

Catholic Social Teaching under John Paul II and Benedict XVI

Receiving Vatican II in Challenging Times¹

The roughly quarter of a century covered by the pontificates of John Paul II and Benedict XVI bears two important characteristics for the development of Catholic Social Teaching. First, it is marked by the continuing reception of Vatican II with its amount of enthusiasm, resistances, tensions, and variety of interpretations. Second, it is embedded in the general movement of globalization of the world at the economic level but also at the cultural and political ones, with, as well, positive and negative aspects. Nonetheless, what will be stressed tirelessly by the two popes is the theological nature of the social teaching of the Church: what is at stake in these encyclicals, discourses, or messages is always the proclamation of the Gospel for the salvation of human beings. The quick (and incomplete) journey that we are going to do through the major documents produced by the two popes during their pontificates will give testimony to this fundamental mission of the Church.

1 John Paul II – 1978-2005

1.1 3 major social encyclicals... and more!

John Paul II's contribution to Catholic Social Teaching is huge. Continuing on a similar pace as in the 60s and 70s when John XXIII, Paul VI, and the Synod of Bishops issued no less than 6 major documents,² John Paul II published 3 social encyclicals in the first decade of his pontificate. In 1981 *Laborem exercens* (LE) commemorates the 90th anniversary of *Rerum novarum* and offers a thorough reflection on the question of work. In late 1987, *Sollicitudo rei socialis* (SRS) updates *Populorum progressio*'s teaching about development, twenty years after Paul VI's landmark encyclical. 1991 marks the hundredth anniversary of *Rerum novarum* with the publication of *Centesimus annus* (CA) which offers crucial insights from the perspective of the transformation of the world that occurred with the fall of communism in Eastern Europe in 1989.

¹ Unless specifically mentioned all magisterial documents are available on the Vatican website:
www.vatican.va

² John XXIII : *Mater et magistra* (1961), *Pacem in terris* (1963) ; Paul VI : *Populorum progressio* (1967), *Octogesima adveniens* (1971), *Evangelii nuntiandi* (1975) ; Synod of Bishops : *Justitia in mundo* (1971).

In what follows, these three social encyclicals will be our major objects of interest but we should recall that they do not exhaust the social teaching of Pope John Paul II. In his first and programmatic encyclical, *Redemptoris hominis* (1979), the Polish pope sets the tone of his pontificate. He deals with a large range of topics unified in a Christological and humanistic approach. Two phrases sum up perhaps best this unifying vision: “In Christ and through Christ, human persons have acquired full awareness of their dignity” (*RH* 11; cf *RH* 10) and “all routes for the Church are directed toward the human person” (*RH* 14 title). The mystery of Christ is the center of the mission of the Church but this leads immediately to the human person. No dualism in John Paul II’s thought between the spiritual and the temporal. His integral humanism “embraces all dimensions of life, including the economic, the political, the cultural, and the religious.”³ Therefore, in this first encyclical the pope has strong words to denounce a modern “so-called development” that is not solving the problems of starvation and poverty or the plague of unemployment and depletes earth’s resources (*RH* 15-16). He also writes about human rights that he sees as the real test of whether justice is present (*RH* 17). One can say that in coherence with this first programmatic encyclical, the main characteristic of John Paul II’s social teaching is personalism. He is not trying to expound a systematic social order like Pius XI attempted in *Quadregesimo anno*, but rather he offers an anthropology, a vision of the human being, as the basis for discernment on social, economic and political issues. The human being is a person, which means that her social dimension is *essential*. It is not an added feature to a self-sufficient individual subject. Personalism is for John Paul II the concretization of a truly Christian anthropology rooted in Jesus Christ, the incarnated God and accomplishment of the human vocation.

His many travels around the world were also crucial opportunities for teaching about social issues. In many countries plagued by dictatorial governments he pleaded unceasingly for human rights (for example in Central America 1983, in Brazil in 1980, in the Philippines in 1981, in Poland in 1979, 1983, 1987). He spoke also about workers’ rights, for the defense of indigenous people (in Latin America, in Canada, in Australia...), against the death penalty (USA), etc.

Obviously in the second half of the pontificate, the pope is less vocal on specifically social issues. No major document of the type of a social encyclical is issued after 1991. Nonetheless, in 2004, the Pontifical Council for Justice and Peace published the *Compendium of the Social Doctrine of the Church*, which gathers and organizes systematically key elements of the social doctrine. It should also be noted the importance of the messages issued annually by the Pope for specific occasions: World Day of Peace (1st of January), World Day of Migrants and Refugees, World Communications Day. For example, the 1990’s Message for the World Day of Peace, *Peace with God*

³ Donal Dorr, *Option for the Poor and for the Earth*, 3rd edition (Maryknoll, New York: Orbis, 2012), 248.

the Creation, Peace with All of Creation, is a landmark in the teaching of the Church about ecology. To be noted as well, some encyclicals that are not dedicated entirely to a so-called “social issue” may contain substantial social teaching. For example, *Evangelium vitae* (1995), which deals with beginning- and end-of-life issues has important reflections about democracy, religious freedom, and relations between Church and State.

1.2 World and Church Contexts

Catholic Social Teaching is always a theological and ethical reflection *in context*. To capture the context out of which emerged Pope John Paul II’s social teaching, let’s recall briefly the situation of the world in the 80s, the conflicting emergence of liberation theology in Latin America, and the personality of the pope.

1.2.1 Situation of the World in the Eighties

At the economic level, the world in the 80s had definitely moved out of the 30 years of post-war boom. And overall, it is far less difficult to be optimistic about human progress toward a more just world (with less poverty, more respect for human rights, more peace) than twenty years before, at the time of large decolonization processes. In 1987, *SRS* began with a stark statement: “the hopes for development, at the time [of PP] so lively, today appear very far from being realized” (*SRS* 12). Indeed, despite a few signs of progress for some countries in Asia such as South Korea, Taiwan or Singapore, the overall situation was rather bleak. Poverty, wars, disorganization and corruption in state structures, lack of proper healthcare and education, exploding international debt, denial of human rights: the list of the plagues affecting “Third World” countries seemed not to have receded much. The gaps between developed countries and developing countries and between rich and poor inside any one country were still increasing. The world was also marked by the crisis provoked by the two oil shocks of the 70s. The so-called “developed countries” of the North had to deal with repeated economic crisis with rising levels of unemployment. Segments of the world’s population remained in dire poverty. This reality had begun to be referred to as the “Fourth World”.

In the 80s what *SRS* called the “logic of blocks” is also still very much at work. The two super-powers of West and East (USA and USSR) are not directly at war against each other but fight at a distance, for example in Central America, in Angola or in the Philippines. The competition between two ideologies (liberal capitalism and collectivist communism) is very much in the background of some discussions in the encyclicals, like the conflict between capital and labor in *LE*. In line with his predecessors, John Paul II affirms that Catholic Social Teaching does not promote a unique solution in terms of political, social and economic organization of the society, it is not a “third way between liberal capitalism and Marxist collectivism” (*SRS* 41). After the fall of communism in Eastern Europe

in 1989 and what seems to be the victory of Western capitalism which became overwhelmingly hegemonic, the pope will face the latent question: is capitalism really the solution for the good of humanity? CA will respond with a good deal of critique of unbridled liberal capitalism.

1.2.2 The Church

Looking at the church, the reception of the Council was still on its way with some turbulences. In 1985, an extraordinary synod of the bishops celebrated the 20th anniversary of the end of the Council and attempted to clarify its interpretation. The stress was put on not separating the spirit that emerged from the event and the letter of the documents produced. While endorsing entirely the Council and reaffirming its centrality for the life of the Church, against those gathered around Archbishop Lefebvre who rejected it and would slowly separate themselves from the regular Catholic Church, Pope John Paul also reaffirmed a more vertical mode of authority by the Roman Magisterium as a needed means for unity. This could explain the importance he put at times to promote Catholic Social Teaching as “the social doctrine of the Church”.

A key element of context for Catholic Social Teaching is the emergence of liberation theology in Latin America. Following on the council’s invitation to discern the signs of the times in order to proclaim Christ’s message of salvation, the Latin American Bishops gathered in Medellín in 1968. They recognized that the poor and poverty were the foundational experience lived in their continent. The church ought to testify to the love of God by loving the poor, becoming sisters and brothers with and among them, and being committed to work for their cause. So the best way to express the Christian doctrine of salvation for the suffering peoples of Latin America became the notion of liberation.

In 1971, Peruvian theologian Gustavo Gutiérrez published *A Theology of Liberation*, opening the way for a large variety of theological publications ranging from biblical exegesis and systematics to ethics and spirituality, all of which readdressed traditional questions and took up new ones always from the perspective of the poor in Latin America. In Latin America, in contrast to Europe, the mission of theology in the aftermath of Vatican II was not to respond to the challenge of the nonbeliever but rather the challenge of how to proclaim God as Father in a context of dehumanization and injustice. Liberation theology challenged the unjust structures of the South American societies but also some of the traditional positions of a church that had been, historically, close to the wealthy elites. It also put the theologians in proximity with various revolutionary movements and Marxist currents of thought. Inside the Latin American church and also in the Vatican, opposition to liberation theology grew at the same time that it flourished.

At Puebla in 1979, the bishops confirmed the orientation taken at Medellín and affirmed the centrality of “the option for the poor” even though during the preparation of the conference attempts to shift away from this line were strong. Significantly, in his opening speech Pope John Paul II issued warnings but also clearly endorsed the central concern for social justice and the poor and highlighted the reality of human dignity “crushed under foot” in so many Latin American countries.

The years following Puebla saw growing tensions between the Congregation for the Doctrine of the Faith (CDF) and Latin American liberation theologians. Two instructions were issued by the former in 1984 and 1986, the first very negative and the second more positive. Some theologians such as Leonardo Boff had to leave their teaching positions. The tension was also fueled by the nomination of a new generation of bishops unsympathetic to liberation theology. However, Pope John Paul II declared in a letter to the Brazilian bishops in 1986, that liberation theology was “not only timely but useful and necessary.”

1.2.3 A Pope from Eastern Europe

The election of John Paul II to the papacy in 1978 marked a significant new step in the development of a world church. He himself recognized at the balcony of Saint Peter’s Basilica, that the cardinals had “called him from a far country.” The Polish Pope brought with him a different perspective on the church and the world. This also colored his social encyclicals.

Both during the German occupation and then under the communist regime, Catholic faith and the Catholic church of Poland were crucial places of resistance and of defense of the Polish identity. In such a context, unity and visible fidelity to the institution were primordial. This is a very different situation for the articulation of church-state relations from Western Europe where growing secularization meant that the church had to struggle to remain relevant in the public sphere. Far different too were the military dictatorships of Latin America where those exercising oppressive powers were very often still church goers causing a political divide across the church.

Paul VI had initiated papal travels outside Italy but in comparison to John Paul II he seems not to have seen very much of the world. John Paul visited all the continents and most of them several times. Undoubtedly such experiences informed and shaped part of his teaching. As already noted, some of the speeches he gave during his travels and the symbolic encounters with many people representing the poor, the powerless, the excluded of our societies are key elements of this teaching.

Nonetheless, it is certainly his Polish roots that most influence him in his social encyclicals. As Donal Dorr noticed, in 1989 and early 1990, two images impacted the whole world: the dismantlement of the Berlin wall and Nelson Mandela walking out free from his prison. Two years

later CA gives a remarkable analysis of the state of the world and the challenges to be faced in the light of what happened in Eastern Europe.⁴ If the pope had been African and had taken the events in South Africa as the frame, the result would have been entirely different. As a Pole, Pope John Paul II followed very closely the evolution of his homeland and took an active part in the process which would lead to democracy in 1989. At the heart of the Polish opposition movement was the trade union *Solidarność* (Solidarity) whose name both identifies a program and resonates with a central theme of John Paul II's social teaching.

1.3 Theological Orientations

Catholic Social Teaching is theological. Already, since Vatican II, key documents of the teaching had testified of its theological nature in a stronger way than the first social encyclicals of Leo XIII, Pius XI or Pius XII which were sometimes referred to as mere social philosophy with natural law as their methodology. Biblical and theological arguments are more often and better used after the Council. In 1971, the Bishops claimed that "Action on behalf of justice and participation in the transformation of the world fully appear to us as a constitutive dimension of the preaching of the Gospel"⁵. What concerns the work for social justice and the common good is essential or constitutive of the Christian faith and the preaching of the Gospel clearly situates Catholic Social Teaching in the field of *theo*-logy: speaking of God.

Catholic Social Teaching under John Paul II (and also Benedict XVI) insists even more on this theological dimension making it particularly explicit in the style of the documents which have large parts of reflections based directly on biblical texts (for example Genesis 1-3 in *LE*, the Pauline epistles in *SRS*, etc.). The pope claims that "the Church's social doctrine... belongs to the field, not of ideology, but of theology and particularly of moral theology" (*SRS* 41). "The teaching and spreading of her social doctrine are part of the Church's evangelizing mission" (*Ibid*). Later in *CA*, he adds: "The 'new evangelization', which the modern world urgently needs and which I have emphasized many times, must include *among its essential elements* a proclamation of the Church's social doctrine" (*CA* 5, my emphasis).

Karl Rahner speaks of theology as the "science of mystery". He thus highlights that trying to enter more deeply into an understanding of God's saving love we never exhaust the mystery. There are many ways to grasp something of this mystery and various theological visions are legitimate as far as they help in this endeavor. In John Paul II's social teaching various theological frameworks are at work and sometimes in tension. Overall, it enriches our understanding of the mystery of God's saving love.

⁴ Dorr, *Option for the Poor*, 307.

⁵ Synod of Bishops, *Iustitia in mundo*, 6. www.osjspm.org/document.doc?id=69.

A first framework is the inheritance of Vatican II. The incarnated God is at work in history and discerning the signs of the times is the task of the Church in order to proclaim the Gospel. The path opened by *Gaudium et spes* toward an inductive and dialogical method is taken up in the Catholic Social Teaching documents that follow. The see-judge-act approach of Catholic Action becomes the favored means of reflection for the Church on social issues. It is still very present in John Paul II's encyclicals that always dedicate large parts to analysis of the current state of the world in their beginning. Not so much explicit in the footnotes, a careful reading can nonetheless detect a certain dimension of dialog with philosophy and social sciences.

However, in John Paul II's Catholic Social Teaching, one finds also at work another theological framework which puts a stronger stress on the vertical dimension of the relation between God and human beings with a more pessimistic view on the world marred by sin. There is the need to reaffirm, with sometimes a more deductive approach (from theological principles to their consequences on moral and ethical issues), the truth of the faith of which the Church is the guardian. The stress put by John Paul II on the role to be played by the Roman magisterium goes in that direction.

Finally, John Paul II's teaching also incorporated, with sometimes some critical nuances, concepts and notions elaborated in the context of Latin America and liberation theology. Hence "the structures of sin" or the "preferential option or love for the poor" in *SRS*. This reflects the influence of a third theological framework more attentive to the collective dimension of faith and salvation. Sin is not only personal but "social". Salvation can be understood as liberation from sin in the concrete sense of freedom from all kinds of oppression including social and collective.

Social encyclicals under the pontificate of John Paul II are a striking example of the theological depth that Catholic Social Teaching is gradually taking but also, and despite the tendency to homogenization at work in the Roman Curia, of a certain richness of theological approaches.

1.4 A few important insights

1.4.1 Work

Laborem exercens, the first social encyclical of John Paul II, commemorating the 90th anniversary of *Rerum Novarum* in 1981, offers a remarkable reflection on human labor. Here are some key elements

LE gives a positive approach to work. Work, including but not limited to manual work, is not merely the consequence of sin. It is a good for the human being. Human dignity is at stake in work because "created in the image of God, [the human person] shares by his work in the activity of the Creator" (*LE* 25). Work "humanizes" human beings: "through work man not only transforms nature,

adapting it to his own needs, but he also achieves fulfilment as a human being and indeed, in a sense, becomes 'more a human being'" (LE 9).

The personalist approach of John Paul II is visible in the distinction he makes between the subjective and objective sense of work. In the objective sense, work refers to the transformation of objects, the production of something. In the subjective sense, it refers to the activity of she or he who works and the transformation operated in her/him. For Catholic Social Teaching, this subjective sense should always have the primacy when considering ethical or practical issues:

This [subjective] dimension conditions the very ethical nature of work. In fact there is no doubt that human work has an ethical value of its own, which clearly and directly remains linked to the fact that the one who carries it out is a person, a conscious and free subject, that is to say a subject that decides about himself. This truth, which in a sense constitutes the fundamental and perennial heart of Christian teaching on human work, has had and continues to have primary significance for the formulation of the important social problems characterizing whole ages (LE 6).

As a consequence of this primacy, LE affirms the primacy of work over capital. This means also that the ownership of the means of production should always be directed to the good of the all the persons implicated, especially the workers:

[Means of production] cannot be possessed against labor, they cannot even be possessed for possession's sake, because the only legitimate title to their possession- whether in the form of private ownership or in the form of public or collective ownership-is that they should serve labor, and thus, by serving labor, that they should make possible the achievement of the first principle of this order, namely, the universal destination of goods and the right to common use of them (LE 14).

The anthropological vision on work is also the basis for the defense of the rights of workers. LE expounds at length about those rights: right to a just remuneration (including social benefits), right to unionize, right to migrate, rights of disabled persons, rights of women. LE also insists on the necessity to provide work for everyone (something like a "right to work") in the context of high rates of unemployment in many countries.

To capture the responsibilities concerning the issue of work, LE introduces the notion of the indirect employer.

The concept of *indirect employer* includes both persons and institutions of various kinds, and also collective labor contracts and the principles of conduct which are laid down by these persons and institutions and which determine the whole socioeconomic system or are its result. [...] the indirect employer substantially determines one or other facet of the labor relationship, thus conditioning the conduct of the direct employer when the latter determines in concrete terms the actual work contract and labor relations. This is not to absolve the direct employer from his own responsibility, but only to draw attention to the whole network of influences that condition his conduct (LE 17).

The notion of indirect employer thus refers to the State, the unions, but also international organizations and could also include the consumer. Although remaining rather vague, it is an interesting tool to capture the structural dimension at work in the question of work. Justice in the ambit of work is not simply a matter of a just contract between the employer and the employee. Many other relations and institutions impact this interpersonal contract.

1.4.2 Structures of sin

In *SRS*, John Paul II introduces the concept of “structures of sin” in order to capture theologically the structural dimension of social injustice present in the world. Why had integral development improved so little since *PP* in the 60s? Individual comportments, especially among economic and political leaders are at stake. In religious language, one has to speak of sin. But it is not merely a personal question there is also a social structural dimension to sin:

one must denounce the existence of economic, financial and social mechanisms which, although they are manipulated by people, often function almost automatically, thus accentuating the situation of wealth for some and poverty for the rest. These mechanisms, which are maneuvered directly or indirectly by the more developed countries, by their very functioning favor the interests of the people manipulating them and in the end they suffocate or condition the economies of the less developed countries (*SRS* 16).

This is why, following (and nuancing!) some of the reflections from Latin America, John Paul II speaks of “structures of sin”:

The sum total of the negative factors working against a true awareness of the universal common good, and the need to further it, gives the impression of creating, in persons and institutions, an obstacle which is difficult to overcome. If the present situation can be attributed to difficulties of various kinds, it is not out of place to speak of “structures of sin,” which... are rooted in personal sin, and thus always linked to the concrete acts of individuals who introduce these structures, consolidate them and make them difficult to remove. And thus they grow stronger, spread, and become the source of other sins, and so influence people's behavior (*SRS* 36).

Today we can think of some aspects of the economic and financial system, or of institutional institutions continuing racial discrimination as structures of sin. Probably the economic and social organization of our societies, obsessed by economic growth causing irreversible damages to the environment can also be read through the lens of a “structure of sin.” Of course at the root of a structure of sin there are always personal sins that contributed to its establishment. But when the structure already works “almost automatically”, the personal sins are present in reinforcing them, making them difficult to abolish or covering them up. *SRS* points out:

it must be said that just as one may sin through selfishness and the desire for excessive profit and power, one may also be found wanting with regard to the urgent needs of multitudes of human beings submerged in conditions of underdevelopment, through fear, indecision and, basically, through cowardice (*SRS* 47)

1.4.3 Solidarity

In John Paul II's social teaching, the principle of solidarity plays a central role. Solidarity "is not a feeling of vague compassion or shallow distress at the misfortunes of so many people, both near and far. On the contrary, it is a firm and persevering determination to commit oneself to the common good; that is to say to the good of all and of each individual, because we are all really responsible for all" (SRS 38). For the pope it is the sure path to overcome the structures of sin. It is a Christian virtue and the pope connects it to charity "which is the distinguishing mark of Christ's discipleship" (SRS 40), and even to the mystery of Trinity, "supreme model of unity" "which must ultimately inspire our *solidarity*" (SRS 40). Solidarity is not directly a biblical concept but John Paul II adopted it as adequately reflecting in the current world, the biblical calls for "fraternity" or "communion".

SRS calls for the exercise of solidarity within society through the recognition of all members as persons entitled to rights and not "just some kind of instrument, with work capacity and physical strength to be exploited at low cost and then discarded when no longer useful" (SRS 39). Solidarity implies that the more powerful or influential, those who have a greater share of goods, should feel responsible for the weaker but also that the latter "should not adopt a purely passive attitude" (Ibid.). The idea that people should be the first actors of their own development but not abandoned to themselves is at the heart of the exercise of solidarity. The same is applicable at the level of international relationships where "every type of imperialism" or "determination to preserve [one's] hegemony" needs to be surmounted and on the contrary "a real international system may be established which will rest on the foundation of the equality of all peoples and the necessary respect for their legitimate differences" (Ibid.). This is particularly at stake in applying the principle of the universal destination of the goods of creation. Solidarity then is "the path to peace and at the same time to development" (Ibid.). Peace will be achieved "through the putting into effect of social and international justice, but also through the practices of the virtues which favor togetherness, and which teach us to live in unity" (Ibid.). The transformation of interdependence into solidarity calls for fostering collaboration and abandoning "the politics of blocks" and of "all forms of economic, military, or political imperialism" (Ibid.).

LE insists on the worker's solidarity in order to bring about profound changes in the ambit of work. In a certain sense, solidarity is the alternative that John Paul II offers to the class struggle promoted by Marxism. Solidarity does not ignore the dimension of confrontation or opposition to unjust systems but it does not have the negative connotations of the word "struggle". There is a unifying dynamism in the reaction to an unjust an exploitive system and in the building up of the common good (LE 8). There is a strong link between this notion of solidarity and that of

participation. The workers should not feel themselves “a cog in a huge machine from above” but rather participating and working for themselves (*LE 15*).⁶

The principle of solidarity is again very much mentioned in *CA* in which, for example it is associated with the principle of subsidiarity in order to shape the role of the State regarding work challenges in an updated reading of *RR*:

The State must contribute to the achievement of these goals both directly and indirectly. Indirectly and according to the principle of subsidiarity, by creating favorable conditions for the free exercise of economic activity, which will lead to abundant opportunities for employment and sources of wealth. Directly and according to the principle of solidarity, by defending the weakest, by placing certain limits on the autonomy of the parties who determine working conditions, and by ensuring in every case the necessary minimum support for the unemployed worker (*CA 15*).

1.4.4 Capitalism

After the fall of Communism at the end of the 80s, it seemed to some that capitalism remained the only possible path for the socio-economic development of countries. John Paul II addressed explicitly this issue in *CA* and indeed, in line with his predecessors who had always some criticisms to raise against liberal capitalism, he does not endorse this conclusion:

can it perhaps be said that, after the failure of Communism, capitalism is the victorious social system, and that capitalism should be the goal of the countries now making efforts to rebuild their economy and society? Is this the model which ought to be proposed to the countries of the Third World which are searching for the path to true economic and civil progress? The answer is obviously complex (*CA 42*).

And the pope goes on explaining:

If by "capitalism" is meant an economic system which recognizes the fundamental and positive role of business, the market, private property and the resulting responsibility for the means of production, as well as free human creativity in the economic sector, then the answer is certainly in the affirmative, even though it would perhaps be more appropriate to speak of a "business economy", "market economy" or simply "free economy". But if by "capitalism" is meant a system in which freedom in the economic sector is not circumscribed within a strong juridical framework which places it at the service of human freedom in its totality, and which sees it as a particular aspect of that freedom, the core of which is ethical and religious, then the reply is certainly negative (*CA 42*).

It is obvious that the type of neo-liberalism (or “neo-conservatism” in US language) that has spread all over the world in the last decades, promoting absolute power to the markets to allocate resources, shrinking of the State, and deregulation, has not the favor of Catholic Social Teaching.

⁶ Dorr, *Option for the Poor*, 272-278.

It is nonetheless true that CA had also some strong criticism against some forms of welfare State which is sometimes dubbed “the Social Assistance State” (CA 48). CA suggests that various categories of person in need would be helped more effectively not by the State but by people closer to them (CA 48). What appears as a strong attack on the Western model of State welfare should nonetheless probably be interpreted in a more positive way. It is not a call to simply give up with the welfare State and come back to a privatized organization of charity as advocated by some. It is rather a call to update and correct the system. According to Curran:

The papal criticism of the social assistance state is based on John Paul II’s emphasis on a participatory community. The State has an important role to play in bringing about such a participatory community, but its assistance should not be in the form of impersonal bureaucracies that foster passive dependence.⁷

Once again, we can see here at work the strong personalist approach of John Paul II’s teaching. A structure, even for apparent good purposes, should never diminish the person’s freedom and responsibility. On the contrary it should foster personal empowerment.

1.4.5 Culture

John Paul II’s personalism is also very much visible in its retrieval of the theme of culture in CA:

It is not possible to understand man on the basis of economics alone, nor to define him simply on the basis of class membership. Man is understood in a more complete way when he is situated within the sphere of culture through his language, history, and the position he takes towards the fundamental events of life, such as birth, love, work and death. At the heart of every culture lies the attitude man takes to the greatest mystery: the mystery of God. Different cultures are basically different ways of facing the question of the meaning of personal existence. When this question is eliminated, the culture and moral life of nations are corrupted. For this reason, the struggle to defend work was spontaneously linked to the struggle for culture and for national rights (CA 24).

There is an inseparable link between the person and the society that both shapes and is shaped by her. Therefore, the orientation of human activities like production of goods, consumption, work, social interactions always involves culture. For example, John Paul II ultimately attributes the failure of communism in Eastern Europe to its atheist culture (CA 24). A culture cannot ignore a religious dimension.

2 Benedict XVI – 2005-2013

Benedict XVI’s pontificate was shorter than John Paul II’s and with far less direct contributions to Catholic Social Teaching. Nonetheless, he had important reflections about the Church, social justice and Catholic agencies in his first encyclical, *Deus caritas est* (DCE) (2005) and also published a

⁷ Charles Curran, *Catholic Social Teaching 1891-Present : a Historical, Theological, and Ethical Analysis* (Washington DC: Georgetown University Press, 2002), 209

major social encyclical in 2009, *Caritas in veritate* (CiV). Worthy to be noted as well are the 2010 Message for the World Day of Peace, concerning protection of creation, and also an important document from the Pontifical Council Justice and Peace in 2011 concerning the reform of the international financial and monetary systems.

2.1 World and Church Contexts

Key elements of context for Benedict's social teaching include globalization, with several crises associated with it, and secularization in many countries which is a main concern of the German pope.

2.1.1 Globalization

John XXIII, Paul VI and the Second Vatican Council had already highlighted that the social question had become worldwide because of the ongoing process of interconnectedness and "socialization" far beyond national boundaries. However, half a century later, what is now called "globalization" has taken on proportions unsuspected in the 60s. This is in large part the effect of huge technical advances in the areas of communication and transportation. The result is that more and more people around the world, even if separated by large distances, are nonetheless able to communicate and interact with each other and have become dependent on each other, whether they are conscious of it or not.

John Paul II's early pontificate was marked by the Cold War and the ideological competition between East and West. He had labelled the "logic of blocks" as a "structure of sin" (SRS 36). At the dawn of the 21st century, the challenge, and the potential localization of a structure of sin (even if Benedict XVI does not use this terminology), is now rather in the dominant position of giant transnational companies. Globalization was seen first in the internationalization of trade and then of the production of goods but also in an increasingly rapid circulation of capital, the major part of it for speculative purposes. This means an increasing capacity to evade any type of local or national regulation. As the ex-president of a big multinational company expressed it,

For the companies of my group, globalization means freedom to invest when and where they want, to produce whatever they want, to buy and sell wherever they want and to suffer the minimal limitations possible for what refers to labor legislation and the social pact.⁸

In 2007 it was estimated that 500 multinational companies had each a turnover greater than 10 billion dollars a year, meaning greater than the annual national GDP in two thirds of the countries in the world. In other words, each one of those companies is bigger, from an economic viewpoint, than the majority of the countries of the world. Economy overrides politics.

⁸ Luis González-Carvajal, *La fuerza del amor inteligente. Un comentario a la encíclica Caritas in veritate, de Benedicto XVI* (Santander, Spain: Sal Terrae, 2009), 70. Translation mine.

Globalization occurs in a world that has overwhelmingly turned to a very liberal trend of capitalism. The warnings of John Paul II in *CA* about uncritically endorsing liberal capitalism as the road for the socio-economic organization of the societies had no effect. Economy is more and more overridden by finances and the severe crisis of 2007 onwards – which is part of the background of *CiV* – calls for structural reforms that are slow to come. The crisis is not merely financial and economic (sub primes crisis in the USA, then the fall of Lehman Brothers, and the world financial and economic crisis that followed) but there is also a food crisis with a brutal rise in the world prices of basic supplies generating food riots in many countries of the global South between 2005 and 2007, an energetic crisis and the growing awareness of the ecological crisis.

2.1.2 Secularization

For Benedict XVI, the big challenge the Church had to face – the “sign of the times” – is secularization. It is a fact that in the last half century the visible place of religion in Western European societies had dramatically changed. Participation at Sunday mass had dropped, vocations to the priesthood and religious life had shrunk impressively, and polls were confirming that churches had less and less influence on the lives of most people. For Cardinal Ratzinger, and then pope Benedict, this challenge of secularization, which he associated with relativism and individualism, was a major sign of the times for which he had a precise line of interpretation.

In the aftermath of Vatican II the future pope joined with others, like von Balthasar and de Lubac, in endorsing fully the agenda of *ressourcement* initiated at the council, but expressing more worries about the turn taken in the follow-up of *GS* toward positive dialogue with the world. Whereas someone like Chenu, who played a central role in the elaboration of *GS*, stressed the need to pay attention to God’s liberating presence in the concrete history of humankind and to learn from engaging in dialogue with secular science and with other religions, Ratzinger highlighted rather the flaws in human thought on which the Christian faith ought to shed light. He was worried about identifying too quickly the “values of the kingdom” with values put forward by modern societies.

Ratzinger remained especially critical of a form of radical Enlightenment and of the path taken by Modernity as is visible in various forms of liberalism and Marxism alike. He saw this as leading to the present situation of Europe. The combination of a culture of technological progress and of affirmation of the autonomous subject had led to the rejection of transcendence:

Europe has developed a culture that, in a way hitherto unknown to humanity, excludes God from public consciousness, whether he is totally denied or whether his existence is judged indemonstrable, uncertain, and so relegated to the domain of subjective choices, as something in any case irrelevant for public life.⁹

⁹ Joseph Ratzinger, “Europe and the Crisis of Cultures,” *Communio* 32 (Summer, 2005): 345- 356 at 347.

Concern about the forms which Modernity had taken is not limited to European secularization. In the North American context, discussions about individualism and moral relativism encapsulate it better. In Ratzinger's vision of the world, the response of the Church has to be the affirmation of the truth of faith. In face of "the dictatorship of relativism that does not recognize anything as definitive and whose ultimate goal consists solely of one's own ego and desires... we have a different goal: the Son of God, the true man. He is the measure of true humanism."¹⁰ Again, Ratzinger insisted, "what we most need at this moment of history are men who make God visible in this world through their enlightened lived faith."¹¹ This task so well defined by the then cardinal, would remain central for the pope. It definitely shapes the tone and the theological arguments of his social teaching even he had a broader audience than "the Western World." Overall, his teaching on social issues is very much shaped by his being a professional theologian and his desire to give a solid theological basis to Catholic Social Teaching as a response to the secularization process at work in the world.

2.2 Deus Caritas Est

In *Deus caritas est*, the first encyclical of his pontificate, Benedict XVI offered in a first part a fine and profound presentation of his theology of love and then, in a second part, more concrete orientations for the "practice of love by the church" (*DCE*, title of part II). Here he dealt with topics directly related to Catholic Social Teaching: the articulation of the difference between charity and justice, the role of the Church regarding these virtues, and consequently the nature and purpose of Catholic agencies – in particular the Caritas linked agencies – and the type of personnel who should staff them.

Benedict XVI insisted that charity is part of the deepest nature of the Church:

The Church's deepest nature is expressed in her three-fold responsibility: of proclaiming the word of God (*kerygma-martyria*), celebrating the sacraments (*leitourgia*), and exercising the ministry of charity (*diakonia*). These duties presuppose each other and are inseparable. For the Church, charity is not a kind of welfare activity which could equally well be left to others, but is a part of her nature, an indispensable expression of her very being (*DCE* 25).

Though not reducing it to this, the pope puts a particular stress on charity as, "following the example of the parable of the Good Samaritan," "the simple response to immediate needs and specific situations: feeding the hungry, clothing the naked, caring for and healing the sick, visiting those in prison, etc." (*DCE* 31). Working for justice, as a just ordering of the society, is also crucial but the encyclical is careful to distinguish the two and to remind that justice will never exhaust the duty of charity:

¹⁰ Joseph Ratzinger, *Homily at Mass Pro Eligendo Romano Pontifice*, (April 18, 2005). www.vatican.va.

¹¹ Ratzinger, "Europe and the Crisis of Cultures," 355.

Love—*caritas*—will always prove necessary, even in the most just society. There is no ordering of the State so just that it can eliminate the need for a service of love. ...There will always be suffering which cries out for consolation and help. There will always be loneliness. There will always be situations of material need where help in the form of concrete love of neighbor is indispensable (*DCE 28b*).

For the Pope, justice is primarily the responsibility of politics and the State. The Church has to play its part. “It cannot and must not remain on the sidelines in the fight for justice” (*DCE 28*). But whereas charity appears as a *direct* duty – “the Church’s charitable organizations ... constitute an *opus proprium* (proper work)” (*DCE 31*) – justice appears an indirect duty (*DCE 29*). Two ways of contributing to the fight for justice are mentioned. First the Church “has to play her part through rational argument.” Indeed “faith liberates reason from its blind spots and therefore helps it to be ever more fully itself.” Second, the Church’s mission is to “reawaken the spiritual energy without which justice, which always demands sacrifice cannot prevail and prosper” (*DCE 28*). *DCE* adds another distinction by stating that direct work for justice is “proper to the lay faithful” in “their own capacity” rather than the institutional Church:

As citizens of the State, they are called to take part in public life in a personal capacity. So they cannot relinquish their participation “in the many different economic, social, legislative, administrative and cultural areas, which are intended to promote organically and institutionally the common good.” The mission of the lay faithful is therefore to configure social life correctly, respecting its legitimate autonomy and cooperating with other citizens according to their respective competences and fulfilling their own responsibility (*DCE 29*).

The encyclical then moves on to reaffirm strongly the role Catholic agencies that he calls “charitable organizations” (mentioning explicitly “those of Caritas”). They ought to fulfill the Church’s duty of charity in providing response to immediate needs. Nothing is said here of the promotion of development and action for justice at a more political level undertaken by most of this agencies (*DCE 31*). More explicitly, their Catholic identity should be reaffirmed and this implies that the staff should testify to this identity:

With regard to the personnel who carry out the Church's charitable activity on the practical level, the essential has already been said: they ... should... be guided by the faith which works through love (cf. Gal 5:6). Consequently, more than anything, they must be persons moved by Christ's love, persons whose hearts Christ has conquered with his love, awakening within them a love of neighbor (*DCE 33*).

All of this raises debates about a new inflexion in Catholic Social Teaching as regards understanding the commitment of the Church in the fight for justice as *essential* (*JW 6*) or *indispensable* (John Paul II, Puebla) to the preaching of the Gospel. As Dorr suggests, there are ambiguities in the way Pope Benedict uses the word “Church” and the word “Charity,” nonetheless the overall commitment to social justice and the necessity of changes at the structural level remains

undoubtedly on the agenda as *Caritas in veritate* and other more specific documents related to the economic and financial crisis will show.

2.3 Caritas in Veritate

Caritas in veritate – love or charity in truth – are not simply the initial three words of the Latin version of Pope Benedict XVI's 2009 social encyclical. This phrase is the interpretative key and the foundation for the pope's reflection about integral human development in continuing the work of his two predecessors, forty years after Paul VI's PP and twenty years after John Paul II's SRS. Charity is the "principal driving force behind the authentic development of every human being and of all humanity" (CiV 1), but "only in truth does charity shine forth, only in truth can charity be authentically lived" (CiV 3). Therefore, it is by proclaiming the truth of God's love and by shedding the light of the Gospel on present human situations that the church fulfills its mission in society. The church's social doctrine revolves around the principle of "charity in truth" (CiV 6).

The list of social, political, and economic issues addressed in the encyclical is large: markets, financial and economic crises, business enterprise, employment, workers' rights, inequalities, the role of the state, international institutions, migration, etc. Widely noted is a lengthier treatment on the environment than in previous encyclicals and also the incorporation of topics related to the protection of life such as abortion, euthanasia, and bioethics, which were not previously developed in social encyclicals. The focus of the pope, however, is always to analyze the roots of the issues at an anthropological level by invoking the joint resources of faith and reason, and for him this anthropological level is always theological. The great value of *CiV* is that it offers a rich theology of human development and social justice. As noted by Dorr, "the distinctively new element is that it explicitly grounds the Christian's commitment to build a more just world in the love that God, through the Holy Spirit, has poured into our hearts."¹²

Without exhausting the richness of this (very) long document, we can point out a methodological feature and two crucial insights.

In terms of methodology, *CiV* departs from the movement toward induction and dialogue with the world initiated in Catholic Social Teaching by John XXIII, GS and Paul VI, and still at work in John Paul II's encyclicals. Here, the approach to social, economic and political issues is principally deductive. A quick look at the organization of the chapters is compelling, more concrete issues but always by applying the fundamental principle of "charity in truth" to them. The second chapter offers a large panorama of world situations as regards development but this analysis is already shaped in the form of an evaluation according to what was exposed in the introduction. The next

¹² Dorr, *Option for the Poor*, 369.

four chapters are all constructed in the same way. A first section exposes a theological and philosophical set of concepts: gift and gratuitousness; rights and duties; relationality; and technology. Then the remainder of the chapter draws consequences about particular situations. Moreover, the dimension of dialogue is principally oriented toward contrasting the Christian faith with secular thinking rather than discerning the seeds of truth in the latter. In all this, Benedict XVI clearly affirms his concerns for a secularizing world in which sin darkens reason and where the Church through the magisterium ought to expose the truth of the Gospel.

An innovative insight of *CiV* is the reflection around the notion of gift and gratuitousness in chapter 3. Charity in truth is concretely embodied in the dimensions of gift and gratuitousness in personal and social life which are the manifestation of authentic humanity and fraternity. For the pope, this logic of gift is no substitution to justice, but it does not come either as a mere juxtaposition to it. The logic of gift ought to inspire the heart of economic and social relations (*CiV* 34). “The earthly city is promoted not merely by relationships of rights and duties, but to an even greater and more fundamental extent by relationships of gratuitousness, mercy and communion” (*CiV* 6). More precisely, *CiV*, inspired by concrete experiences like that of the Focolare’s economy of communion, shows how a dimension of gift and gratuitousness are necessary for the good functioning of social and economic institutions. If these institutions rest merely on the postulate of a human being as mere *homo economicus*, a rational and self-interest oriented individual, they remain very limited:

If the market is governed solely by the principle of the equivalence in value of exchanged goods, it cannot produce the social cohesion that it requires in order to function well. Without internal forms of solidarity and mutual trust, the market cannot completely fulfil its proper economic function (*CiV* 35).

In the global era, economic activity cannot prescind from gratuitousness, which fosters and disseminates solidarity and responsibility for justice and the common good among the different economic players. ... While in the past it was possible to argue that justice had to come first and gratuitousness could follow afterwards, as a complement, today it is clear that without gratuitousness, there can be no justice in the first place (*CiV* 38).

Therefore, “economic, social and political development, if it is to be authentically human, needs to make room for the principle of gratuitousness as an expression of fraternity” (*CiV* 34). The chapter then goes on with more specific reflections on market economy, finances, the role of the State etc.

Following the financial and economic crisis of 2007 onwards, it is also worthy to highlight *CiV* insights on the topic. The Pope did not condemn the economy, the market or profit but he put everything in the perspective of the human person and of her integral development. Means should not be confused with ends. There is a constant discernment to be operated and the crisis is, in this

sense “an opportunity for discernment in which to shape a new vision for the future” (*CiV* 21). *CiV* reminds us that the economic sphere has an ethical and moral dimension (*CiV* 36). It condemns a radical liberalism which would trust the markets to solve the problems of the society and on the contrary it advocates for an economy regulated by politics within a just humanism:

Economic life undoubtedly requires contracts, in order to regulate relations of exchange between goods of equivalent value. But it also needs just laws and forms of redistribution governed by politics, and what is more, it needs works redolent of the spirit of gift (*CiV* 37).

CiV calls for much more regulation in the financial sector:

Both the regulation of the financial sector, so as to safeguard weaker parties and discourage scandalous speculation, and experimentation with new forms of finance, designed to support development projects, are positive experiences that should be further explored and encouraged (*CiV* 65).

This topic would be further developed in the document of the Pontifical Council on Justice and Peace in 2011 which advocated for some form of international regulatory body.

Again, the richness of *CiV* would require much more time to unfold than this presentation permits. But, neither is it the end of the story: With his resignation in February 2013, Benedict opened the door for a new episode in the story of the Church and also of Catholic Social Teaching.