formed the basis for the struggle, and ultimately became 'counter-revolutionary' to it (Meister

2011:69). Consequently, South Africa has known no lasting peace, despite the leading figures of South Africa's democracy, that is, Nelson Mandela, F.W. De Klerk and Archbishop Desmond Tutu all winning the Nobel Peace Prize for their work on the democratic transition from apartheid. Genuine socio-economic transformation and reconciliation have not occurred, and the structures that were established to mitigate the potential for socioeconomic unrest during the transitional period are now insufficient in containing the inherent risk of violent outbreaks in South Africa (Muvingi 2009).

Almost three decades after the liberation of the nation, the policy framework for socio-economic development in post-Apartheid South Africa is proving to be ineffective due to its lack of emphasis on African communities. Consequently, the historical ordeal of apartheid colonialism and disregarding the enduring grievances borne by Africans because of this oppressive system is being obscured (Gumede 2020:148). The over-emphasis on reconciliation/conflict-resolution in the South African nation-building discourse has been a deterrent in focusing on the fundamental changes needed in the South African societal architecture (see Lederach 2014:8). The achievement of reconciliation and justice in South Africa remains elusive because of the nation's failure to address the historical injustice of apartheid colonialism, thereby undermining the right of the majority to both justice and freedom (Gumede 2020:149). The burden of unrealized expectations continues to exert pressure on South Africa, notwithstanding the nation's external displays of a resilient political democracy after apartheid (Hofmeyr & Potgieter 2018:2).

The inability of government to improve the social conditions of most South Africans, as well as the lack of economic growth and job prospects, have contributed to the public disillusionment with democracy (BTI Country Report — South Africa 2022:16). The pursuit of justice and liberty has been compromised by the absence of employment opportunities and the increasing disparity between the rich and poor which give the impression that the aspects of 'freedom' have deteriorated since the year 1994 (Gumede 2020:147; cf. The Institute for Justice and Reconciliation 2013). The objective of establishing an egalitarian South Africa, wherein all citizens of South Africa collaborate harmoniously to build a collective destiny that includes the equitable apportionment of resources and authority among all within the nation, has encountered setbacks (Gumede 2020:132-133). South Africa is thus obligated to recognize its

abhorrent political and economic past of impoverishment. It must establish a unified country and foster societal harmony through the implementation of policies such as fair allocation of resources, organized reparation, and mechanisms for reconciliation and reformation (Gumede 2016:44). The achievement of genuine decolonization, whereby the indigenous population of South Africa governs the state and enjoys unrestricted liberties, remains an unfulfilled aspiration (More 2011; see Gumede 2020:137). While Habib (2013) posits the existence of a 'suspended revolution', Hamilton (2014) asserts the presence of a 'revolution still pending' in South Africa.

Consequently, genuine reconciliation between white and black South Africans in which there is true repentance and commitment to justice is still necessary. This will assist in abating the anger, bitterness, and resentment of black people towards white people in South Africa today.

As noted earlier, despite the Christian overtones in the work of the TRC, genuine reconciliation between white and black South Africans failed because there was no change of heart on the side of white South Africans. Instead, black people were coerced to forgive white people in the name of the "Rainbow Nation." Boesak (2008) is correct in asserting that Zacchaeus was not called to testify at the TRC. Accordingly, Zacchaeus' resolve in Luke 19:1-10 is a needed paradigm for true reconciliation. This reconciliation is premised on justice, that is, correcting the socio-economic wrongs of the past. The economic beneficiaries of the colonial and apartheid regimes still owe their victims reparations and restitution.

6.4. THE LAND QUESTION

The term 'Land Question' commonly denotes the 'Agrarian Question,' which pertains to the oppressive system of feudalism, that held sway in Europe prior to the French Revolution, as utilized in the canonical works of contemporary revolutionary associations (Jordan 2018:7).²³³ The issue of land reform, restitution, and redistribution

²³³ The exploitative dynamics between the colonising European landowners and the direct producers in colonial Africa, the Americas, and the Caribbean underwent transformation following European colonisation, conquest, enslavement, and genocide commencing in the late 15th century. This manifested in slavery, resurgent feudal relations, evolving into 'capitalist production relations' across the three regions. In South Africa, the introduction of Asian slaves to the Cape introduced the concept of slavery, as well as the establishment of neo-dynastic relationships between Dutch colonists and

stands as an exceedingly contentious socio-political subject in present-day South African politics, becoming an influential force in shaping the political landscape of the nation (Vorster 2019).

The dispossession of the black majority in South Africa is intricately connected to the nation's economy, as the foundation of that economy resides in land (Greenberg 2003:42). The land expropriation of the black majority of South Africa rendered black farmers unable to compete with white farmers in the agricultural sector is integral to the economic fabric of South Africa. This consolidated the system of immigrant labour and necessitated the relocation of black rural populations to racially separated areas to work on white-owned farms, mines, and industrial sites (Greenberg 2003:42). In 1996, over 45,000 European farmers possessed 82.2 million hectares, or 67% of South Africa's total land area (Fraser 2007:837).

The failure of land reform, that is, *land redistribution, land tenure, and land restitution* therefore directly impair the socio-economic and spatial well-being of Black people. The South African government that emerged after the apartheid era has not succeeded in fulfilling its commitment to rectify past inequities, encompassing the disparity in the availability and management of land resources. The government has failed to enhance the conditions of the nation's most impoverished demographic, comprising the vast number of Africans, including those dwelling in the rural regions that were once designated as Bantustans (see Kepe 1999:415).

Given that land had served as the central focus of the struggle against colonialism and apartheid, it was an inescapable consequence that land would assume a prominent position during the post-apartheid era and the inception of democratic rule. The imperative of land access necessitated the repealing of colonial and apartheid discriminatory land acts. Such actions were welcomed development, even though the problem persisted that an overwhelming 80% of land was in the hands of the European population, while no land was available outside the native reserves to which Black people were subjugated (Cordeiro-Rodrigues & Chimakonam 2020:8).

Khoisan, which extended to the Boer Republics, and the imposition of traditional wage slavery on the agricultural proletariat during the period of Union and Apartheid (Jordan 2018:7).

The way in which we approach the land issue is dependent upon our past and current circumstances. This results in divergent perspectives on what constitutes a just and equitable solution when confronted with the consequences of decades of land expropriation and the subsequent restitution and compensation process (Jordan 2018:6). Since the Roman world of Zacchaeus placed much honour on landed wealth, it is highly probable that part of Zacchaeus' wealth would have been ownership of large tracts of land. No doubt, these would have included some of the ancestral land of his Jewish kinsmen, confiscated due to their failure to repay exorbitant agricultural loans and heavy taxation. Thus, the repentant act of Zacchaeus from his corrupt fraudulent ways, would have included the restitution of ill-gotten land to the original owners. This Zacchaeus paradigm of repentance contributes to the land question in South Africa.

Kariuki (2004:4) opines that land functions as a symbol of authority during periods of political change, serving as a space for resolution and negotiation between conflicting property ownership systems and agricultural disputes. Nevertheless, the objective of land reform policies is not so much to fundamentally transform the existing disparities in land distribution, but to achieve a nuanced equilibrium that addresses both political and economic demands. The CODESA negotiators therefore succeeded in striking a careful balance that guaranteed current property rights against future government expropriation, preserving the constitutional right to property without jeopardizing redistribution plans (Chaskalson 1994). The agreement shifted the obligation of land redistribution in alignment with the constitution to the governing majority, headed by the (ANC), while also addressing the four well-known land usage laws that dispossessed indigenous Africans of their land (Booyesen 2011; Johns & Davis 1991).

Nonetheless, the downside of land reforms that are the result of negotiated settlements is that any policy created by such an implied power agreement in a political transition context will only serve to maintain the current agricultural system, thus entrenching the growth of liberal democracy (Kariuki 2004:37). A conscious effort to develop effective empowerment policies is a moral requirement in post-minoritarian institutions (Jahn 2022:35). This largely defines South Africa's attempt at reconfiguring the socio-economic architecture of society.

The poor Black masses are yet to attain land justice despite decades of political and economic free democratic rule since 1994 (Kaunda and Kaunda 2019:89). Statistics indicate that 9% of the white population, continue to retain ownership of an overwhelming 79% of the land in South Africa, with some of the remaining 21% distributed among various racial groups, encompassing individuals of Indian and Coloured ethnicities, as well as select members of the majority black people (Commeey 2015).

This persistence of unresolved land issues has transmuted South Africa into a volatile environment, as evidenced by the escalating occurrence of land invasions and evictions that are pervasive throughout the entire nation (Gumede 2016:137; see also Gibson 2009).

Land reform in South Africa is therefore not just a legal constitutional obligation, it is also a moral question. Zacchaeus teaches us to transcend the legal, constitutional framework into the realm of morality. In divesting half his wealth and recompensing fourfold, Zacchaeus went beyond the Judaic legal framework which only required a twenty-percent penalty payment for the wrongs committed. North's (2021:390) reading of Zacchaeus' fourfold restitution within the legal framework of the mosaic law accounting for violent coercive theft in Exodus 22:1²³⁴ is relevant in this regard. The violent and forceful removal of indigenous African communities from their ancestral lands, plunging their lives into complete disarray demand moral justice. In solving the land question in South Africa, we cannot solely rely on a constitution that is a product of a negotiated settlement, with economic and property power differentials favouring propertied white owners and capitalist businesses. Lukan ethics appeal for conscientious moral and ethical considerations. The question to be asked is what the moral duty of white South Africans is, towards their fellow landless black countrymen, as a result of colonial and racist apartheid minority regimes. In this regard, just and equitable ownership of land in South Africa becomes a joint project of both the former white colonizers and the black subjects. Otherwise, the continuing 'murmurings' about

²³⁴ "If a man shall steal an ox, or a sheep, and kill it, or sell it; he shall restore five oxen for an ox, and four sheep for a sheep" (Ex. 22:1).

land ownership in South Africa will persist unabated, in the same way the crowd murmured when Jesus was hosted at Zacchaeus' house.

The revolutionary songs explored earlier demonstrate Judaic affinity and importance attached to land, particularly ancestral land. This is consistent with the African view that attaches maternal characteristics to ancestral land (see Mofokeng 1997). The interdependence of the African human-ecosystem is indicated by African ethical theory, that views land as an essential component of the entire constellation of existence, which cannot be divided into binary sectors or domains (Vellem 2016:1). Thus, colonial dispossessions, and apartheid forced removals, "seared the very depth of African emotional relations with the land" (Resane 2019:2). As a prominent site of colonial scars, land is particularly important in South African history (Anwar 2017). A renewed commitment to correct the colonial and apartheid sins is required. In this regard, Zacchaeus serves as an example of how restitution and redistribution can be conducted.

6.4.1. Land redistribution, tenure, and restitution

South African economic policy since 1996 has been geared towards local and international capital, whilst co-opting the [few politically connected] aspiring black elites (Greenberg 2003:43). The transitional economic programme's primary focus was to facilitate South Africa's integration into international financial, production and commercial systems (Satgar 2012:56). The market-led agrarian reform led by the World Bank, whilst enjoying support from landowners', has failed to address problems of historical dispossession and rural poverty since its transition to democracy. This has been due to its a-historical neo-liberal outlook, coalescing with various racial, market, and commercial factors (Lahiff 2007:1577-1578). By 2005, only 4% of the targeted 30% of agricultural land had been redistributed from the hands of 45 000 European farmers who held 67% of South Africa's land in 1996 (that is 82.2 million hectares), even though government had aimed to reach the 30% by 1999 (Fraser 2007:837). Since then, every other subsequent target that the government has set around land reform, has failed (see Motuku 2018). The failure of the land redistribution programme in the main, is because of the costly profit-driven neo-liberal policy of a 'willing buyer, willing seller' led by the World Bank (Greenberg 2003:56). The principle of the 'willing seller, willing buyer' method, which guaranteed that land would exclusively be assigned via voluntary

market transactions, functioned as the fundamental basis for managing land redistribution (Muiu 2008:156). The priority of this policy was not to rescue the [landless] African majority, but to protect the minority European landowners (Cordeiro-Rodrigues & Chimakonam 2020:11).

Conversely, the acquisition of inexpensive state-owned land and production subsidies that was meant to reduced racial inequalities has mostly benefitted affluent individuals. These include agribusiness proprietors, urban entrepreneurs, and government officials who see land reform as a new avenue for capital accumulation, inadvertently exacerbating class disparities (Mtero, Gumede & Ramantsima 2023:5). Agribusiness and the elite, instead of redistributing power and wealth to the poor, have capitalized on the post-apartheid land reform to acquire governmental subsidies (Hall & Kepe 2017).²³⁵

The primary objective of land tenure reform was to assure African individuals who were leasing properties from European proprietors, and experiencing precarious tenure conditions, regardless of whether they were labour tenants, renters, squatters, or participants in contemporary, altered versions of communal tenure that are presently observed in South Africa (De Wet 1997:357-358). Most black and coloured communities who live and work on farms across South Africa, however, are exposed to incidents of eviction, physical torture and abuse. The process of restitution has not been particularly successful, with less than ten percent of European-owned land having been transferred (Cordeiro-Rodrigues & Chimakonam 2020:20).

Whereas Section 25 of the Constitution makes it difficult to expropriate land, provision is still made for the government to expropriate land for 'public good'. While some see the constitution as a stumbling block towards expropriation, Motlanthe (2017) has instead blamed the slow progress of land reform on the government. The neo-liberal government is sceptical of expropriating land, lest it upsets hegemonic market forces in the West. It was not until the EFF brought the land question back of the fore, that the ruling party took a decision to expropriate land without compensation within a

²³⁵ For the various corrupt ways in which elites and agribusiness solicit government subsidies see Mtero *et.al.* (2023).

sound legal and economic framework (neo-liberal) (see Sihlobo & Kapuya 2018). Government agreed to a constitutional amendment to speed up that process. That, however, has turned into a political expediential ploy, as both parties could not agree on the purpose of expropriation. The EFF has however succeeded in bringing the land question back on the political table. Antagonists of the land reform and expropriation agenda have often raised the question of food security as an excuse not to tinker with land ownership patterns. This argument is demeaning, since it suggests that black people have no capacity to make productive use of land. For as long as land disparities exist, racial tensions in South Africa will be constant.

While land was a critical source of wealth for the ancient Roman-Palestinian society, Africans equally place a high premium on land, particularly ancestral familial land. Land is an honourable source of wealth creation and production, with an embedded sense of kinship and religious moorings engendering a sense of community within Africans (see Cortis 2015:92). Consequently, the restoration of African communal land is tantamount to dignity restoration (Atuahene 2016). Zacchaeus' resolve in Luke 19:1-10 contributes to understanding the restoration of the dignity of the landless masses of African Blacks in post-apartheid South Africa.

6.5. BLACK ECONOMIC EMPOWERMENT

In the nascent stages of democratic governance, a modicum of economic expansion ensued, thereby facilitating public service accessibility and financial assistance for individuals, mitigating absolute destitution and fostering the expansion of the bourgeoisie. Notwithstanding, the benefits afforded to the impoverished populace scarcely ameliorated their existence, as a small part of the of the South African population, predominantly white, resided within the middle class or above (Levy *et.al.* 2021:1). Despite the overall favourable growth of South Africa's economy since the mid-1990s, the anticipated decline in inequality stemming from the apartheid era has not materialized as expected (Visagie 2013). The downfall of the Apartheid regime did indeed signify the political and ideological revitalization of South Africa and demonstrated the country's ability to conform to international norms. Nevertheless, the task of confronting past injustices, striving to build the nation internally, promoting reconciliation, and forging a new collective identity proved to be just as challenging

despite the implementation of customized approaches (Jahn 2022:4). The disparity in socioeconomic status based on race is more pronounced in South Africa than in any other country globally, even after the transition. This places responsibility for many problems and tensions in South Africa's post-apartheid era on the institutional structures and historical influence of the apartheid regime (Treiman 2007:18).

The structural impediment of race no longer poses a hindrance to South Africa's economy. However, the lingering effects of apartheid are still apparent, as demonstrated by the nation's economy being based on social class rather than race despite the implementation of certain labour market reforms gender (BTI Country Report – South Africa 2022:18). South Africa has persistently garnered recognition as the world's most unequal nation, while concurrently being rated among the nations harbouring the most abysmal crime rates over the preceding decade (Statistics South Africa 2019).

In South Africa, wealth is equated with whiteness and poverty with blackness. This continues despite significant programmes such as BEE and affirmative action that have benefited a small number of middle-class Blacks, who are now part of the 'ruling' group, and who are gradually separating from the 'ruled' populace (Jahn 2022:28). Given the robust correlation between poverty and race, Black and Coloured individuals still constitute the prevailing demographic that experiences persistent poverty (Sulla & Zikhali 2018:65). Owing to the enduring effects of apartheid and racial discrimination, the economic landscape of South Africa is distinguished by remarkably elevated levels of unemployment and inequality, alongside prevailing poverty. Black South Africans are still disproportionately prone to poverty and joblessness in comparison to their white counterparts (BTI Country Report – South Africa 2022:4). The constitutional extension of Black people's citizenship, universal suffrage, and human rights is rendered null and theoretical if the persistent structural legacy of colonial-apartheid is not addressed (Gumede 2016:136).

A successful political transition was accomplished, nevertheless, the economic transition was less successful, even though a black minority was allowed to own businesses. The enormous gap existing between the majority-black African citizenry and the predominantly white capitalist class did not close, resulting in this population

remaining impoverished throughout (Obi, in Van Wyk 2009:5). This is because, the elites on both sides reached an economic agreement that preserved the core components of capitalism (Webster & Adler 1999:348). The elitist-driven transition from the apartheid regime to the democratic one, which decided on the nature and outcome of the transition, poses a serious challenge to South Africa today (see Terreblanche 2012; Southall 2010). The persistence of dominance and oversight over South Africa's economy by the global capitalist system has not yielded substantial alterations in the societal framework (Saul 2012b).

Because of the continuous and significant economic hegemony held by the white population, the post-apartheid era has developed into a state of compromise (if not an experiment) between the majority African population and the minority white community (Gumede 2016). Therefore, a novel political consensus, akin to a social compact or social contract, is imperative for South Africa (Habib 2013). The ANC negotiators paid little attention to economic policy questions, were incoherent on the economic posture of the democratic state, and were too naïve about market forces, making them vulnerable to manipulations by the business elites. This resulted in the abandonment of the freedom charter outlook, embracing the neo-liberal economic policies that are market-friendly and favoured capital (see Habib & Padayachee 2000; Van Wyk 2009; Mbatha 2017). The 'unholy' trinitarian alliance of white business, the National Party, and international financial institutions put pressure on the ANC to change its economic outlook making it more agreeable to liberal market, with promises of foreign investment, loans, and guaranteed economic returns (Padayachee 1997:41, 42). Consequently, the (ANC) economic policy was weakened in part because of this enormous assault (Kentridge 1993:7).

The ANC has experienced a sense of unity with the global community, leading to an expectation to conform to the established principles of international organizations following South Africa's reinstatement into the international community. The result has been the retention of colonial-apartheid wealth in the hands of a white minority, and the economic upscaling and enrichment of the few new black elites, their families, and cronies. The imbalanced degree of financial disparity concerning both racial and overall wealth allocation poses a significant obstacle for most individuals striving for economic progress, as solely those hailing from affluent backgrounds possess the

means to afford ‘...leaving the bulk of the population with limited alternatives, thus resorting to criminal activities’ (see Jahn 2022:34).

The neo-liberal policies pursued by successive ANC-led governments have resulted in new societal inequalities, despite (relative) economic growth (Jahn 2022:21). South Africa does not have to choose between the "chosen glory" and the "chosen trauma" psyche as both are a reality of black experience in South Africa (see Jahn 2022). The historical legacies of colonialism and apartheid in South Africa bear significant responsibility for the prevailing income and wealth disparities. Nevertheless, the initiatives aimed at fostering economic participation for the marginalized have been insufficient, and the equitable redistribution of accumulated wealth remains inadequate even after thirty years of democratic governance (BTI Country Report – South Africa 2022:18). The configuration of South Africa’s economy has led to consistently elevated levels of income inequality (Gumede 2015). Cronje’s (2020:3) assertion that South Africa must adopt classical liberal policies to improve the lives of its citizens is therefore misguided.

According to Cronje (2020), economic empowerment of Black people through BEE, and the restoration and redistribution of land through the land reform programme is detrimental to social well-being. This is contrary to Jahn (2022:35), who advocates for class-based instead of race-based policies as a criterion for restitution and affirmative action. Undoubtedly, race and class are inextricably intertwined in South African body politic, leaving black people at the bottom-rung as underdogs in society. Race continues to be a recurring source of conflict in South Africa’s unemployment trends in addition to wealth and poverty disparities (Gumede 2020:143). Africans, who endured the greatest hardships during the apartheid era, were disproportionately susceptible to poverty as the South African economy transitioned from a racially exclusive system during apartheid to one that became class-exclusive under the democratic regime (BTI Country Report – South Africa 2022:18).

BEE has been flawed and land reform has been slow. Nonetheless, these are necessary and welcome state interventions to upscale the livelihood of Black people in South Africa, in the same way that the apartheid regime through legislation upscaled the livelihood of Afrikaner people. What is needed is a broadening of access to undo

corruption, nepotism, cronyism, and patronage to facilitate entry by the majority black population into the mainstream economy. Otherwise, corporate transformation becomes the purview of a limited group of influential black entrepreneurs such as Cyril Ramaphosa and Tokyo Sexwale, making BEE essentially a replacement of the dominant white corporate elite with a select black elite (see Mbeki 2009).

The staggering level of poverty in South Africa places a moral burden on the rich in general, and wealthy white South Africans, in particular, who have benefited directly or indirectly from the colonial and apartheid land and economic regimes. The extensive economic hegemony of white people in South Africa, often denoted as the "white monopoly capital," is accountable for the diverse inadequacies of South Africa's political economy (Anwar 2017). Zacchaeus narrative poses a model on how the economic beneficiaries of repressive systems like apartheid can work towards the upliftment of poverty-stricken individuals, because of their direct actions, or an oppressive system that provides a thriving environment for their misdeeds.

6.6. WHITE BUSINESS

Since the inception of South Africa's economic history, the involvement of South African corporations and business concerns has undeniably exerted a profound influence on the political landscape (Valsamakis 2012:78-790). From the onset, the profit-motive of the mercantile Dutch United East India Company (VOC) was the foundation of racism in South Africa. This resulted in the conversion of the Khoisan population into a slave wage working class. Profit was thus the basis for racism and class in the early colonial period. The mining revolution further spurred a white solidarity that laid the foundation for white supremacy and privilege in the Union period. This became the foundation for spatial segregation of Africans from urban centres, exploitation of their labour, and African disenfranchisement from the mainstream economy in South Africa.

The establishment of the apartheid state would have been virtually impossible outside the substantial role played by mining in the economic expansion of South Africa that was essential in the formulation and execution of apartheid (Yudelman 1984; Crush et al. 1991; Fine & Rustomjee 1996; Handley 2008). The expropriation of African men that destabilized African communities, the destruction of the African agrarian proletariat class, and the creation of mining townships, among others were all because of the

mining boom. One hundred years of mistreatment towards workers was officially established by the white apartheid regime. The results were the deeply rooted presence of inadequate health and safety records, meagre salaries, and the utilization of the migrant labour/hostel system (Moodie & Ndatshe 1994). The synergy between mining and the state is a continuous element within the existing political economy (Yudelman 1984). The racially segregated labour force was favoured by white semi-skilled and skilled labour, while exploiting the African working force and diminishing the salaries of black miners. It was among the central principles of the segregation policies put into effect by the successive apartheid regimes (Wilson 2001:103).

The Afrikaner nationalist regime set as its first task, the race-based segregation agenda, accession of political power, and the economic empowerment of the Afrikaner (O'Malley n.d.). Until then, economic power rested with the British, whilst political power was in the hands of the Afrikaner (Sparks 1990:46). The pure nationalist party sought to break Britain's grip on the economy by introducing state interventionist measures that facilitated the economic mobility of the Afrikaner. A friendly business environment was created by the Nationalist Party to empower Afrikaans businesses through preferential procurement, state contracts, favourable loans and subsidies. Moreover, the Afrikaner swelled the public service in various administrative roles. Economic development was structured by purposeful state involvement to guarantee that it complied with apartheid criteria rather than market forces, as was evidently a key component of the National Party's plan (Lipton & Simkins 1993:6). Despite being signatories to numerous international treaties, the nationalist government never fully implemented trade liberalisation and instead remained ambivalent about it during the apartheid era (Feinstein 2005: 119; Valsamakis 2012:79).

During apartheid, the *Afrikaanse Handelsinstituut* had special access to the government and economic power due to the NP rule that entrenched 'Afrikaner favouritism'. This was demonstrated in government contracts given to Afrikaner companies, indirect support to private Afrikaner companies, and directorships that intertwined with state corporations (O'Malley n.d.). Various Afrikaner business initiatives, and forums enabled networking of Afrikaner businesses, and circulation of

job opportunities amongst the Afrikaners, with the help of the state facilitated by the notorious Afrikaner *Broederbond*.²³⁶

This saw the rise of the Afrikaner capitalist industrialist class, with substantial diversified stakes in industries such as manufacturing and commerce, and the Afrikaner job-preservation policies saw the rise of the formerly agrarian Afrikaners into the middle-class. The *Broederbond* ensured Afrikaner representation in key sectors of the economy, whilst the nationalist government guaranteed a favourable political climate. Thus, a symbiotic relationship between the apartheid regime and white business existed, which benefited them handsomely. When it came to business, the Afrikaner economic movement was referred to as the 'National Party in business', much as the *Nederduitse Gereformeerde Kerk* (NGK) was called the 'National Party at prayer' (O'Malley n.d.).

White businesses generally, and particularly Afrikaner businesses, enjoyed the racial climate created by apartheid as it served their capitalistic profiteering aims (Terreblanche 1997:2002). Both the Afrikaners and the liberal English commercial interests exhibited profound willingness in endorsing the expropriation of African peasants' land, as well as the creation of a cost-effective migrant labour framework (O'Malley n.d.). Apartheid was generally beneficial to white people, guaranteeing superior education according to skin colour, but for men in particular, colourism made it possible for them to earn more money (SALDRU 2020).

It was not until apartheid became unsustainable that white businesses shifted their allegiance and began to advocate for negotiations between the regime and the liberation movement. Motives for this shift were not because business had goodwill towards the oppressed black majority, but only because capital's profit interest was threatened. The democratisation imperative that stalled access to capital investment, and economic growth (profit maximization) prompted business to oppose apartheid

²³⁶ I refer here to various Afrikaner business forums and businesses formed under the auspice of the *Broederbond* like the *Ekonomiese Volkskongres* (EVK), the *Reddingsdaadbond* (RDB), the *Ekonomiese Instituut* of the FAK; and the *Afrikaanse Handelsinstituut*. Afrikaner businesses like SANLAM, Old Mutual, Volkskas Bank, and the Rembrandt Group grew out of the Voorbrand Tobacco company, and were major proponents of the Afrikaner business movement, and ardent supporters of apartheid (see O' Malley n.d.).

locally (Gelb & Black 2004:8). Thus, the suggestion that white businesses made a significant contribution to the dismantling of apartheid is a fallacy. Rather than contributing to the solution, business was more implicated in apartheid (Nattrass 1991; Bond 2000). Capital's distaste for socialism betrays the notion that business opposed apartheid, since socialism was a key feature of the fight against apartheid (Nattrass 1991).

The business sector played a significant role in the formulation of the discriminatory system and reaped benefits from it during the era of apartheid (SACP 1997; Terreblanche 1997). The controversial Group Areas Act of 1950 arose out of endeavours by Afrikaner business to advocate for labour and other racial practices. The Act significantly contributed to the establishment of apartheid policies targeting South Africans of Indian origin (O'Malley n.d.). At the height of the apartheid militarised repression culminating in the SOWETO uprising in 1976, white businesses, conglomerates, and multinational corporations were lucratively involved in manufacturing and supply deals with ARMSCOR. This state-owned armament company manufactured weapons for the apartheid police force (O'Malley n.d.).

Business did play a mediatorial role in getting the warring parties around the table, but the motivation was always capital's own survival and profit. As noted in the TRC report:

Business was central to the economy that sustained the South African state during the apartheid years. The Truth and Reconciliation Commission (the Commission) noted that the degree to which business maintained the status quo varied from direct involvement in shaping government policies or engaging in activities directly associated with repressive functions to simply benefiting from operating in a racially structured society in which wages were low and workers were denied basic democratic rights

(TRC Report Volume 4, Chapter 2, p. 18).

The Commission concluded in its final analysis that business generally derived significant material and financial advantages from apartheid policies (TRC Report, Volume 6, Chapter 5, p. 140). Apartheid fostered white wealth and corporate success at the expense of Black workers, establishing it as a system of racial exploitation that favoured capital (see Nattrass 1999:380-381).

Without a doubt, white capital still dominates the economy in South Africa, according to Anwar (2017), that considers all these different types of capital, such as land, the stock market, and human capital. Rembrandt²³⁷ is an example of how Afrikaner capital-based enterprises have effectively navigated an altered national political economy by sustaining interests across many sectors, combining foreign interests, and interacting with significant BEE players (Chabane, Goldstein & Roberts 2006:23).

White business did some pockets of good in the transition period by funding some initiatives that were key to democratic transition, but profit maximisation drove much of capital's interests. With their eye on international markets, and by swaying the ANC to abandon its nationalist social democratic policy perspectives in favour of neo-liberal policies, business ensured its strategic place in the post-apartheid era. Business thrived on the unpreparedness of the ANC on the economic policy front and wined and dined influential players to influence the majority-led government towards the liberal open free market system. Industry used a highly successful tactic to severely undermine the ANC's long-standing goals for economic redistribution. This was despite the period's neo-liberal convergence, the fall of the Soviet Union, and the failure of many African republics focused on socialism (Bond 2000:54). GEAR marked the triumph of neoliberalism over social democracy in South Africa (Williams & Taylor 2000:33). Just like business did with apartheid political leaders, when they acceded to capital's demand, giving them shares in Afrikaner businesses, capital rewarded some of the influential key post-apartheid political players with shares, directorship, and BEE deals. The allocation of equity in JSE listed companies through BEE deals has mainly benefitted black political elites and their families.

South Africa's robust economic liberalization and rapid integration into the global economy have expedited outflows of capital, instead of effectively addressing profound financial discrepancies, extensive multidimensional poverty, inequality, and joblessness (Ndikumana *et al.* 2020:i). The government's authorization of capital flight by means of lifting capital controls in GEAR serves as an illustration of a misguided

²³⁷ The Rembrandt Group was formed in 1947 by Dr N Diederichs, Dr A J Stals, and Anton Rupert, from the Voorbrand Tobacco company, together with the *Broederbond* secretary, IM Lombard, and the racist apartheid enthusiast D W R Hertzog (O' Malley n.d.).

neo-liberal program (Marais 2011:114). Individuals with considerable financial resources have engaged in tax evasion, alongside the profit-shifting strategies employed by domestic and foreign corporations operating within South Africa. This phenomenon is the probable cause for the continuous outflow of capital from the country (Ndikumana *et al.* 2020:30).

The government's capacity to tax total resident income has diminished due to the challenges associated with imposing taxes on foreign wealth and the income derived from it. This has marked a reduction in the resources accessible for financing domestic investment, leading to an augmented necessity of seeking loans from international financial institutions, consequently intensifying the burden of foreign debt (see Shimwela 2002:viii). While the spinoffs of market liberalism have been the state collection of revenue through business taxes, and community involvement through corporate social investment, these have not been enough to influence the socio-economic challenges faced by black people. The historical phenomena of colonialism and apartheid, characterized by the significant allocation of the nation's wealth towards white European immigration, have resulted in enduring legacies that continue to exert considerable influence on the political, economic, and social fabric of the nation (Anwar 2017).

To solve the nation's lopsided economic ownership patterns by government, radical economic transformation' is needed (Anwar 2017). Neo-liberal macro-economic policies have not worked to advance the lives of black South Africans in almost three decades of democracy. A new economic policy paradigm is needed to address the challenges of post-apartheid South Africa.

Zacchaeus' micronarrative exemplifies the ethical and moral commitment of what should be done if profit is amassed as a result of fraudulent action under a tyrannical system. It is an example of how the elite who benefit from crooked systems can make right by the ordinary people which they rob. It places a moral obligation on businesspeople who thrive in maximising profit at the expense of the people, to make restitution for the suffering induced in the lives of the vulnerable and defenceless communities. In this regard white businesses, particularly English multinationals in the mining sector, and Afrikaner businesses, who benefited grossly from apartheid loot,

have a moral obligation towards the economically powerless and landless black masses, who make up most of the South African population today.

Business cannot abdicate the responsibility of addressing the apartheid colonialism legacies to the state when they played an intricate part in creating those problems. White business needs to aggressively divest its wealth to help solve South Africa's triple challenges of poverty, inequality, and unemployment. The mining sector also has a duty to invest its profit to uplift the poor mining communities, townships, and squalors that they help create through the expropriation of black men as cheap labourers in white-owned mines and firms.

The corrupt, black-led government²³⁸ that is fast losing its political hegemony, must also reorient its economic policy-perspectives to direct energies to broaden the black middle-class. Black industrialists must be promoted who will create jobs for the majority black people and empower them to be active participants in the labour market, and the mainstream economy instead of relying of state welfare grant system. The neo-liberal free-market system cannot be the right tool to achieve that goal. It is a form of neo-colonialism that has promised the powerless black masses the illusion of freedom, whilst deepening landlessness, inequality, and poverty in post-apartheid South Africa.

The deification of capitalism and the neo-liberal free-market systems in the name of economic orthodoxy, promotes individualism, capital accumulation, and profit generation, warranting the Lukan criticism of wealth divestment for the benefit of the poor. Luke raises doubts about the benevolence of markets and the uncritical conformity to their regulations. Instead, he promotes the renunciation of material possessions and a display of compassion towards the impoverished, while Christians who possess wealth are encouraged to consistently renounce their Mammonist convictions (King 2019:299).

6.7. SUMMARY

Luke's radical message for economic justice has been the primary thesis of this study, epitomized by the words of Zacchaeus in Luke 19:1-10. The three tenets of the study

²³⁸ For marked corruption deemed 'sins of ascendancy' by the black-led government see (Motuku 2018).

have been sufficiently canvassed in the chapters that make this study. The first deduction, namely that *Luke's message on wealth and poverty is radical*, has been argued in Chapter 1 by introducing the argument, and in Chapter 2 by exploring wealth-poverty issues in Luke with a focus on the twin Lukan message of 'good news to the poor' and 'wealth renunciation'.

The second deduction of the study, *Zacchaeus' resolve in Luke 19:1-10 is taken as a radical response to the Lukan radical message on wealth and poverty, and has radical socio-economic implication for him personally, the Graeco-Roman world, and for those who lived in the early Christian context*. It has been contended for in Chapter 3 by focusing on the grammar, narrative setting, and history of interpretation of the Luke 19:1-10 micronarrative, and in Chapter 4 by focusing on the Roman Imperial economy and its power differentials.

The third and final deduction of the study, *Luke's radical message is relevant in addressing the colonial-apartheid legacy, and the post-apartheid socio-economic ills besetting the democratic South African context* has been demonstrated in Chapter 5 by tracing the colonial, apartheid, and post-apartheid economies and highlighting their beneficiaries, and victims. It has been argued in Chapter 6 by applying Zacchaeus' resolve on contemporary post-Apartheid South Africa as a paradigm for justice and reconciliation.

6.8 CONCLUSION

This study has highlighted the radical Lukan twin-message of 'good news to the poor' and 'wealth renunciation' in favour of the poor. The first-century Roman-Palestinian agrarian economy, its institutions, systems, and structures were analysed to foreground the radicality of Luke's message. It was argued that this radical Lukan message is not only spiritual, private, and personal; it is also political, affecting public and secular institutions, structures, and systems. Zacchaeus's response in the Luke 19:1-10 micronarrative was viewed as a radical response that epitomizes Luke's radical message, with radical spiritual and socio-economic consequences, for him personally, and for the Graeco-Roman world. This radical response was viewed as a paradigm for personal genuine justice and reconciliation between Blacks and Whites. It promotes the transformation of colonial apartheid legacies, manifest in economic and

political institutions, systems, and structures in post-apartheid South Africa, contributing to race relations, and nation-building, in society.

The aim of this study was not to pit black South Africans against white South Africans but to make a theological contribution to Lukan scholarship, and public life and discourse. Darko (2023) warns against employing theological methodologies that pit one race against another. The tendency to quarantine the radical message of Luke in our consumer society generally, and in the South African race discourse specifically, is counter-productive (King 2019:302). Race relations in post-apartheid South Africa are already at a low. I have simply used an anti-imperial reading to highlight the extent of the breakdown, the reasons for that breakdown, and how Luke's moral vision on wealth-poverty issues can help repair them. Resistance has emerged because of the ANC's transition from liberation to liberalism. This engages in detailed debates on various topics and makes small yet meaningful steps towards a future that champions longstanding principles of economic equity, gender equality, and racial equality (Bond 2006:153). In this sense, the concern and care for the voice and welfare of the formerly oppressed African black majority, who constitute the majority poor in South Africa, is pivotal (cf. King 2019:289, 292).

The Achilles heel of many post-independence and post-liberation African countries has been the difficulty of fostering common citizenship between previous warring parties (Mamdani 1996). Thus, the endeavours of the nation to establish a collective South African sense of self have encountered hindrances due to racial disparities and the enduring consequences of the apartheid era. These actions resulted in many black individuals living in poverty while white individuals enjoyed superior economic status (Gumede 2021). The onus rests with white South Africans to do more to remove the blight of colonial and apartheid oppression, redeeming their image as colonial and apartheid oppressors. They should demonstrate through their socio-economic deeds (not just rhetoric) that they are true South Africans who are prepared to make post-apartheid South Africa work. This is the 'costly reconciliation' needed, to earn the forgiveness of the black victims of apartheid colonialism and partake in the commonly shared destiny with black South Africans. In the same way Zacchaeus redeemed himself, by divesting his wealth and making restitution for the economic wrongs he committed, enrolling himself in the community as a son of Abraham. White South

Africans need to go beyond the bare minimum prescribed legislative frameworks, policy charters, and constitutional outlook, and move into the realm of conscientious morality and ethics based on genuine repentance²³⁹ from apartheid colonialism crimes.

In relation to the way individuals ought to manage their possessions, the gospel of Luke presents a valuable concept of an ideal society. Individuals should withstand the temptation of material wealth and engage in acts of solidarity with those in poverty; while acknowledging their own contribution to oppressive social structures They should strive for their transformation, and persistently reject the principles of consumer capitalism (King 2019:308). Whilst guilt is good enough to evoke conscience, white South Africans must rise beyond guilt-induced paralysis. It is required to lend a hand to the poor black masses, standing side by side with them, in determining their own future, without being caught up in a messianic complex for black people (cf. Tinker 1994:53). Alongside Christians from developed nations, it is imperative for the white population in South Africa to be conscious of the privileges associated with their societal position, acknowledging the disproportionate advantages they receive because of intangible social frameworks. The time has come to actively engage in building connections with individuals who exist beyond their immediate social confines (without being charitable or paternalistic), championing the cause of social transformation, and constructing a more just and egalitarian society on both domestic and international levels (cf. Peters 2014:10).

Theology and church have played a critical role in constructing racial categories and economic abuses in South African history. This study is a theological contribution in undoing apartheid colonialism legacies.

The 'Zacchaeus moment' equivalent to an economic CODESA is necessary for contemporary South Africa. The parameters of the settlement after 1994 may disintegrate entirely when the consequences of the neo-liberal agreement become increasingly evident to the majority of South Africans (Davies 2012:404). The unique combination of newfound political influence lacking financial resources and established

²³⁹ The Lukan 'Spirit motif' is helpful in this regard, since the Spirit is the agency in Jesus' ministry, making much of the events, and encounters in the Lukan narrative, and the life-changing encounters with the Lukan Jesus possible (for more on the 'Spirit motif' in Luke, see Khathide 2007).

wealth lacking political clout continues to propel the political economy of South Africa (Southall 2008:297). Ordinary people are meanwhile suffering collateral damage in this elite power contest. Zacchaeus teaches us that the only way for the oppressor to reconcile with the oppressed is to do justice by restoring what rightfully belongs to the oppressed. Whilst the oppressor needs reconciliation with the aggrieved, wronged party, the oppressed need justice. This delicate balance between reconciliation and justice is what South Africa needs today.

6.9 LIMITATIONS OF THE STUDY AND FURTHER RECOMMENDATIONS

I have chosen the anti-imperial stance within the three theoretical frameworks in Lukan studies, the remaining two being pro-empire, and ambivalence stances. A temptation exists to read too much into Luke's appropriation of imperial titles and symbols to Christ and his mission, as a form of anti-imperial language. Thus, the anti-imperial method is susceptible in this regard. By not extending the investigation to the Lukan second volume, I have limited what would otherwise have been the application of Luke's radical message to the life of the embryonic church in Acts. My reading exhibits the primitive stance view, in the Roman economic debate between primitivism and modernism. Conversely, my reading of South African history leans towards Marxism, and that informs my criticism of the liberal view and neo-liberal free-market economic policies of post-Apartheid South Africa. I, however, regard this reading as credible and substantiated by empirical evidence both in scientific data and real-life situations. My race and class location/identification was as an African black man, who grew up in an apartheid Bantustan in Bophuthatswana, and later moved to Soweto Meadowlands (perhaps the heartland of the resistance movement). This, coupled with my rearing by a single grandmother and mother, who were both victims of forced removal from Sophia town to Soweto Meadowlands, informs my pro-poor bias.

There remains room to extend the study to the Acts and see how this Lukan radical message plays out in the community life of the early church, and how the Lukan voice in Acts would play out in the church, and post-apartheid South Africa today.

The study has mainly focused on black Africans in its application, and it would be interesting to include the oppressed in general (Indian and coloured people) and

assess how colonialism and apartheid have impacted them and how they are progressing in post-apartheid South Africa.

The emphasis has been on the Bantu tribes of South Africa, and an inquiry focusing on the fate of the remaining communities of the indigenous Khoisan group in post-apartheid South Africa is a worthy suggestion. In contrast, women have been affected differently by the apartheid colonialism ordeal (see Pillay 2016), making gender differentials a recommendable avenue for further exploration.

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