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AN ECONOMIC FRAMEWORK FOR GENEALOGICAL RESEARCH?  
Dr Wilhelm Bernhardt  
(wbernhardt@vodamail.co.za)

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*Dr Bernhardt (A1B1C9D2E1) is a descendant of a German mercenary (A1) with the same name who came to South Africa from Germany via Britain in 1856, as a member of the British-German Legion and his wife Dina Susanna Swanepoel, a Boer girl, born and bred in the Koue Bokkeveld in South Africa.*

*Dr Bernhardt has already published the story of his ancestor's arrival in South Africa and is currently finalising the family register of the Bernhardt family in South Africa. In this article he investigates the possible guidelines for and the contents of an economic framework to support genealogical studies, with special emphasis on the drafting of timelines. The author's interest in these themes arises from a question that is fundamental to his interest in genealogy, namely what boundaries, if any, exist for genealogical research. When are we, and when are we no longer, engaged in genealogy and what can be done to stimulate the continuous growth, renewal and enrichment of this discipline? It is the author's point of departure, as explained in this article, that genealogical activities can be divided into a spectrum of at least five mutually supportive fields of interest that can benefit from these shared methods of research. One method that can support all five types of research, to a greater or lesser degree, in the genealogical spectrum, is the author's proposed economic framework for genealogical research and the associated timelines.*

## **INTRODUCTION**

Recently a friend sent me what is largely an autobiography of his father, a former magistrate who had died in 1978. The small number of pages are filled with basic genealogical information, including the identities of his father's parents and grandparents, as well as the names of his children and their dates of birth. However, it also includes geographic and chronological facts, such as the whereabouts of the family at certain periods; some political information (e.g. that his father was a member of the Ossewa Brandwag and the National Party); as well as sociological data (the father's offices and his role in the church and society, as well as how he experienced his Afrikaner identity during a specific era). Finally, what is also significant, is that the economy ran through the narrative like a golden thread, throughout this man's life.

Virtually every decision he had made was either influenced by economic factors, or his decisions had some economic consequence. His writing is replete with references to his family's constant wanderings in search of better farming opportunities; references to the impact of the locust plagues and the Great Depression; stories of the fluctuating prices of

corn, meat and wool; and how he was unable to follow in his father's footsteps as a farmer, due to the confluence of unfavourable economic factors and how he consequently embarked on a successful civil service career.

Considering the above-mentioned data, the question arises: what is a genealogist? Does genealogical study involve more than the search for and arrangement of family registers? Should it not be more than just that? When are we no longer engaged in genealogy but rather in sociological research, compiling a biography or mere storytelling? Is there something like a purely genealogical field of study or does genealogy consist of a merging of several disciplines that are united under the umbrella of an interest in the unfolding of genealogical lines over time? In a recent article on the eGSSA website (2019/02/05) "Kosmos en Kakiebos", compiled by Kobie Ströh), the origin of "Kakiebos" (a weed) is discussed. This article clearly contains no geographical information. Is it still "genealogical" research if "genea" is absent, or is it literally just interesting background?

In the continued search for answers to these questions, there is at least one solid anchor. This anchor is the mother-child relationship that exists between history (on the one hand) and genealogy (on the other.) In my view genealogy is basically nothing more than the study of history on a micro-level, namely the history of the individual and his or her family ties. If historians – as is well known – do not hesitate to use knowledge generated from other fields of study, such as economy, to enrich and contextualise their insight into historical events, there should also not be major objections if genealogists do the same to gain more insight into the affairs and activities of individuals and families. From this point of view, history and genealogy have one obvious critical characteristic, namely the emphasis of both on the chronological unravelling of events and the associated focus on the use of timelines as an essential method of research.

This twin perception leads us, in a roundabout way, to the very purpose of this article, namely a proposal of a structured economic framework for genealogical study that can serve to enrich most types of genealogical research, and that at the same time will promote the use of timelines as a genealogical aid. Thus, the article starts with a short overview of the different categories or types that differentiate genealogists, mainly to establish who the potential "users" or "target market" of such a framework will be. The article then progresses to a proposal of an economic framework, followed by an indication of the different types of questions genealogists may raise to aid them in their research, to guide them or to enrich their research. The article concludes with a brief reference to timelines and the application possibilities of this proposed economic framework.

## **THE FIVE CATEGORIES OF GENEALOGICAL RESEARCH**

It appears as if two main, seemingly contradictory schools of thought on the fundamentals of genealogy came into being over time. On one side there was a narrower interpretation of genealogy that focused primarily on family lineage, whilst on the opposite side we have the broader focus that strives to incorporate genealogical lineage into the larger context of political, economic, social, technological, legal, and environmental variables, timelines and narratives.

The group with the narrower line tends to focus mainly on answering the "who", "where" and "when" questions concerning family descent; the second group investigates, over and above that, also the "why", "what", "for what reason" and "how" issues. The basic

difference between the two approaches is seemingly that the group with the broader interpretation believes a genealogist should consider the bigger picture and timelines if he/she wants to get a clear understanding of the genealogical register of an individual or family. On the other hand, followers of the narrower interpretation are satisfied with the basic genealogical information of the individual when compiling a family register.

The abovementioned difference should not be taken too seriously, as it can lead to oversimplified stereotyping. In my opinion, it is more acceptable for the sake of debate to regard genealogy as an investigating discipline on a spectrum of mutually supportive types of activities. In this regard, I would suggest differentiating between at least five main, sometimes overlapping, types or categories in the genealogical spectrum, namely:

### **1) Type 1 Genealogical Study:**

The "pure" or "traditional" genealogist, for whom the lineage of descendants and the compilation of family registers is the main priority. This group and their associated activities can be looked upon as the "basis" and "fundamental" principle of genealogy as a scientific activity. This still constitutes the mainstream of genealogical activity and provides the standard of investigation for genealogical research.

### **2) Type 2 Genealogical Study:**

The "bigger picture" of the "inclusive" genealogist for whom lineages of descendants are just as important as they are for the "pure" genealogist, but who would also like to understand the bigger picture of the people involved, and therefore often placing additional emphasis on investigating aspects, such as the motives for choices made by individuals, compiling narratives about people's lives, the confirmation of the chronology and timelines, the placing of the individuals' stories within the bigger historical, sociological, religious, and economic contexts; the human history of inherited objects, as well as scrutinising of the historical correctness of family tales, myths, secrets and scandals retold through generations.

### **3) Type 3 Genealogical Study:**

The "bigger picture" genealogist who, besides "lines of descendants" and the inclusive "understanding" of human elements underlying them, wants to go further by looking at the broader trends or larger patterns within a family or chosen group. The typical questions these genealogists ask are: How many of my family members were "Voortrekkers", where did they migrate from and where did they settle eventually? Which medical deviations feature in my family and could I distinguish any tendencies in this regard? or What is the origin and transmission pattern of a specific name combination that exists in a specific family?

### **4) Type 4 Genealogical Study:**

The "supportive" or "data-provider" genealogist who specialises in collecting and releasing the primary sources of genealogical research data for use by other genealogists. In this group are genealogists who would photograph electoral lists in the archives, those who transcribe the content of long-forgotten newspapers in digital format, those who unlock death notices, marriage certificates and birth registers on the "FamilySearch" website.

## **5) Type 5 Genealogical Study:**

The “casual” or “incidental” genealogist who does not really specialise in genealogy, but rather pursues another discipline, like history, sociology, health or economy, and who makes use of genealogical information casually or as opportunity arises to illustrate a point of view. These genealogists spend their time to research the broader context of genealogy, (such as history, politics, or the economy), but sometimes deem it necessary to explain the role of an individual or a family with reference to their genealogical information. Journalists sometimes fall in this category when they, for whatever reason, find it necessary to make reference to who a person’s parents were; the fact that the person descended from a family of musicians, writers or politicians or others; or that the person’s family had some kind of medical condition.

The purpose of categorising these genealogical fields of study is not to side with or against one or the other of these mentioned types or to elevate one type above another. There is also no intention to start putting genealogists into “tiny boxes” or to introduce meaningless classifications. The reality is that most genealogists will in any case find themselves at some point involved in all five of these types, depending on their personal interest and requirements. Besides, none of these genealogical types is any less intellectually exciting or satisfying than any of the others.

If so, why then spend any time whatsoever on categorising genealogical activities? The answer is twofold: firstly, categorising creates space for the conscious development of type-specific methods, standards and techniques; and secondly because the explanation of the different types can determine if there are methods – like the proposed economic framework discussed below – that can be beneficial to the five types of genealogical studies in some way or other. These possibilities will be addressed in more detail in the sections to follow with reference to the various types of genealogical studies.

### **A SNIPPIT OF ECONOMIC THEORY**

For a genealogist who wants to understand the impact of the economy on the lives of his or her ancestors, it is important to first master the basic concept of “economy”. In etymological terms, the word “economy” derives from the Greek “oikos”, that translates to “thrifty housekeeping” and “nomos” that means “managing” or “ruling”. In its most basic form, the word “economy” refers to the way a household is managed, and specifically the management of a household’s resources, so that the household will not merely survive, but eventually prosper. In this regard, resources refer to labour, land, properties, and capital. Another meaning intrinsic to economy is choice that people (or states at a macro-level) have to make on a daily basis to keep a roof over their heads and food on the table by means of available resources. It is clear that these economic choices are not always easy or obvious, because resources to survive economically and to prosper are limited, or scarce and not distributed evenly. Therefore, economic behaviour is often categorised by conflict of interest, intense competition for resources and sometimes extremely difficult decisions to choose the best options for the individual, family or a state. In brief, the economy is often the determinant in the behaviour (and fate) of individuals and states.

## THE LINK BETWEEN ECONOMY AND GENEALOGY

Against the background outlined above, a genealogist can expect the following types of questions from an economic point of view:

### a) Type 2, 3 and sometimes 5 genealogists:

Was my ancestor, economically speaking, "rich" or "poor"? Why? Which factors determined his or her economic status in society? To which economic resources did my ancestors have access to? Did the economy influence my ancestor's choice of a marriage partner? Can the answers to these questions help me understand my ancestor's other choices in life better? For my part, for instance, I always wondered why my great-grandfather Wilhelm Bernhardt (A1B2, 1866–1939) engaged in marriage so soon after the death of his first wife, Cornelia Adriana Kruger, during the Great Flu of 1919, and married my great-grandmother, the widow Anna Dorothea Vorster (née Du Preez)? The answer to this is likely to be found in the economic circumstances in which both of them found themselves: he was a widower trying to make a living by means of transport using an ox wagon at a time when ox wagons were increasingly being replaced by railway transport. He had two or three young children to raise. She was in a similar situation – a widow whose late husband, Lodewikus Johannes Vorster, worked on the railways, according to his estate papers. She had inherited almost nothing from his estate and had several young children to raise. Is it therefore surprising that they considered a marriage as a possible economically viable way to meet their resource challenges?

### b) Type 2, 3 and sometimes 5 genealogists:

How did my ancestor's economic status influence his/her choices in life? Specifically: were there any economic factors that influenced the course of my ancestor's life? (For instance, to move to the city or to emigrate from Europe to Africa; or to settle as a tenant-farmer (*bywoner*) on someone else's farm; to get married; or to leave his farm and work on the mines or for the railways). Many of us would be surprised to know that the "Great Trek" that so many of our ancestors participated in, was just as much – if not more – driven by economic factors (mostly the lack of land) as by the well-known political factors as mentioned in Piet Retief's well-known Manifesto (the reader may get more information from Prof PJ van der Merwe's well-researched book "Trek: Studies oor die Mobiliteit van die Pioniersbevolking in die Kaap," Cape Town 1945).

### c) Type 2, 3 and sometimes 5 genealogists:

Did the economy influence the circumstances of my ancestors' lives? (Why were they farmers, city-dwellers, villagers or fugitives and what were their living conditions: poor, rich, sickly, healthy, hungry, looked-after, afraid, safe?) Many ancestors of Afrikaners became tenant-farmers (*bywoners*) on others' farms, whilst many often became urbanised. It is strikingly clear that the availability of land, a critical resource in a mainly farming orientated economy, played a definite role in their lives. Many farms could not be further sub-divided into economically viable units and this factor, along with the growth of the railways and later the discovery of gold and diamonds, presented a solution for many impoverished Boer families.

**d) Type 1, 2, 3 and sometimes 5 genealogists:**

Could a smidgeon of basic economics assist one to locate death notices and birth records, or to interpret the estate of a person? If a person's birth records cannot be traced to the nearest town, it is sometimes helpful to consider the family's larger economic centre, as registers of birth and marriages would rather be found there than in the nearest town. Where would the farmer sell his products; in the nearest town or at the largest market and is it not just possible that he would meet his future wife there, get married there and baptise his child there? The point to make here, is that being aware of the economy could aid even the "traditional" genealogist in the search for information, by assisting him or her to formulate hypotheses, which is essentially the questioning we do to steer our research in new directions whenever we reach some dead-end.

**e) Type 4 genealogists:**

What type of economic data do my fellow genealogists need to answer the aforementioned questions? One example of this is the creation of economic timelines of, e.g. a state, a town or district in which the individual lived, or the provision of basic economic data regarding such places (like the typical careers found in a specific town and area at any given time, who owned which farms at a specific time and how were they sub-divided after the death of the owner.) Another example is the provision of data regarding the average incomes of tenant-farmer families or the income of white mineworkers, for instance in the 1920s.

**A PROPOSED ECONOMIC FRAMEWORK FOR GENEALOGICAL RESEARCH**

The foregoing questions and examples beg the question if it would be possible to systematically analyse the role and impact of the economy in a person's life by using a structured methodology. This thinking resulted in an Economic Framework for Genealogical Research, as set out in the table below.

ECONOMIC FACTORS	EXAMPLES
<p><b>Step 1:</b>  <b>Compile a Profile of the person's basic personal economic data</b></p>	<ul style="list-style-type: none"> <li>• <b>Sources of Income</b> (e.g. farming, salary, loans, rent, chance windfalls)</li> <li>• <b>Main economic assets</b> (e.g. land, wagons and oxen, labour and education)</li> <li>• <b>Typical expenses</b> (e.g. size of the family, retirement, cost of living, debt, education)</li> <li>• <b>Financial setbacks</b> (e.g. insolvency)</li> </ul>
<p><b>Step 2:</b>  <b>Analyse the macro-economic driving forces that could have had an impact on a person's life</b></p>	<ul style="list-style-type: none"> <li>• Economic policy and legal framework (e.g. the VOC - Dutch East India Company, British occupation policy, etc. regarding interest rates, imports and exports, prices of goods, etc.)</li> <li>• Structure of the Economy (e.g. land and cattle, mining, industrialisation; need for labour or skills, slavery)</li> <li>• Demographic changes (e.g. population growth, urbanisation, migration, age distribution)</li> <li>• Volatility of market forces (e.g. impact on imports and exports, depressions and recessions)</li> <li>• Economic skills (e.g. educational opportunities, training and craftsmanship)</li> <li>• The role of geography and commercial centres (opportunities)</li> <li>• Labour and labour relations (like working conditions, strikes, e.g. 1922, Indian and Chinese workers)</li> </ul>
<p><b>Step 3:</b>  <b>Analyse the possible impact of political events in the economy in general, but also on an individual in particular</b></p>	<ul style="list-style-type: none"> <li>• <b>Local wars</b> <ul style="list-style-type: none"> <li>✓ Eastern Cape Frontier Wars</li> <li>✓ The Transvaal Civil War</li> <li>✓ The two Anglo-Boer Wars</li> <li>✓ The World Wars</li> <li>✓ The Border War</li> <li>✓ The Korean War</li> </ul> </li> </ul>

ECONOMIC FACTORS	EXAMPLES
	<ul style="list-style-type: none"> <li>• <b>Political behaviour</b> <ul style="list-style-type: none"> <li>✓ Ossewa-Brandwag, AWB, ANC</li> <li>✓ Freedom Struggle</li> <li>✓ Broederbond</li> </ul> </li> <li>• <b>Local and foreign government or policy changes</b> <ul style="list-style-type: none"> <li>✓ The Batavian rule at the Cape</li> <li>✓ The British occupation of the Cape</li> <li>✓ The 1948 victory of the NP (National Party)</li> <li>✓ Post-1994 transformation</li> <li>✓ Catastrophic economic policy: Communism, Venezuela, South Africa</li> </ul> </li> </ul>
<b>Step 4:</b> <b>Analyse the possible impact of pests, plagues and disasters on the economic fortunes of states and individuals</b>	<ul style="list-style-type: none"> <li>• <b>Natural disaster:</b> Droughts, floods</li> <li>• <b>Disease: Humans</b> (Smallpox, Measles, Spanish Flu; Malaria).</li> <li>• <b>Pests and Plagues: Plants</b> (<i>Phylloxera</i>, locusts)</li> <li>• <b>Personal disasters:</b> The mere death of a spouse could plunge a person into an economic catastrophe</li> <li>• <b>Pests and Plagues: Animals</b> (Rinderpest - bovine fever, equine disease)</li> </ul>
<b>Step 5:</b> <b>Analyse the possible impact of technological changes and progress on the economic fates of states and individuals</b>	<ul style="list-style-type: none"> <li>• Progress in <b>transportation</b> - e.g. railways and steam ships</li> <li>• Changes in <b>manufacturing techniques</b> - e.g. mass production</li> <li>• Changing sources of <b>energy</b></li> <li>• Improved <b>healthcare</b> (vaccinations, birth control, medicines)</li> <li>• Advances in <b>communication</b></li> <li>• Innovative <b>agricultural techniques</b></li> <li>• Changes in <b>warfare</b></li> <li>• Advances in <b>mining techniques</b></li> </ul>
<b>Step 6:</b> <b>Consider and investigate the possibility that illegal, unethical and foolish behaviour could have had an impact on the economic destiny and/or life choices of a person</b>	<ul style="list-style-type: none"> <li>• <b>Trickery</b> (fraud, bribery and theft)</li> <li>• A total inability to handle <b>money</b> responsibly</li> <li>• The <b>illegal economy</b> (smuggling, black market)</li> <li>• Unexplained economic <b>Fads and Whims:</b> The Ostrich feather 'boom'; rotten milk Cube scheme; pyramid schemes, etc.</li> <li>• <b>Human compassion</b> (raising of children, adoption, scholarships, donations)</li> <li>• <b>Slavery</b> (Ncapayi, A.H. Potgieter, ZAR in the 1860s)</li> </ul>

Some typical questions a genealogist could ask when using the proposed economic framework in order to direct his/her investigation, include the following:

FACTOR	REMARKS / GUIDELINES
<b>BASIC PERSONAL ECONOMIC DATA</b>	<ul style="list-style-type: none"> <li>• What can be deduced from a person's economic ability using sources such as the following: Final estate liquidation account, Death Notices, birth and baptism records, court records, tax records / <i>Opgaafrolle</i> (poll tax), census surveys and accidentally handed-down stories, like "he was the one to inherit the farm, not the elder brother..."</li> </ul> <p>However, remember: All these records are time-constrained. They only reflect a person's basic economic data at a specific time of his/her life. It is thus a good idea to link an era to the data. Also remember that as far as money is concerned, people are not always honest. Therefore regard some information as a basic indication and not as the absolute truth.</p>
<b>MACRO-ECONOMIC DRIVING FORCES</b>	<ul style="list-style-type: none"> <li>• How would the aforementioned driving forces have affected person X in terms of decisions, living conditions, etc.? How does one interpret the liquidation account of person X in light of the macro-economic factors? How do macro-economic factors affect person X's timeline? Put yourself in person X's shoes: what would you have done when confronted by the same factors?</li> </ul>
<b>THE IMPACT OF POLITICS ON THE ECONOMY</b>	<ul style="list-style-type: none"> <li>• Did a war occur during your ancestor's lifetime? Did this war have an economic impact on his/her material well-being? If so, how and to what extent? Has this economic impact possibly led to other decisions on the part of your ancestor? (e.g. to migrate; or to accept a permanent job for the first time as a woman?)</li> <li>• Which political choices did your ancestor exercised? Did these choices he/she made benefited or harmed his/her economic prospects?</li> <li>• Did your ancestor live in a time of extraordinary government and/or policy changes? Did these political changes have an economic impact on his/her material well-being? If so, how and to which extent? Did this economic impact perhaps led to other decisions made by your ancestor? (e.g. to leave the country or to change jobs?)</li> </ul>

FACTOR	REMARKS / GUIDELINES
<b>THE ROLE OF PESTS, PLAGUES AND DISASTERS</b>	<ul style="list-style-type: none"> <li>• How did Person X manage to survive economically during and after droughts, locust infestations, bovine fever, etc.?</li> <li>• To which extent did droughts, locusts, smallpox, bovine fever (runderpest), etc. affect Person X's material well-being?</li> <li>• Is there any indication that Person X's economic position after the drought, disease, etc. had any influence on his/her choices (e.g. to sell the land and take a job as labourer on the mines; or to remarry?)</li> </ul>
<b>TECHNOLOGY</b>	<ul style="list-style-type: none"> <li>• Did Person X live in a time of comprehensive technological changes, e.g. the Industrial Revolution (1760–1830), and the second industrial revolution (1860–1914)? How did these changes affect Person X's material well-being?</li> <li>• Which technological changes did Person X experience in his lifetime? To which extent could he/she manage to adapt to these changes?</li> <li>• Was Person X perhaps himself / herself responsible for some or other technological innovations that influenced the course of his/her life?</li> </ul>
<b>ILLEGAL, UNETHICAL, FOOLISH AND UNEXPLAINED BEHAVIOUR</b>	<ul style="list-style-type: none"> <li>• Did you have an ancestor whose wealth or poverty cannot be explained? Or are there periods when his absence cannot be explained?</li> <li>• Consider in such instances at least the possibility of illegal, unethical, foolish and/or unaccountable economic explanations within this framework.</li> </ul>

## FROM FRAMEWORK TO COMPARATIVE TIMELINES

The economic framework above is most useful whilst compiling a timeline of a person's life. Often an individual's timeline consists of a mixture of various data, with predominance given to biographical details (like his date of birth and baptism, date of marriage, birth of children, starting dates of new jobs, date of death, etc.). However, a genealogist's knowledge and understanding of the person's life can be "painted" in greater detail, and even be better "understood" if the following steps are taken:

1. Step 1: Draw up timelines for at least the following: a) the personal biographical details of the individual; b) economic events in the person's lifetime, as well as economic data pertaining to the individual that were obtained by means of the proposed framework; c) broader political events during the person's lifetime (although not all political developments have an economic impact, these could still have influenced the individual's choices in life – as was the case with the French Huguenots).
2. Step 2: Compare the different timelines of a person's life and determine if the resulting combined image adds depth and colour to the person's life, or if the picture can, at least, point out many pertinent gaps that could require initiating further research.

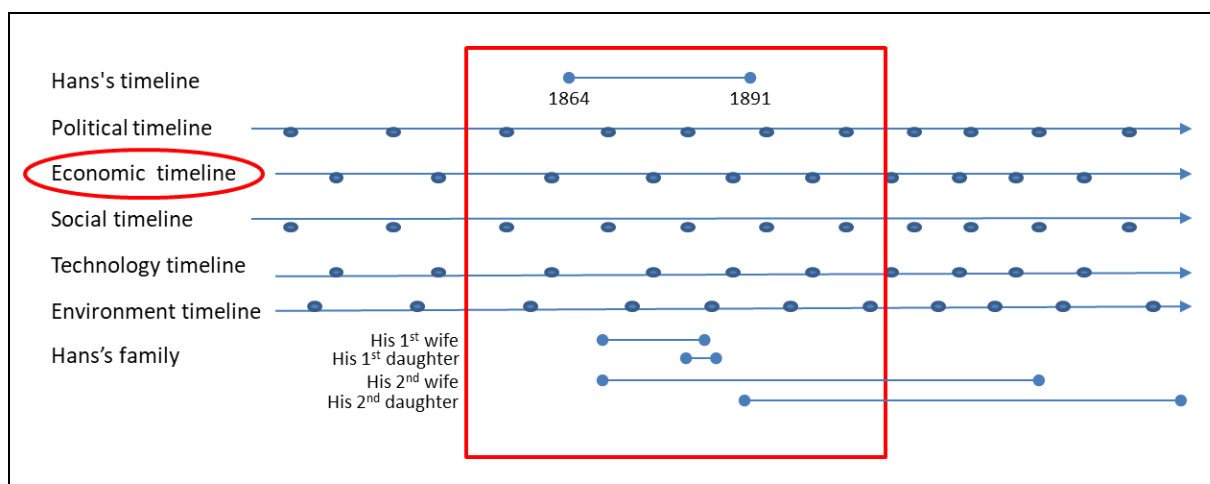


Figure 1: An example of Comparative Timelines in Genealogical Research



In practice, applying the above approach will thus lead to a comparative picture of a person's life – here referred to as "Hans" for the sake of illustration.<sup>1</sup> The illustration above could naturally be made more interesting by a.) adding more biographical points on "Hans's personal timeline" and b.) adding the timelines of Hans's ancestors, his contemporaries, and those of his descendants.

In this way an extremely informative "picture" can be developed over time to show how Hans's life might have been influenced by events in the lives of his ancestors, as well as the extent to which the lives of Hans's descendants were affected by events in his life – as indicated in Figure 1 above, by the inclusion of the timelines of Hans's wives and children.

### **A FINAL EXAMPLE OF COMPARATIVE TIMELINES**

With the proposed framework as a point of departure, it is useful to refer to the impact of the economy in the life of my own ancestor and progenitor, Wilhelm Bernhardt (A1). He was born in 1827 in the town of Camen, in the present-day North-Rhine Westphalia province of Germany. When he was growing up Camen was a part of Prussia. Here Wilhelm probably received a basic school education, because education was readily accessible to members of the Prussian society, especially after the end of the German revolutions of the 1840s. He trained and qualified as a tailor in Camen, probably in accordance with the strict rules of the tailors' guild. The guild's requirements obliged a young man like him to be apprenticed to a master tailor, where he earned a small salary until such time as he could meet the requirements to work as an independent tailor.

By all indications, my ancestor Wilhelm Bernhardt could not make an economically viable life as an apprentice tailor or even as an independent craftsman in such a small town. He possibly could just survive economically but the "good life" would continue to elude him. The reason for this becomes clear on the economic timeline. The German states were, at that stage, in an accelerating industrial revolution, amongst other things in terms of an expanding textile industry with mass production and cheap British imports as a main feature. These circumstances may explain why he joined the British-German Legion as a mercenary in 1855. In contrast to his struggling existence as a tailor in Camen he would be assured of a fixed income in the legion since he, as a mercenary, would fight in the Crimean War for Britain. In addition, the British taxpayer would be responsible for his food and clothing. The British economy was, at that stage – according to the relevant timeline – strong enough to sustain the expenses.

However, the conflict in the Crimea ended before ancestor Wilhelm Bernhardt could be deployed to the front. In terms of their contract the British government had to continue providing the legionnaires' financial benefits. Soon this initial war asset would become a significant economic and social burden on the British (the legion soldiers were stationed in Britain because they were regarded as traitors in Germany). In Britain the German soldiers had to be housed, fed and clothed at the expense of the British taxpayer, without them rendering any service or bringing in any income for Britain. In addition, the soldiers who had no war to fight but still got paid, soon caused various social problems such as drunkenness and street brawls with British soldiers. When Sir George Grey, the Cape

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<sup>1</sup> Naturally every point on the different timelines represents a specific event on the timeline, which has to be described. These descriptions were omitted for a lack of space.

Governor, suggested to the British government (around 1855) to deploy the German soldiers on the turbulent eastern border of the Cape as military settlers, ancestor Wilhelm Bernhardt was one of those who accepted the British offer and was willing to go to Africa in exchange for a small piece of land and a (relatively) good salary.

That is how he finally settled on the Cape's eastern border in 1857. After only three months he deserted – possibly because he found the rough settler life with a diminishing salary and without a wife unsatisfactory. He then found his way into the interior, where he married the daughter of an itinerant stock farmer (*Trekboer*), presumably at Tulbagh or Sutherland. By all accounts, ancestor Wilhelm Bernhardt never was a raging economic success after his marriage. In fact, it seems as though he never had the economic skills to succeed as a tailor in South Africa's interior where the economy was predominantly based on agriculture.

He was seemingly dependent on his father-in-law, Johannes Hendrik Swanepoel, for a while (his timeline clearly overlaps with that of his father-in-law in terms of time and place.) Their ways parted upon his father-in-law's death, and not only did he move his family to another place (from Zeerust to Wakkerstroom), but he also gave up his third son, Jacobus Hercules (A1B3), for adoption at Heidelberg in the Transvaal in 1875. Might this drastic step have been due to his economic status? It is noteworthy that my ancestor's two eldest sons, Wilhelm (A1B1) and Johannes Hendrik (A1B2), were able to write remarkably well. Was his economic circumstance maybe somewhat better when these two brothers were growing up and did it worsen after the birth of his third son?

At the time of his death, supposedly in 1902<sup>2</sup>, the progenitor Wilhelm's economic circumstances were dire and the Death Notice presumably his, dated September 1902 in Grahamstown, shows that he was completely alone, desperately poor and relying on the goodwill of others in the last months of his life.

He died in the "Chronic Sick Hospital", a government institution for poor elderly people with incurable health problems. Were his economic inabilities perhaps caused by the fact that he had been suffering from chronic rheumatism for some years as noted in his Death Notice? Interestingly, the death notice indicates that he never in his life changed his profession after serving as a member of the British-German Legion; the death notice still indicates his career as that of a tailor. Was he unable or did he not want to make adjustments in life?

Clearly, we will never know if economic considerations were the only motivator of his conduct. On the face of it, it seems – in regard to a criminal case against someone in the Wakkerstroom district in the late 1880s, who could possibly have been him, that

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<sup>2</sup> Wilhelm Bernhardt's (A1) supposed Death Notice can be viewed on the FamilySearch website (<https://www.familysearch.org/ark:/61903/3:1:939Z-5H9M-9S?i=478&cc=1779109>). While this document could not yet be conclusively linked to the progenitor Wilhelm Bernhardt, there are strong indications that he was indeed the person whose death it records. Some of the considerations include the following: 1) the estimated age of the person, which broadly corresponds to Wilhelm's confirmed date of birth; 2) the country of origin of the deceased (Germany); 3) the deceased's place of birth (which, although very unclear on the Death Notice nevertheless resembles Camen, where Wilhelm Bernhardt was born according to confirmed information); 4) the occupation of the deceased (tailor), which corresponds to Wilhelm's confirmed occupation; 5) the deceased's religious belief (Roman Catholic), possibly consistent with the progenitor's beliefs (but subject to further confirmation); and the name of the deceased on the Death Notice ("William Bernhardt"), which matches the name he used for the adoption papers for his third son, Jacobus Hercules, in 1875. All these facts suggest that it may well be my ancestor's Death Notice. Unfortunately, however, there are no references to Wilhelm's spouse or children on the Death Notice, which would have provided final confirmation of his identity (under this heading the Death Notice only reads: "Unknown" - to my eternal frustration).

personality traits and psychological factors also could have played a significant role in his life choices. Several reports on the British-German Legion also mention some its members' notoriety for disruptive and inciting behaviour. In addition, the story runs in the family that he pretended to have returned to Germany in the 1890s, allegedly to receive an inheritance, but that his ship was lost at sea on the outbound journey. This explanation sounds too much like an easy way out for a parent to explain a difficult situation to the children. Therefore, it is an almost certain assumption that this story was made up. It would be reasonable to accept that economic factors did play an important and decisive role in many of ancestor's Wilhelm Bernhardt's life choices.

## **IN CONCLUSION**

It is perhaps a misconception that genealogists ask only questions about the past and therefore remain largely focused on things of the past? This misconception should be cleared up. Genealogy is a science that focuses just as much on the present as on the past. By collecting information about our ancestors, genealogists actually get to know the present better, and as a result move closer to answer the ever-elusive genealogical question: "Who am I?" "Why am I?" and "What happened in the past to make me who I am?" The most basic aim – and the joy of genealogical research – lies in searching for and finding answers to questions about our ancestors. From this point of view, the proposed economic framework for genealogical research, as outlined in this article, is hopefully yet another method, along with many others, that could assist genealogists to find still more joy in their chosen field of interest. Its specific contribution will primarily be found in the deeper "economic understanding" of the life of a person or persons, in supporting, enriching and deepening of those persons' basic genealogical data. Obviously, this framework has limitations. For instance, it will be of little or no use for the casual genealogist searching for an adopted child's parents. It does not, however, mean that incidental genealogists will not be able to use it in other contexts. All types of genealogists can, however, connect to and make use of this framework. Let's use the basic knowledge of the economy – in the same way as we can use our knowledge of politics, science, technology, etc. to systematically investigate a person's life and add "colour" to it.

In conclusion: The proposed framework is clearly not complete and perfect – and the last word about its contents has yet to be spoken. An informed economist would probably be able to put a more professional product on the table. Most genealogists are, however, not professional economists and would be satisfied with a basic framework. Perhaps this is exactly where this framework has value; in the empowerment of genealogists to ask more penetrating questions about their ancestors, once they become curious about a case, and in the process get to know more about themselves.

Some genealogical data:

- Wilhelm Bernhardt (A1, \*1827/05/27 Kamen, Kreis Hamm, Regierungsbezirk Arnsberg, Germany, † after 1874, possibly 1902/09/05, Grahamstown) x Dina Susanna Swanepoel.
- Dina Susanna Swanepoel (A1B6C6D10E6, \*1844/09/04, Koue Bokkeveld, † after 1874, x Wilhelm Bernhardt, A1), do Jan Hendrik Swanepoel (A1B6C6D10, \* ca1812, †1877, Marico) and Anna Cecilia Myburgh († after 1856).

- Wilhelm Bernhardt (A1B1, \*1866/10/09 Sutherland, †1939/06/04 Charlestown, x 1890/01/13 Cornelia Adriana Kruger, xx 1920/08/17 Volksrust Anna Dorothea Vorster, born Du Preez)
- Johannes Hendrik Bernhardt (A1B2, \*1870/09/09, †1944/02/10 Fouriesburg x 1896/07/01 Anna Christina Pieterse)
- Jacobus Hercules Bernhardt (A1B3 \*1874/05/19, Heidelberg, ZAR, †1943/11/06, Christiana, x 1896/11/17 Maria Margaretha Magdalena Botha)
- Anna Dorothea du Preez (\*1885/06/13, †1948/12/02 Charlestown, x Johannes Lodewikus Vorster 1906/05/01 Volksrust, xx Wilhelm Bernhardt A1B1 1920/08/17 Volksrust) do Gerhardus Ignatius du Preez and Aletta Cornelia van der Merwe.