

The Matthew Effect Reconsidered: A Social Fluidity Framework for Narrowing the Rich–Poor Divide

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ABSTRACT

Persistent global inequality remains one of the most significant socio-economic challenges of the twenty-first century. While economic growth has lifted millions out of poverty in some regions, the concentration of wealth at the top continues to widen the gap between affluent and marginalized populations. This article advances a philosophical, socio-economic, and theologically informed framework aimed at addressing inequality by restructuring rigid systems of social stratification to enable social fluidity, individual mobility, and upward economic migration.

Rather than advocating coercive wealth redistribution, the study proposes a capacity-centered, opportunity-driven, and morally grounded approach emphasizing education, skills development, institutional access, and faith-inspired agency. Drawing on the Matthew Effect—commonly summarized as “the rich get richer while the poor get poorer”—the article argues that inequality persists not only due to accumulated advantage but also because social strata have become structurally impermeable.

Through qualitative evidence and theoretical synthesis, the study introduces the Social Fluidity and Stratified Mobility Framework (SFSMF), conceptualizing mobility as a function of institutional permeability across five pathways: education, financial resources, social networks, institutional sponsorship, and governance systems.

Empirical insights from Kempton Park (South Africa) and Bulawayo (Zimbabwe) demonstrate how individuals navigate structural constraints. The findings suggest that societies fundamentally desire systems characterized by justice, dignity, and opportunity. When institutions expand access ethically and intentionally, cycles of poverty can be transformed into cycles of empowerment.

Keywords

Global Inequality, Socio-economic Stratification, Wealth Disparity, Social Justice, Economic Mobility.

Introduction

The widening gap between the rich and the poor remains one of the defining challenges of the twenty-first century. Across both developed and developing economies, inequality continues to intensify, raising concerns about social cohesion, political

stability, and institutional legitimacy. Persistent disparities in wealth, income, and opportunity threaten democratic governance and erode public trust. Global inequality data reveal a highly concentrated distribution of wealth. The richest one percent controls a disproportionate share of global assets, while the bottom half of the population holds only a minimal portion [1,2]. This imbalance reflects wealth inequality rather than income inequality, emphasizing structural disparities in asset ownership and long-term economic security.

One of the most influential theoretical explanations for such disparities is the Matthew Effect, popularized by [3]. Rooted in biblical teachings (Matthew 25:29; Luke 19:26; Mark 4:25), the concept describes cumulative advantage, where individuals with initial access to resources continue to accumulate further benefits. Individuals born into privileged environments gain access to quality education, networks, and capital, facilitating upward mobility. Conversely, those born into disadvantaged contexts face structural barriers that limit opportunity, reinforcing cycles of poverty. This article argues that inequality persists not merely because of accumulation but because social strata have become structurally rigid. When institutional pathways are restricted, mobility declines, and inequality becomes entrenched.

To address this, the study introduces the Social Fluidity and Stratified Mobility Framework (SFSMF), emphasizing five mechanisms shaping mobility:

- Education
- Financial resources
- Social networks
- Institutional sponsorship
- Governance systems

These mechanisms are underpinned by a moral and theological imperative for ethical leadership and social responsibility.

Social Fluidity and Strata Permeability

Social fluidity refers to the extent of movement between socioeconomic positions across and within generations. It is measurable through transitions across income, education, or occupational categories. Strata permeability denotes the openness of boundaries between social classes. It reflects the degree to which individuals can enter or exit different strata, influenced by structural conditions such as labor markets and education systems.

Together, these concepts capture measurable mobility rather than metaphorical interpretations. Social fluidity reflects overall movement, while permeability reflects openness at specific boundaries (e.g., working class to middle class).

Structural Openings: Education

Education plays a foundational role in enabling mobility. Credential bottlenecks and school tracking often restrict access to higher strata. Expanding educational attainment—particularly upper-secondary completion—enhances permeability and improves transition rates.

Institutional Channels of Mobility

The SFSMF identifies key institutional channels that determine mobility outcomes:

Resource Convertibility: Finance

Access to financial resources determines the ability to invest in education, entrepreneurship, and mobility. Limited credit access constrains upward movement, particularly for low-income households.

Relational Channels: Networks

Social networks provide access to information, referrals, and opportunities. However, homophilous networks often reinforce inequality by limiting cross-strata interaction.

Recognition Rules: Sponsorship

Gatekeepers—such as employers and institutions—shape mobility through selection and promotion decisions. Biases within these processes may reinforce exclusion.

Rule of Allocation: Governance

Governance systems determine how opportunities are distributed. Transparent and merit-based systems enhance mobility, while corruption and clientelism restrict access.

The Matthew Effect Contextualized

The concept of the Matthew effect is central to understanding structural inequality and the widening gap between the rich and the poor. Rooted in the teachings of Jesus Christ (Matthew 25:29; Luke 19:26; Mark 4:25), the Matthew effect has come to describe a socio-economic dynamic in which advantage begets further advantage, while disadvantage compounds over time. In simple terms, it is captured in the phrase: *“the rich get richer while the poor get poorer”*.

This principle, also referred to as “accumulated advantage”, operates across multiple domains of life including education, employment, and social mobility. While its theological origins speak to spiritual growth and stewardship of gifts, contemporary interpretations have extended its meaning to material inequality and systemic disparity [4]. Thus, the Matthew effect provides a useful analytical lens for examining persistent poverty and inequality in modern societies.

Education Inequality and Structural Advantage: United States vs South Africa

One of the clearest manifestations of the Matthew effect is found in education systems, particularly when comparing funding structures and outcomes in the United States and South Africa.

In the United States, public schools are primarily funded through local property taxes, supplemented by state and federal funding. This system creates structural disparities because schools located in wealthier neighborhoods benefit from higher property values and, consequently, greater financial resources. These schools are able to invest in better infrastructure, attract highly qualified teachers, maintain smaller class sizes, and provide enriched academic and extracurricular programs. Conversely, schools in poorer districts, where property values are lower, receive significantly less funding, thereby limiting opportunities for learners [5].

Importantly, while the United States does have private schools, they are not funded by property taxes but rather through tuition fees, endowments, and private contributions. However, the Matthew effect still applies: affluent families can afford private

education or reside in well-funded public school districts, thereby securing high-quality education for their children. This creates a cycle where privilege is reproduced across generations.

In contrast, South Africa presents a different but equally significant manifestation of educational inequality. Public schools are funded by the state, but are categorized into quintiles based on the socio-economic status of surrounding communities. Historically advantaged (formerly white) schools—many of which are now classified as higher quintiles—continue to benefit from better infrastructure, stronger alumni networks, and additional funding through school fees. Meanwhile, schools in poorer communities (lower quintiles) often struggle with inadequate resources, overcrowded classrooms, and limited access to educational materials.

Private (independent) schools in South Africa, like their American counterparts, are funded primarily through tuition fees. These schools typically offer superior facilities, highly qualified teachers, and enhanced learning environments. As a result, learners from wealthier families are disproportionately represented in high-performing schools, while those from disadvantaged backgrounds remain trapped in under-resourced educational systems.

Thus, in both contexts, although the funding mechanisms differ, the outcome is similar: educational inequality reinforces social inequality, exemplifying the Matthew effect in action.

The **Tiger Woods** Illustration: Opportunity, Networks, and Early Advantage

The early life of Tiger Woods provides a compelling illustration of the Matthew effect in practice. As a young boy, Woods displayed exceptional golfing talent. However, it was not talent alone that propelled him to global success. His father's social connections, access to professional coaching, and exposure to elite training environments played a crucial role in nurturing his abilities.

Professional coaches and sponsors identified his potential early and invested in his development. This created a reinforcing cycle of advantage: better training led to better performance, which attracted more opportunities, ultimately culminating in his entry into elite professional golf.

The critical insight here is that talent without opportunity often remains unrealized. There were likely many other children with comparable or even greater natural ability than Woods, but without access to resources, mentorship, and networks, their potential could not be developed.

Implications for the South African Context

The story of Tiger Woods has profound implications for South Africa. It highlights the importance of early intervention, access to resources, and social capital in shaping life outcomes.

In the South African context, many young people in disadvantaged

communities possess immense potential in academics, sports, and entrepreneurship. However, due to systemic barriers—such as underfunded schools, lack of mentorship, and limited exposure to opportunities—their talents often remain untapped.

If the Matthew effect is left unchecked, these inequalities will continue to reproduce themselves across generations. However, as Briggs [5] suggests, the Matthew effect also has an important “upside”: well-timed and strategic interventions can reverse the cycle, transforming a vicious cycle of disadvantage into a virtuous cycle of opportunity.

The Role of Church Leadership and Social Intervention

This is where church leadership and broader social institutions have a critical role to play. Churches, particularly in Southern Africa, are uniquely positioned within communities and can act as catalysts for change by:

- Providing educational support programs (tutoring, scholarships, mentorship).
- Facilitating partnerships with private sector stakeholders.
- Identifying and nurturing talent in disadvantaged communities.
- Creating platforms for skills development and youth empowerment.

By intentionally investing in human capital, churches can help disrupt the cycle of accumulated disadvantage and promote social mobility through what this study terms Social Fluidity.

Toward an Egalitarian Society

While some historical attempts at forced wealth redistribution (e.g., in the Soviet Union and China) were unsuccessful, the solution does not lie in abandoning the pursuit of equity. Instead, the focus should shift toward equitable access to opportunity, particularly in education and skills development [6].

The Matthew effect does not have to be an irreversible process. With deliberate, collaborative, and sustained interventions, it is possible to narrow the gap between the rich and the poor. This study therefore argues that addressing educational inequality is one of the most effective pathways toward building a just, stable, and prosperous society in Southern Africa.

Research Design and Methodology

This study adopts an exploratory qualitative design aimed at refining the SFMSF. The research is theory-building rather than statistically generalizable [7].

Sampling and Participants

Twenty participants were recruited from Kempton Park and Bulawayo using purposive sampling. Participants included:

- Informal traders
- Professionals
- Clerical workers
- Faith-based leaders

The sample consisted of 18 males and 2 females, aged 30–60.

Methodological Rigor

To enhance methodological rigor, two independent analysts coded 20% of the transcripts, achieving an intercoder agreement exceeding 80%. An audit trail was maintained to document coding decisions, and reflexivity was practiced throughout to minimize researcher bias. These measures strengthen the credibility, dependability, and confirmability of the study.

Data Analysis and Rigor

The study employed inductive thematic coding with constant comparison. Two analysts independently coded 20% of transcripts to develop a structured codebook. Themes were subsequently interpreted through the lens of the SFSMF, enabling examination of how institutional pathways shape mobility outcomes. Intercoder reliability was monitored with a threshold of 80% agreement.

Ethical Considerations

Participants were anonymized using alphanumeric identifiers (e.g., R1A, R2B). Ethical protocols ensured confidentiality and transparency.

Analytical Procedure

The analysis proceeded through six iterative stages. First, all interview transcripts from both phases (n = 20) were transcribed, read, and re-read to ensure deep familiarization with the data. Initial insights were documented through analytic memos. Second, open coding was conducted line-by-line to identify meaningful units related to inequality, mobility, governance, and opportunity, with codes generated inductively rather than imposed a priori. Third, similar codes were grouped into broader conceptual categories, resulting in the development of a structured codebook through constant comparison. Fourth, these categories were refined into candidate themes representing patterned responses across participants. Fifth, themes were reviewed and refined to ensure internal coherence and clear distinction, while disconfirming evidence was actively sought. Finally, the themes were interpreted through the SFSMF lens, linking empirical insights to structural (macro), institutional (meso), and individual (micro) dimensions of mobility.

Overview of Findings

The analysis yielded six interrelated themes reflecting the complex and multi-layered nature of inequality and mobility. Collectively, these themes demonstrate that social stratification is neither fixed nor purely individual but emerges from the interaction between structural conditions, institutional systems, and individual agency.

Thematic Findings and Interpretation

Structural and Systemic Determinants of Inequality

Across both research sites, participants consistently attributed poverty and inequality to systemic and structural factors rather than individual failure. Governance failures, unequal access to opportunities, and infrastructure deficits were frequently

emphasized:

“Opportunities are there, but they are not for everyone. It depends on who you know and where you come from.” (R4)
“Even if you want to work or start something, the environment does not support you.” (R9)

“Resources are available, but they don’t reach the people who need them.” (R12)

Interpretation

These accounts indicate that inequality is structurally embedded within institutional arrangements. Limited access to resources, coupled with governance inefficiencies, creates conditions in which upward mobility is systematically constrained.

Education as a Contested Mobility Pathway

Education was universally recognized as important but not uniformly effective as a pathway to mobility.

“Education opens doors. Without it, you struggle.” (R2)

“You can be educated, but if there are no jobs, it doesn’t help.” (R7)

“Some people succeed without formal education because they use their skills.” (R11)

Interpretation

Education functions as a conditional mobility mechanism. Its effectiveness depends on broader opportunity structures, particularly labor market conditions and institutional accessibility, reinforcing the SFSMF emphasis on context.

Mechanisms of Social Fluidity and Upward Mobility

Participants identified multiple pathways for achieving upward mobility, including entrepreneurship, skills development, access to capital, and mentorship.

“People who succeed are those who create their own opportunities.” (R5)

“If you have someone guiding you, it becomes easier to move forward.” (S2)

Interpretation

Mobility is multi-dimensional, requiring both individual initiative and institutional support. This aligns with the SFSMF conception of dynamic and context-dependent mobility pathways.

Governance, Leadership, and Moral Economy

Leadership quality was widely perceived as a decisive factor shaping socio-economic outcomes. Corruption and nepotism emerged as persistent barriers:

“Leadership determines whether people succeed or remain poor.” (R8)

“Jobs are not given based on merit.” (S3)

“It is not just about money—it is about fairness.” (R10)

Interpretation

Governance functions as a gate-keeping mechanism that regulates access to opportunity. The framing of inequality as a moral issue underscores the importance of ethical leadership in fostering equitable systems.

Individual Agency versus Structural Constraint

Participants articulated a nuanced relationship between personal responsibility and systemic limitation:

“You must work hard, but hard work alone is not enough.” (R6)
“Some people try, but the system does not allow them to progress.” (S4)

Interpretation

Mobility outcomes arise from the interaction between agency and structure. Individual effort operates within systemic constraints, reinforcing a relational understanding of inequality.

Faith, Ethics, and Communal Responsibility

Faith-based institutions and communal networks were identified as important sources of support, particularly where state systems are perceived to be insufficient:

“The church helps people when the government fails.” (R3)
“We must help each other; no one succeeds alone.” (S1)

Interpretation

Faith institutions play a critical meso-level role by promoting social cohesion, ethical values, and informal welfare support, thereby mitigating some effects of structural inequality.

Saturation and Validation (Phase 2)

The second phase of data collection ($n = 5$) confirmed all six themes. No new themes emerged, and existing interpretations remained consistent.

Conclusion on Saturation

The data reached theoretical saturation, strengthening the validity and robustness of the findings.

Integrated Thematic Interpretation

The findings collectively demonstrate that inequality persists through the interaction of structural barriers, institutional limitations, and unequal access to opportunity. However, mobility remains possible when systems are inclusive, institutions are accessible, and individuals are empowered to act.

Link to the Social Fluidity and Stratified Mobility Framework (SFSMF)

The findings align strongly with the SFSMF:

- **Macro-level:** Structural inequality constrains mobility.
- **Meso-level:** Institutions mediate access to opportunity.
- **Micro-level:** Individuals navigate and respond to constraints.

Concluding Findings Statement

The study finds that social stratification is not fixed but becomes fluid when structural reform, institutional access, and individual agency interact dynamically. The confirmation of themes across both phases, with no emergence of new patterns, affirms the robustness and coherence of this conclusion.

Literature Positioning

Recent Studies-(2021–2025)

Recent work treats social mobility as **power-inflected** and institutionally gated. [8]. show how transnational mobility intersects ethnicity, class, and citizenship, reproducing stratification at structural/institutional levels—not just individual movement.

Social-capital network studies (e.g., minibus taxi industry analyses) demonstrate how bonding/bridging/linking ties enable access **but also exclude** and stabilize hierarchies, making network effects conditional on governance [9].

Capability-approach updates [10] emphasize **freedoms/opportunities**

while noting that operationalization remains uneven where structural barriers dominate.

Differentiation of SFSMF

The SFSMF advances existing frameworks by:

- Emphasizing institutional channels over abstract capabilities.
- Integrating networks as one of multiple mobility mechanisms.
- Providing a process-based explanation of stratification dynamics.

Faith-Based Institutions and Social Fluidity in Africa

Across the African continent, faith-based institutions—particularly the Christian church—have historically functioned as critical actors in community transformation, often filling institutional gaps left by weak or underperforming state systems. Within the Social Fluidity and Stratified Mobility Framework (SFSMF), the church can be understood not merely as a spiritual entity but as an institutional agent that actively shapes multiple mobility pathways, including education, social networks, and governance.

In [11] observe that church leadership has increasingly positioned itself as both a corrective and complementary force to political institutions, particularly in advancing sustainable development. This suggests that ecclesiastical leadership contributes to institutional sponsorship and governance pathways, enabling communities to access opportunities that might otherwise remain inaccessible.

Similarly, in Kenya, the church historically functioned as a prophetic voice during periods of political repression, particularly between 1986 and 1992, when it advocated for marginalized

populations under restrictive political conditions [12]. In this context, the church played a critical role in reinforcing moral agency and governance accountability, thereby expanding the social space within which mobility could occur.

In Angola, where prolonged civil conflict and economic instability weakened state capacity, churches have demonstrated institutional resilience by providing essential services such as education and healthcare [13]. These interventions directly contribute to capacity-centered empowerment, one of the central pillars of the SFSMF.

However, limitations in skilled human capital highlight the importance of strengthening institutional capacity to maximize developmental impact.

Collectively, these examples illustrate that the church operates as a hybrid institution—simultaneously spiritual, social, and developmental—capable of influencing multiple dimensions of social mobility. By providing education, fostering social networks, advocating ethical governance, and supporting vulnerable populations, faith-based institutions contribute to enhancing strata permeability within structurally constrained environments.

In the South African context, where inequality remains among the highest globally, the church is uniquely positioned to influence social transformation. With a significant proportion of the population identifying as Christian [14], churches possess extensive grassroots reach and moral authority. This positions them as key actors in promoting ethical leadership, challenging corruption, and facilitating community-based empowerment initiatives.

Importantly, the role of the church extends beyond charitable interventions. Within the SFSMF framework, faith-based institutions can actively contribute to the restructuring of opportunity systems by:

- Expanding access to education and skills development,
- Strengthening social capital and mentorship networks,
- Supporting entrepreneurial initiatives,
- Advocating for transparent and accountable governance systems.

Thus, faith-based institutions are not peripheral to the dynamics of social mobility; rather, they constitute integral components of the institutional ecosystem that shapes opportunity distribution. When effectively mobilized, the church can transform vicious cycles of cumulative disadvantage into virtuous cycles of empowerment and upward mobility.

Therefore, the church operates as a hybrid institution, influencing both moral and structural dimensions of mobility.

Limitations

Limitations and boundary conditions:* The SFSMF assumes some permeability in education, finance, networks, sponsorship, and governance channels. This may not hold where **institutional constraints (weak credential recognition, underdeveloped credit

markets) or **political economy barriers** (clientelism, regulatory capture) harden stratum boundaries. Merit-based filters can inadvertently reproduce exclusion if assessments rely on opaque referrals or culturally loaded criteria. The framework also foregrounds individual-channel mobility more than class-wide structural shifts. We will address these conditions by (a) testing SFSMF in cases with varying institutional quality, (b) adding explicit gate-keeper-accountability indicators, and (c) clarifying the scope: analytic transfer to urban mixed-formal contexts, with reduced portability to highly captured or conflict-affected regimes unless supplemented by measures of state capacity and patronage.

Conclusion

The Matthew Effect should not be accepted as an immutable law of social organization. While cumulative advantage shapes outcomes, institutional design can either reinforce or mitigate inequality.

The SFSMF offers a pathway for narrowing the rich–poor divide by expanding access to opportunity while preserving merit-based advancement. Central to this framework is a moral imperative grounded in ethical leadership and faith-based responsibility.

By strengthening education, expanding financial inclusion, promoting ethical governance, and fostering social networks, societies can transform rigid stratification into dynamic mobility systems.

Ultimately, societies flourish when institutions promote dignity, opportunity, and justice for all.

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