BENEVOLENT AND CHARITABLE ACTIVITIES IN THE MING AND QING DYNASTIES: PERSPECTIVES ON STATE AND SOCIETY IN LATE IMPERIAL AND MODERN TIMES

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For several years scholars have been interested in the benevolent and charitable activities of officials and elites in late imperial China. Some studies have looked at particular institutions, while others have looked at individuals engaged in benevolent activities. The 1997 publication of FUMA Susumu's 夫馬進 [1] and Angela LEUNG's (Liang Qizi 梁其姿) [2] represents the culmination of two major scholarly efforts to grapple with these important activities defining important characteristics of late imperial China's social and political order. Their work helps us to consider state-society relations in new ways. Understanding the changing relationships among official and elite roles over time in turn gives us a valuable perspective on certain political and social dynamics affecting not only late imperial history but also twentieth-century political and social changes.

The range of benevolent and charitable activities and institutions in late imperial China was quite broad. There were institutions devoted to specific target groups, such as widows and orphans. There were also charitable activities including poor people more generally, especially in times of famine when they were especially vulnerable. The motivations of officials and elites organizing these various activities and institutions could also be quite varied. Few probably acted out of purely philanthropic sentiments. Some officials and elites, for instance, thought about the instrumental benefits for social stability and order. In some cases, such as the provision of boats to save people from accidents on the water, this service in many twentieth-century settings would have been provided either through insurance or a government sponsored organization. It would, however, have been rare in earlier times to find a large government effort to manage such activities. Such activities, in China, as elsewhere, were difficult to sustain as private and voluntary activities because funding was never secure and the organizational energy to sustain the activities could easily fall short of what was needed. Yet despite these limitations, Angela Leung finds over 3,200

benevolent organizations in her survey of over 2,000 gazetteers for the Qing dynasty [2] [1].

Though the scale or extent of the impact of charitable activities on society are hard to measure, we can at least discern the direction of the economic and demographic impacts: 1. Sustaining the consumption of poor people who might otherwise starve, thereby reducing mortality; 2. Keeping babies alive and thereby reducing infanticide and infant mortality; and 3. Allowing widows to remain chaste rather than being forced for economic reasons to remarry. 1 and 2 both reduce mortality, while 3 may reduce fertility. The overall demographic impacts were likely quite limited. More important perhaps were a different kind of social impact —helping the poor helped to prevent potential social unrest should they decide to make visible and forceful demands. Quite separately, such efforts affirmed the symbolic value of charity and benevolence to the definition of a moral person.

The social foundations and political logic for late imperial charity and welfare activities were laid in part by Zhu Xi and other Song thinkers who addressed the formation and maintenance of local institutions of social order at a time when commercialization and urbanization based on increased agricultural productivities, transportation developments and new migration patterns meant the creation of new kinds of poor people who, if left unmanaged, could have become seen as a threat to social stability. The social logic articulated by Zhu Xi regarding the formation and maintenance local institutions of social order stressed the roles of local elites, in particular those well-educated individuals committed to a Confucian agenda of activities who could create institutions including granaries, schools, charitable estates, and village compacts. In practice, however, officials often played significant roles. The relative importance of officials and elites varied both temporally and spatially in the succeeding dynasties. Confucian ideas were also supplemented on occasion by Buddhist commitments to good works. We are accustomed to thinking about officials and elites as antagonists consistently competing for power over local society. We tend to see official and elite activities as separate and distinct from each other. While there were certainly disagreements and conflicts as well as moments when elites sought greater autonomy, officials and elites more generally shared a common agenda for creating institutions of local social order, among which were benevolent institutions.

A high point for founding benevolent institutions, especially by elites, came in the late Ming when an increased number of orphanages and famine relief operations were mounted. Fuma Susumu refers to the link between some of the people who formed benevolent institutions and those who belonged to the Donglin movement [1] [2]. These connections suggest important ways in which a plan for promoting local stability and political

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1. P. 2.
2. P. 92.

order was tied to a specific understanding of the problems in central administration. Angela Leung has noted that prominent elite members founded many of late Ming benevolent associations. But it may be easy to exaggerate the degree to which these elite efforts were independent of the state. Just as we conventionally neglect the ways in which the Donglin movement was a critique of specific phenomena in central government by both officials and non-official elites, preferring instead to stress the Donglin opposition to the central government, so too we tend ignore the role of officials in founding benevolent associations. A stress on the elite nature of these activities by some American scholars, led by William Rowe and Mary Rankin, brings us to see a "public sphere" beginning in late Ming China that was in several ways parallel to the arena so labeled by Jurgens Habermas in his study of early modern Europe [3, 4]. But more important than the official or non-official sponsorship of benevolent associations in either the late Ming or the nineteenth century was the very local character of their construction. Certainly what changes during the eighteenth century is the growing role of officials in promoting and coordinating the spread of welfare and charity activities. The relationships formed between officials and elites for these purposes do not seem very similar to the political activities of elites most usually associated with the "public sphere" in early modern Europe [7].

From evidence on roles of officials and elites in the formation of community granaries and schools in the eighteenth century it appears that officials were more likely to play a leading role in the administrative centers of less economically prosperous and often more peripheral locales while elite establishment of these institutions was more common in richer areas [8]. There was a widespread social and political commitment to the two sides of the "instruct and nourish" (*jiaoyang* 教養) precept of governing shared by officials and elites. The benevolent associations studied by Fuma and Leung were not established over as broad an area as either granaries or schools. Most were located in richer areas, especially in Jiangnan. Thus, the spatial pattern found for other local institutions is not going to be as salient. Nevertheless, some spatial variations emerge. Fuma finds that gentry and merchants were more important to founding orphanages at the prefectural level, while officials were more prominent at the county level. This observation probably reflects the relative importance of county-level administration as well as the presence of elites at the usually larger prefectural seats [1] [3]. Based on Leung's data, it appears that when there were several benevolent associations within a single county the role of non-official sponsorship was generally high; otherwise officials appear in general to be given more credit for founding benevolent associations [2] [4]. In particular she notes that officials played a considerable role outside the Jiangzhe region, an observa-

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3. P. 231.
4. P. 259-315.

tion that resembles those made in earlier scholarship on official and elite roles for community granary and school formation [2] [5].

Where officials played a larger role in founding institutions of local order, including welfare and benevolent associations, their welfare or benevolent activities could become part of a broader set of official functions that were supervised or at least monitored to some degree by a vertically integrated bureaucracy. When and where non-official sponsorship was more common, however, these benevolent associations could be more easily integrated horizontally into a network of local institutions. In other words, benevolent activities could become integrated into a bureaucratic political structure or become enmeshed with other activities in a small local area. The relative importance of these two possibilities changed over the course of the Qing dynasty.

When we examine more closely the temporal pattern of welfare and charity association formation, the importance of officials to the expansion of institutions like orphanages parallels the broad outlines of granary formation previously studied by Will and Wong [6]. Leung's analysis of eighteenth-century developments identifies numerous cases of orphanages established, funded and managed by elites between 1655 and 1724. Beginning with initiatives undertaken by the Yongzheng emperor, there came a bureaucratization of welfare activities within which the efforts of elites remained crucial, but these efforts were now part of a larger government effort. Leung notes an important social change between the late Ming and eighteenth-century situations regarding elite participation. Whereas prominent degree holders sometimes created the smaller number of late Ming benevolent associations, the managers of Qing associations were often lower-level Confucian scholars and students [2] [6]. Perhaps the status of individuals involved with these activities declined as the activities became more common and as the government played a more prominent role in oversight. It may well be that upper echelons of the gentry elite were less willing to work within a subordinate position than others. Leung labels the eighteenth-century situation as "official supervision and popular management" (*guandu minban* 官督民辦), a locution similar to the more familiar nineteenth-century relationship between officials and merchants [2] [7]. The use of this phrase reminds us that the nineteenth-century official turn to merchants for enterprise management extended a political logic well established on a broader basis for other activities in the previous century.

Eighteenth-century welfare and charity operations depended on a combination of official and elite efforts, with the mix of efforts varying spatially. A distinguishing characteristic of the spread of benevolent activities was their frequent location within larger vertically integrated structures. This is

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5. P.129.

6. P. 245.

7. P. 129.

perhaps most true of the granary system where the accounts for many small and scattered community granaries were brought under a bureaucratically structured reporting system, but for charity operations like orphanages, Leung makes very clear the role of imperial initiative in expanding the numbers of these institutions. In contrast, for the early nineteenth century Leung notes the establishment of increased numbers of benevolent associations, each more closely associated with a smaller area than earlier associations had been. Distinctions between "inner" and "outer" as a way of drawing boundaries for individual areas served became more frequent [2] [8]. Once again these findings complement what was earlier discovered about changes in granary management. For granaries, it is clear that vertically integrated bureaucratic management and coordination was in decline by the early nineteenth century; those areas that succeeded in sustaining granary reserves often relied on initiatives by local elites [6] [9]. The increasingly local nature of welfare efforts allowed their greater horizontal coordination within a small area. In cities, like Shanghai, this meant the new development of multi-functional benevolent associations supported a broad spectrum of activities including support for widows, orphans, and coffins [1] [10].

Other changes between the eighteenth and nineteenth century concerned the substantive foci of charitable labors. The eighteenth-century concern with widow chastity reflected a broader moral concern with the projection of ideal family forms, while the late nineteenth-century efforts to expand the kinds of aid available to families with newborns who might otherwise die suggests an increased anxiety over infant mortality. The formation of associations offering aid to newborns reached more deeply into the country-side and supplied the smaller number of orphanages located in more urban settings with those babies whose parents could still not care for them after 5 months of initial welfare support.

There were also changes in the financing of benevolent associations, especially those in larger cities, about which we learn from Fuma Susumu's studies of specific examples from Songjiang, Hangzhou and Shanghai. Much like individual urban granaries that owe their success to elite efforts and for which rich documentation exists, benevolent halls have occasionally left detailed sources. Much of the detailed material assembled by Fuma comes from the 1860s or later, though the documents sometimes include information on earlier periods. Successful benevolent associations of this period solved the problem of insecure funding that had bedeviled eighteenth-century efforts. When the Yongzheng emperor promoted the founding of *pujitang* 普濟堂, he expected people to make "contributions", but as the Qianlong emperor discovered shortly thereafter, officials sometimes forced people to "contribute". If such problems were to be avoided, the funding had

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8.   P. 232.
9.   P. 75-92, 418-429.
10. P. 649-671.

to come from the wealthier people. Occasionally local elites and officials would give land from which the rental income could go to support benevolent activities, but more commonly they simply gave money, the total resources available then varying from year to year with the numbers of people making contributions and the size of their gifts [1] [11]. As a result, many associations found it difficult to sustain their activities for more than a few years; those that were successful in the eighteenth and first half of the nineteenth century were those that received periodic infusions of new resources.

Funding for some urban benevolent associations in Hangzhou and Shanghai became far more regular in the second half of the nineteenth century when particular guilds began to support specific associations. Fuma presents cases of guilds that essentially taxed their members to support benevolent activities as well as cases where the funds were given more flexibly. From the perspective of local officials who were often actively involved in promoting the success of benevolent associations, there was a kind of routinization of benevolent activities in urban areas that affirmed the joint efforts of officials and elites. But from the perspective of higher-level officials, benevolent activities were not ones they sought to promote and coordinate over larger spaces spanning more rural as well as urban areas. As a result, benevolent associations became increasingly divorced from larger political structures and visions as they became enmeshed within increasingly dense sets of local social and political institutions. How can we understand these changes? For her part, Leung argues that Chinese benevolent associations generally fit within a longer tradition of Chinese self-governing organizations not limited to urban areas, including, for instance, north China peasant associations [2] [12]. They fit, for her, within a "public sphere" or "civil society" context. Fuma, in contrast, points us forward; looking at some late nineteenth-century cases he evaluates earlier arguments that benevolent associations were the foundation for the development of self-government initiatives in cities.

For both Leung and Fuma the possibility of benevolent associations being independent of the state is important. The possibilities, however, may well be different in rural and urban settings. In more rural settings peasants form various kinds of voluntary associations in part because the state rarely can penetrate to the village level, at least not on a routine and wide-ranging basis. In urban settings that are not administrative centers, the organization of social order depends on merchants and other urban elites to create institutions. The scale of challenge is obviously different in the two cases. When we leave the village level and consider the relative roles of officials and elites in the formation of local institutions, both those conceived as charity associations as well as others, we find increasing numbers of

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11. P. 493-540.

12. P. 250.

organizations the more economically and politically important the area is. At the same time we find the roles of elites increasing relative to officials in the formation and maintenance of these organizations. I've already mentioned this relationship for eighteenth-century granaries and schools. It is also true for a broader range of late nineteenth-century associational forms as Keith Schoppa's work on four zones in Zhejiang demonstrates [5]. It seems easier for officials to retain a prominent role in less economically developed areas than in more developed ones. Moreover, the possibilities for linking locales vertically through a bureaucratic hierarchy are greater across less developed areas because officials play relatively more important roles. It therefore makes good sense that the places most likely to make the strongest claims for autonomy are more central locations with more developed elites.

Turning to these more urban environments where we find a greater number and diversity of local organizations, the changes of the late nineteenth and early twentieth centuries were especially dramatic. In this context, Fuma's analysis of the membership of benevolent associations and self-government organs is revealing. He discovers that many of the individuals who are prominent in benevolent associations are also part of the leadership for self-government initiatives. These connections raise several possibilities. Fuma notes some similarities in the organization of benevolent associations and self-government associations as well as a common kind of motivation for leaders to organize community institutions [1] [13]. The continuity of leadership also makes clear how new ideas and institutions didn't mean that "new" men were the leaders. What changed more than the kinds of individuals or their orientation toward community service was what they saw as necessary and possible in light of foreign ideas and local realities. More specifically they came to see their roles in "political" terms rather than "social" ones.

The neo-Confucian agenda for political and social order deftly avoided many sharp divisions between what was strictly "political" and what was only "social". Instead there were a set of activities pursued jointly by elites and officials that varied both temporally and spatially. Crucially, there were few, if any, sharp divisions of labor regarding the duties of sustaining social order. Because officials and elites generally agreed on how social order should be constructed they had very few disagreements over the principles defining their respective roles. Of course there were disputes over particular issues as well as acknowledged differences of interest regarding specific topics, but official-elite relations in a neo-Confucian social order lacked the bases for division between officials and elites typical of early modern European history [6] [14]. In the late nineteenth century, in part inspired by foreign models, Chinese urban elites became engaged with constructing municipal public order. As municipal government operations developed in

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13. P. 682-689.

14. P. 105-126.

Chinese cities, there was a parallel expansion of voluntary associations of elite members to pursue a variety of economic and social activities. Charity work was increasingly conceived in Western terms as a non-governmental morally motivated kind of voluntary activity, a kind of social project at most loosely tied to formal government. These Western framings in fact reinforced Chinese official aspirations to limit the political dimensions of elite associational activities, a response to elite efforts to claim larger voice in political affairs beyond the urban centers they helped organize and order. It was a late nineteenth and early twentieth-century Western framing of charity that made "modern" the Chinese official push to distinguish what is "political" from what is merely "social". This effort had several dimensions. First, officials sought to make the urban associational activities of elites either "social" or "economic" and not "political". Thus they sought to keep various social and economic organizations from pressing claims for political voice. Second, officials sought to mobilize elites in ways that they had in earlier times in order to affirm what had been their conventional cooperation.

Consider briefly the early twentieth-century opium suppression campaign. The state's strategy for suppressing opium depended fundamentally on mobilizing elites to share in this project of recreating a social order morally reinvigorated by the eradication of the opium blight. In pursuit of this end, the government promoted the founding of anti-opium societies to be headed by gentry and merchant leaders. As gentry elites had been entrusted with the Neo-Confucian agenda for local order in earlier centuries, now they and merchants were called upon to combat a threat to social order as great as any peacetime danger the empire had ever experienced. The government wanted to mobilize elite support for promoting social order without sanctioning a more formal political role with enhanced and specified powers. Thus a set of government regulations on opium suppression with regard to anti-opium societies states "Such society shall be purely for the anti-opium smoking, and the society shall not discuss any other matters, such as political questions bearing on topical affairs or local administration, or any similar matter" [9] [15]. Another set of regulations called on all local officials to "instruct reputable gentry and merchants in their jurisdictions to organize Anti-Opium Associations and to publish pamphlets and magazines in simple language to exhort people to break off opium smoking. These publications should not interfere with politics or subjects outside of their province"[9] [16].

Managing the competing aspirations of elites for more formal political roles and officials for circumscribing certain elite activities to a more sharply defined social sphere meant that urban benevolent activities could be motivated by a range of sensibilities spanning Western-introduced Christian ideas to the more indigenous Chinese sensibilities linking welfare with social order and stability. Certain basic dynamics of political change in Qing China

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15. Vol. 2, p. 81.
16. Vol. 2, p. 85.

are reflected by the ways in which welfare and local order were conceived and constructed — a weakening of vertically integrated bureaucratic coordination of welfare activities meant that more local, elite-centered efforts in larger urban centers and their immediate hinterlands replaced a broader system of more limited activities under official supervision. In Europe, by contrast, it is only in the latter part of the nineteenth and especially in the twentieth century that a range of welfare functions is taken on by some central states. In earlier periods a combination of church, local civic, and local government organizations addressed European urban welfare issues, leaving the countryside largely on its own.

The differences in the directions of change in welfare policies initially appear to support broader and conventional contrasts of state building in Europe and a collapse of empire in China — European states take on welfare responsibilities as part of an expansion of state functions as the Chinese empire's bureaucratic capacities to address welfare needs declines. But a longer time horizon repositions this contrast. In the mid-twentieth century, the Chinese state reasserted a country-wide set of subsistence policies to promote food supply security and achieved a basic welfare goal. In the late twentieth century, Western states dismantled to varying degrees the welfare infrastructures they had previously built, depending increasingly on initiatives by local government and by private sector charity. The "direction" of change in the scale and locus of welfare efforts depends upon the temporal endpoints we choose. We discover that there are structurally similar ranges of policy options and institutions in China and the West. Choices in both are made between public and private welfare initiatives and between local and central government responsibility for various welfare activities.

Closer examination of these structurally similar situations, in particular the political construction of the categories within which welfare activities have been conceived, alerts us to important differences in the broader historical dynamics within which welfare activities have been located. The expansion of welfare activities by Western states was a response by governments to growing popular demands for state intervention. Governments and elites came to see welfare activities as a key means to promote social stability. While the general insight is one that Chinese rulers had first articulated more than two millennia before and upon which they based many of their subsequent policies, the particular ways in which these concerns became enmeshed in larger political visions in China and Europe differed. Exploring these kinds of differences more closely promises to tell us more about how states, elites and common people engage each other historically and today.

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